



How to Create an Effective PMIS Entry

Participant Guide



October 25, 2006

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Welcome

Why a course on *How to Create an Effective PMIS Entry*?

This 3-hour session, *How to Create and Effective PMIS Entry*, will teach TELNPS (Technology Enhanced Learning National Park Service) participants how to write a PMIS project that will compete effectively for funding. Emphasis will be placed on the “why,” not the mechanics of how to enter information into PMIS fields. The course will focus on project entry from beginning to end with emphasis on how to avoid common mistakes that are made during PMIS use. Participants will improve their knowledge of what is needed to write effective titles, project narratives, cost estimates, and document project accomplishments. Knowledge of these areas of PMIS will help you contribute to securing accountability with stakeholders, support our critical mission project needs, and plan for NPS’ future.

Audience

The course is designed for all NPS employees who are responsible for data entry at a park/unit or office. It is also recommended for those who review PMIS entries at the park, region, or WASO levels. Anyone with an interest in PMIS is also welcome to attend.

Instructors

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Ellen Bullock, PMIS Servicewide Coordinator
Stacey Hester, Southeast Region Budget Analyst
Carol Maass, WASO Recreation Fee Project Manager
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Timing

How to Create an Effective PMIS Entry takes place via TELNPS on Wednesday, October 25, 2006 from 12:00 pm until 3:00 pm EST.

Pre-work

Instructors recommend that all TELNPS participants do the following prior to the course:

1. Download and print the **Participant Guide**. The **PowerPoint slides** and **other resources listed on the TEL site**. These resources will also be available at least two days prior to October 25, 2006. Please print these materials using the **duplex** feature at your printer/copier if possible to save on paper usage. To reach the Participant Guide, PowerPoint slides, and other resources, go to:

<http://www.nps.gov/training/tel/schedule/htm>

2. Instructors for this course also strongly recommend that participants have taken the following online e-Courses prior to the class. This is not mandatory, but these courses provide a background on PMIS and the mechanics (i.e. "how to") of PMIS data entry.
 - a. **Course 1: Introduction to the Project Management Information System (PMIS).** In this first PMIS e-Course, users learn why the National Park Service developed the PMIS, how its business practices govern PMIS processes, and how PMIS fits into the bigger picture of NPS budget formulation. Participants will also learn how PMIS processes support the review, approval, and funding of the NPS highest priorities.
 - b. **Course 2: Create a Project.** In this second PMIS e-Course, users learn how to create and edit projects and components in PMIS.

To **register** for the PMIS e-Course, log in to DOI Learn at <https://doilearn.doi.gov>. Once in DOI Learn, you should select the "Course Catalog" tab and then click on the "catalog" link. This action will bring you to a subsequent page. On this page, enter the word "PMIS" into the text box at the top of the page and then click "search." This action will bring you to a listing which displays the five PMIS e-Courses, available TEL classes, and other courses which reference PMIS. To enroll in e-Course 1, select the name link and then enter "0" into all of the boxes which ask about cost. Select "agency" as the "who's funding" selection. Once all information is complete, select the "apply" button at the bottom of the page. This action will return you to the Course Catalog listing and display a message at the top indicating that your registration was successful. This action will also add the course to your "My Courses" section of DOI Learn. When you are read to enter e-Course 1, you should select the "My Courses" tab. Next, select the "Online Courses" link. This action will bring you to a screen which lists all of the courses which you have registered for on DOI Learn. To start e-Course 1, select the "PMIS e-Course 1: Introduction to PMIS" link. On the next page, click on the "Launch PMIS e-Course 1: Introduction to PMIS" link. This action will open a new window and display a brown access screen for your e-Course. You will need to enter your MLM username and password once you reach the brown access screen. Each course takes approximately 1-2 hours to complete. After you have completed e-Course 1, you can repeat the above instructions to enroll for e-Course 2.

How to Interact with the Instructor

With TELNPS courses there is a "protocol" to follow to ensure that you can easily ask questions and others can participate as well. It may seem a little strange at first asking a question of a TV monitor. Remember, it is the instructor you are interacting with and not the monitor. As you ask more questions and participate in more TELNPS courses, you will soon be focusing only on the content of your question and not the equipment you are using to ask it.

As part of the TEL station equipment at your location, there are several push-to talk microphones. Depending on the number of students at your location, you may have one directly in front of you or you may be sharing one with other students at your table.

When you have a question, press and hold down the push-to-talk button, maintaining a distance of 12-18 inches, wait a second and then ask you question or make your comment. It would sound something like this:

Excuse me [instructor's first name], this is [your first name] at [your location]. I have a question (or I have a comment)."

Then release the push-to-talk button. This is important because until you release the button, you will not be able to hear the instructor.

The instructor will acknowledge you and then ask for your question or comment. Stating your name and location not only helps the instructor, but also helps other students who are participating at different locations to get to know their classmates.



Course Goal & Learning Objectives

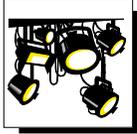
Course Goal

There are two goals for this TEL broadcast. The ultimate goal is that by understanding how to create an effective PMIS entry, you will be more successful in obtaining funds for your needs and the NPS will be more successful in articulating its overall needs and reporting its successes. The overarching goal on this broadcast is to learn how to tell a realistic and compelling story for the project and why it is a need for your park/unit or office.

Learning Objectives

After completing this program, participants will:

1. Be able to describe how you benefit from writing a good PMIS entry
2. Understand the importance of detailed project scoping
3. Be able to identify and correctly complete PMIS data fields
4. Know how to write a compelling title, project narrative, and develop a complete and realistic cost estimate
5. Understand the importance of “closing the loop” of a PMIS entry through Status and Completion Reports
6. Understand the value of incorporating digital images, drawings, reports, etc. to build a case for and document your PMIS projects



Purpose of Effective PMIS Entries

Objective 1. Winning the PMIS Lottery – How you benefit from writing a good PMIS entry

What is PMIS & what is its purpose?

PMIS (Project Management Information System) is one of two official budget formulation systems of the National Park Service used by all organizations Servicewide. The other is OFS (Operations Formulation System). PMIS and OFS were developed to establish credibility of NPS funding requests with the Department of Interior, the OMB (Office of Management and Budget) and Congress.

PMIS is used to identify project needs and request non-recurring and some recurring project funding as part of the annual SCC. The primary reason why you need to pay attention to project scoping, data collection and organization and to write a good PMIS entry is to compete effectively for funding of your park's needs.

Deficiencies identified as part of a condition assessment process in FMSS (Facility Management Software System) for Facilities, or in RAMS (Resource Activity Management System) for Natural or Cultural Resources, are entered in PMIS as projects to request funding to remedy the deficiencies. If the project requires additional staff and/or resources to operate on a continuing basis, an ONPS base funding increase must be requested in OFS to sustain changes brought about by the project.

PMIS also is used to review, approve and prioritize project needs at the park, region and WASO levels. PMIS is further used to track all requested, funded, and completed projects, whether or not they are in any other NPS system. And, PMIS is used to document and report project accomplishments.

PMIS data entry, evaluation and approval processes are intended to be consistent Servicewide in all programs. Various programs have given different instructions on how to document project needs in PMIS. Typically this is because those instructions were based on writing projects to compete for a specific fund source. This inconsistency often results in narrowly focused descriptions and justifications and ultimately causes problems for the entire NPS. The best business practice for PMIS is for the park staff closest to the problem to develop a compelling PMIS project to address a critical, high priority need focused on the work to be accomplished and its benefits to the park, rather than a particular fund source. Fund source managers should use PMIS consistently to ensure maximum benefit for the NPS from available funding.

Data entry and retrieval can be performed at any time. Since data entry is available year-round, users don't have to wait for a budget call to identify their needs. Final editing and approval should be done as part of the SCC. PMIS facilitates allocation of funds based on special emphasis areas. Because its processes are transparent you can see which projects were successfully funded, and priorities that have been set – in your own park and in other parks.

PMIS promotes accountability for project funds by providing transparent, accessible documentation. Since PMIS is centralized, users at any level can readily retrieve project information whenever needed. This enhances the ability of park, region or WASO management to respond quickly to inquiries and requests, and to report progress made in meeting performance goals for projects and programs. Up-to-date PMIS data satisfies external stakeholders' expectations regarding quality and types of data being tracked for accountability.

PMIS has a growing ability to interact with other NPS computerized systems as a means to reduce redundant data entry and the workload of employees, and to improve consistency of information reporting. Some systems already are actively linked to PMIS, e.g. NPS Focus and OFS. Efficiency will continue to increase as other systems are actively linked to PMIS, e.g. FMSS (Facility Management Software System), AFS3 (Administrative Finance System), PEPC (Planning, Environment, and Public Comment), RAMS (Resource Activity Management System) and PMDS (Performance Management Data System).

The primary purpose of PMIS is to request funding for and to track unfunded non-recurring and recurring project needs.

PMIS is a tool to improve performance

PMIS supports performance based management by providing a method for identifying, justifying and prioritizing unfunded project needs by park, region and program. PMIS also provides key information and metrics needed to document past efforts. These tools reduce the time it takes to make decisions and maximize NPS flexibility in getting project work done effectively and efficiently.

PMIS is a tool to report project accomplishment

Program managers need the ability to track the performance of ongoing projects by viewing accomplishments at predetermined milestones. When PMIS component Status and Completion Reporting is current, PMIS can produce timely information to monitor, manage and measure accomplishments and affect performance immediately. Importantly, accuracy and timeliness of information allows the NPS to be accountable to DOI, OMB and Congress regarding the use of appropriated funds.

Why was PMIS developed?

Prior to the inception of PMIS, data for each budget call originally was compiled manually – remember the old 10-238s?

Subsequently, SCC project requests were prepared as separate word processing files by individual offices, and then compiled laboriously on spreadsheets by regions and WASO and entered into bulky binders. This approach was very inefficient, inconsistent, and time-consuming. A task force was convened in March 1998 to design, develop, test and implement an automated system within a 4 month period. The group evaluated many commercially available products, all of which eventually were rejected because of software limitations and time constraints. The initial in-house PMIS system was developed by the NPS IT Center assisted by two college interns during the summer of 1998. Since its genesis, when PMIS data entry was incomplete, the program would remind users to complete missing fields – remember the Mozilla gorilla?



PMIS was developed as part of longstanding efforts to systematically consolidate and document unfunded project needs – especially deferred maintenance needs in the Repair/Rehabilitation program – to efficiently fund these projects, and to monitor and report progress against reducing this backlog. The NPS has been criticized repeatedly by both the Executive Branch and Congress for its inability to quantify the backlog and report on “completed” projects. Through PMIS, the Service is able to respond to Director’s Order #2 (Park Planning), maintain the integrity of the list of documented project needs from year to year, and to report accomplishments in a timely manner providing improved accountability that helps justify increased program funding levels.

Legacy projects

PMIS is an evolving process – not linear. Since 1998 there have been a series of updates to PMIS to improve program efficiencies, simplify data entry, enhance information retention, add supplemental information, and better document the backlog of unfunded project needs in the NPS. All the changes made to PMIS have been to help people better articulate their needs. Projects that were entered and funded prior to system upgrades are known as *legacy projects*. Legacy projects may appear incomplete based on current PMIS requirements, but they met PMIS requirements when created and generally don’t need to be updated to meet changing system upgrades. Status and Completion Reports, however, are required for legacy projects.

PMIS e-course

A five-module PMIS e-Course has been developed to teach the basic principles about using the system. Each on-line course should take users 1-2 hours to complete. It is highly recommend that all PMIS users take the e-Courses appropriate to your level of responsibility to understand how to use the various functions of PMIS for your and your parks’ benefit. From the e-Course modules, you can print the course notes and job aids to use as a reference guide whenever using PMIS.

The PMIS Newsflash

In July 2003, random PMIS software updates ceased in favor of quarterly updates, accompanied by a newsletter called the PMIS Newsflash. This newsletter was created to provide PMIS users and administrators with information on upcoming changes to the software. The newsletter precedes the release of new software versions by at least two weeks allowing users to learn about changes prior to the launch of a new version. The various Newsflash releases can be found by clicking on the link on the PMIS home page.

Park Responsibilities in PMIS for the Servicewide Comprehensive Call (SCC)

The SCC is the formal beginning of a new round of planning for future budgets; it is typically announced in October, at the beginning of the fiscal year. The SCC asks parks and NPS program offices to identify needs both for project funding in PMIS, and for recurring operational funding increases in OFS. The information in PMIS is used to provide the official NPS response to all internal and external inquiries about unfunded project needs and the strategy for addressing those needs.

- In response to the annual SCC, the park is responsible to ensure that their most recent needs are entered in PMIS, and that old draft and invalid projects are purged from PMIS as part of the annual data clean-up. Final project updates, edits and approvals are completed as part of park SCC responsibilities. The park must then prioritize all its projects, lock its priorities, and subsequently select Eligible Funding Categories for the components of each approved and prioritized project. For some selected Eligible Funding Categories the park must next respond to Fund-Specific Criteria. And finally, the park must mark funding components "Park-Submitted" to signal the regional office that they are ready for review.

Regional approval or rejection of park projects is based on quality of PMIS data entry and how well the projects meet funding category criteria. Success will be enhanced by complete and accurate PMIS data entry, including a good explanation of

- **what** the project need is,
- **where** it will be performed,
- **why** it is needed, and
- what **tangible measurable results** will ensue.

A **good cost estimate** is also critical. The DOI and OMB are now asking the NPS to document the total cost of ownership of projects as a way to ensure that operational impacts of proposed projects can be accommodated during this era of tighter annual budgets. Before approval, the region may return a project to the park with a request to edit certain information.

Approved project components are assigned by region to a specific fund source applicable to the work described by the park based on the ability of the request to most successfully compete for funding. This process is known as **formulation**. The collective funding requests formulated by the regional offices describes the total Servicewide need

for each fund source for the future budget years covered by the SCC – the Servicewide 5-year budget plan.

Five-Year Budget Planning

The Department of Interior requires each agency to present a 5-year budget plan to Congress as part of the annual Budget Justification. To complete the NPS 5-year plan, all parks are required to document their anticipated unfunded project needs in PMIS for the 5-year period covered by the SCC (projects submitted for the current call will cover FY2009 – FY2013). Those needs are then confirmed through the regional and WASO review process. PMIS entry of the full universe of current and future project needs of each park for that 5-Year period is vital to developing the Servicewide 5-year plans.

Once a 5-year budget plan is formulated, parks can generate a 5-Year Plans Report in PMIS to see how their requests fared in the Servicewide process, and use the information to develop their own annual work plans.

The Importance of Consistent, Timely, and Accurate Information

The value and efficiency of PMIS are increased when users provide high quality, accurate, consistent, and timely information. **Every piece of bad data entered into, or correct data missing from the system decreases the overall value of the system for other users, at all levels, including outside interests such as the DOI, OMB, and Congress.**

Because PMIS is available any time, it is important to update your project data regularly and to enter new projects as soon as the need is identified. And, because PMIS data is maintained collectively, data must be verified by someone in the park and/or region.

Winning the PMIS Lottery

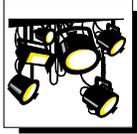
“Some people dream of success, while others live to crush those dreams.” Despite what you may have heard, this is not the philosophy of “Upper-level” PMIS reviewers! Why then does the “journey of a thousand miles” sometimes end badly? Hastily written, half-baked proposals do not compete well for funding when they lack an effective project title, include typos and bad grammar, fail to describe clearly what the project will accomplish, lack compelling supporting data, do not quantify project outcomes, and lack a complete and realistic cost estimate. NPS stakeholders view these omissions or mistakes as evidence of a lack of interest and professionalism in our work. If the park has some “old dogs” left in PMIS, let them go and start fresh project.

“We never bother to fill out any PMIS project requests because we never get any money.” Well, Duh! What comes first, the chicken or the egg? If you have high priority, legitimate project needs and present them in a compelling manner, targeted to the appropriate Eligible Funding Category, you *will* get the money. A complete, accurate, truthful and fully supported project statement will resonate with reviewers, and will enable you to compete effectively and secure funding for a project need, even when Service or Departmental special initiatives have been identified for the SCC.

“A company that will go to the ends of the Earth for its people will find that it can hire them for about 10% of the cost of Americans.” Fortunately PMIS data entry is not being outsourced to the Far East. PMIS data entry is serious business; don't assign this responsibility to staff who are least familiar with your park's project needs, do not use PMIS on a regular basis, or who write poorly.

You may not complete the entire project data entry process in one PMIS session. Instead, you may start with a rough draft and then add details about the project, costs and the implications of completing your project (or of being unable to complete the project if it does not successfully compete for funding). Once you have successfully saved the first screen of project information and your project has been assigned a PMIS number, you can always exit the data entry process and return to complete your work

later using the  icon from the Project Detail Sheet or the  icon from the Project Funding Component header.



Scoping the PMIS Project – Get down and dirty!

Objective 2. Understand the importance of detailed project scoping

The five stages of a PMIS project

- Enthusiasm for the goals
- Disillusionment with the progress
- Search for the guilty
- Persecution of the innocent
- Praise for the non-participants

PMIS Data Entry – Park Actions

PMIS is a database containing over 100 data fields where information about project needs is stored. When a project need is entered into PMIS, the database automatically assigns a unique number to the project record. This number is known as the “PMIS number.” Each project record contains detailed information about the project and the needs it will address. These details include a project title and description, location, justification, cost, time frame, eligible funding categories, project status and more. This information is used to identify, prioritize, and track project funding needs for the entire NPS. Complete and accurate data builds credibility for your need.

Projects and Project Funding Components

PMIS Projects are made up of project information including one or more Funding Components, often referred to simply as “components”. Projects with multiple components exist because they have multiple phases, funding years, or funding sources. Components – not projects – are funded.

What is the difference between a Project and a Funding Component?

- A Project is a stand-alone outcome, made up of a logical group of actions that have a sequence or are functionally related, and it is made up of one or more funding components that fit the same project description and justification.

- A Funding Component is a distinct action that is part of a project, and is performed in a specific year, phase or portion of a project, and is funded by a discrete funding source.

The PMIS Data Entry Process for Parks from Start to Finish

The process of completing PMIS projects can be grouped into multiple stages, some of which are performed at the park level, others at the region, and a few at the WASO level. This course will focus on data entry process at the park level.

- Conceptualize and scope out projects
- Complete PMIS Project and Funding Component data entry & editing
- Review (approve) & Prioritize Projects
- Select Eligible Funding Categories & complete fund source specific criteria
- Submit Funding Components
- Following regional review (and, where the fund source so requires, WASO level review/approval), formulation and funding, contact the regional budget office to set up an account number in PMIS and FFS; work may now begin on the funded PMIS component
- Complete Component Status Reports and Completion Report

Conceptualize and scope out projects

Before undertaking project and associated funding component data entry in PMIS for any fund source, you should complete a careful scoping process that clearly defines the project need and provides a strong justification for the project. A methodical approach to scoping will help you define credible cost elements of your project. Many PMIS cost estimates have underestimated costs by leaving out critical cost items. With fewer Development Concept Plans (DCPs) being completed, data formerly acquired during planning is missing and may have to be obtained and funded during the design and construction process.

As part of your scoping process, assess whether any specific resource or technical data such as, but not limited to the following is needed, and if so, include a cost item in your project:

- T&E species surveys or other unusual compliance
- Hydrology information
- Geo-technical/geo-hazard/seismic surveys
- Archeological investigations, clearance or monitoring (can be expensive)
- Sensitive habitat analysis
- Flood plain mapping
- Topographic surveys
- Detailed soil tests (for bearing loads)
- Soil percolation tests (for septic drain fields)
- Permit requirements (a common concern now by states)
- Coordination with other federal, state and local agencies, and with tribes

As part of your scoping process, also assess whether any specific infrastructure needs such as, but not limited to the following will apply to your project, and if so, include an appropriate cost item in your project:

- Special techniques required to respect wilderness concerns
- Upgrading or extending road access
- Upgrading or extending trails
- Electrical power grid connection (may include line extension) or solar PV system to offset power consumption
- Water system connection or drilling a new well (may include water storage tank)
- Fire hydrants
- Sewer system connection (may include line extension or new drain field)
- Fuel storage to support heating and/or air conditioning needs

Clearly define the project need and provide a strong justification for the project. Determine the full scope of the project, and describe what needs to be accomplished and the desired outcomes. Talk the project through with staff from other divisions to determine potential impacts on park operations. Secure park management team agreement that the project is valid and should be entered in PMIS. Gather relevant data to support project data entry.

Examples of scoping

The following two examples of scoping illustrate portions of a project that at first glance might not have been considered. The message is to take care of the comprehensive need with all of the pieces as one project, rather than funding the individual pieces separately over time.

Dilapidated trailhead kiosk – The project starts out as replacing a dilapidated trailhead information kiosk. On further study, the park determines that the trailhead kiosk provides information for 3 different trails, but the 3 trailheads need to be consolidated in one location. This will require minor trail rerouting. The existing pit toilet is failing and should be replaced with an accessible vault toilet. Minor revisions to the parking area are required to provide 2 accessible spaces. Perhaps there are opportunities for a new interpretive exhibit about a unique natural or cultural resource along one of the trails. Perhaps a portion of one or more trails can be made accessible at least to an outstanding overlook.

Flood damaged trail bridge – The project starts out as replacing a simple wood trail bridge in kind in its previous location. On further study, the trails foreman recalls this is the 3rd time this bridge has been damaged by flooding. Alternate stream crossing locations should be investigated. A new crossing will require minor trail rerouting. Perhaps bridge abutments will be required, and a more durable steel bridge with handrails is needed to span the wider crossing. Compliance is needed since the stream is used by salmon. A T&E species nests in close proximity limiting the time when work may be performed, complicating logistics.

Park staff needs to be thinking of the park mission, their management plans and core operations when they scope out their needs and develop the projects that are required to address them. Review condition assessments, assess the life cycle costs of the project,

and identify critical natural and cultural resource compliance issues and mitigation. Describe any letters of complaint, warnings, compliance orders and/or citations that have been received and require action.

In thinking about sequencing of a project, more than one person needs to be involved in the decisions and thought process. The most effective way is to start in a team setting and discuss the pieces and requirements for that project. It's also helpful to use a checklist for scoping out and scheduling a project:

- What types of compliance will be needed?
- Are any studies or site data needed before writing up the project?
- Have any portions of this project previously been entered in (and possibly been funded) PMIS?
- What kind of assistance will the park need to accomplish this project, from park staff, the region and/or service centers?
- When can the park realistically accomplish this project given staffing and assistance that are committed to it?
- Should the work be funded in a single PMIS project component, or would it make more sense to phase the work, or to fund different parts of the work from different fund sources using multiple components?

Problem: How would you request project funds for this problem encountered during a stay in lodging in a national park? The raccoons opened the slider screen door and found food inside the room that had been provided as a courtesy by the concessionaire.







Mechanics of PMIS Data Entry

Objective 3. Be able to identify and correctly complete PMIS data fields.

Purpose of this TEL class

The PMIS e-Course walks you through each data entry field and explains the “**what.**” The purpose of this TEL class is to explain the “**why**” behind the key PMIS data entry fields, and to explain in detail **how** to write critical title and narrative fields and **how** to develop a complete and reasonable component cost estimate.

It is critical to use all PMIS fields consistently and correctly to ensure that PMIS will interface properly with other software systems and so that we do not populate the other systems with our bad data.

Why Project Identification data fields are important

Project title. The PMIS title provides the first impression of your project. The project title may be your only opportunity to make a compelling impression on the reviewing audience. A poorly written title is guaranteed to hold up approval of your project. Keep in mind that reviewers probably are unfamiliar with your park and certainly lack an understanding of the project need. While the title may make sense to you in the context of your knowledge of the park, omitting a key word or two or using an illogical sequence of words is guaranteed to confound reviewers! 🚫 **A common error is to fail to start a title with an active verb.**

Project contact name & phone number. The person identified as the project lead will be contacted as the person who is most knowledgeable about the project if questions arise during reviews. Thus it is important to keep current the project contact name and telephone number including extension. These fields are open at all times, and should be updated if the project responsibilities change, e.g. as a result of personnel transfers, etc. 🚫 **A common error is to leave an outdated contact name or telephone number in a PMIS project.**

Reference number. This useful searchable field can be used by the park to reference a related PMIS project, data from another system or key programmatic words, e.g. “RCM” or “PLC” to allow park users and/or program managers to quickly sort on a group of projects and to generate reports using that field. It is an optional field.

Congressional District. Entering the single or multiple congressional districts where project activities will take place ensures that congressional interests can see all projects

being planned for or underway in their district. 🚫* **Common errors in data entry are to forget to enter a 4-character code comprised of the state abbreviation and congressional district, or not to enter multiple comma-delimited congressional districts if applicable.**

Project state. This field also is used to identify project location data for a variety of reports to NPS and external stakeholders.

Why Project Narrative data fields are important

Project Description. The description of your project identifies what, where, when and how the project will be accomplished. Your description must be sufficiently complete so that someone totally unfamiliar with the project can understand it and hopefully approve it. For several programs, especially Fees, it is absolutely essential that you capture the direct visitor connection in your Project Description. New facility construction or replacement projects should focus on the functions to be served with a general quantitative description of size or capacity, e.g. an X-thousand square-foot building, or a Y-hundred-thousand gallon treatment plant, to allow for normal refinements that happen during planning and design. When you include specific quantitative information, e.g. type of facility or resource, location, age, dimensions, materials, current condition, etc. you convey to reviewers that you have thought the project scope out carefully and are writing knowledgeably.

Project Justification. The justification describes **why** the project is needed, the urgency and projected impacts of its delay on park resources, assets or visitor experience. You are selling your project by building compelling evidence in favor of its funding. You should clearly describe the difference the project will make by comparing management of the park without the project versus with the project completed. In other words, what is the current situation, and what will be the situation after completing the proposed project? How will the park be changed? Your story will be convincing to the extent you can marshal facts to back up your statements. Since all capital investment and rehabilitation projects will have an impact on park base operations, addressing this concern truthfully will demonstrate your professionalism. 🚫* **A common mistake is to claim unrealistic impacts, operational benefits to the park and/or project benefits to visitors.**

Measurable Results. Quantified tangible benefits or outcomes are essential to document project metrics. This enables the park, region and NPS to demonstrate a positive value achieved for the dollars expensed. 🚫* **The most common mistake is to use generalities, e.g. “Park visitors will be more satisfied with picnic tables,” or “GPRA goal IVa0 is enhanced.”** Reviewers expect you to quantify expected benefits, such as the number of visitors who will benefit from the project (mandatory for Fee funded projects), the asset, feature or resource condition change achieved or new asset produced (FCI change must be documented for Facility type projects), acreage restored, etc.

Why Project Type, and Activities, Assets & Emphasis Areas matter

Project Type. Specifying whether the project type is a Facility or Non-facility is a major deciding point in PMIS project data entry. Several of the remaining data fields in the project entry sequence are dependent on the answer to this question. 🌟* **If you incorrectly label your project it will result in unnecessary or irrelevant data being associated with your project.** A project incorrectly labeled as a Facility will require preparation of a detailed FMSS Parent Work order to children work order hierarchy. A project incorrectly labeled as Non-Facility will be delayed until the detailed FMSS Parent Work order to children work order hierarchy is completed. 🌟* **Errors are commonly made in choosing Facility or Non-Facility.**

- Examples of Facility type projects include: Roads, bridges, trails & boardwalks, buildings, utility systems, campgrounds & picnic areas, piers & docks, fences, retaining walls, cultural landscapes, dams, monuments, fountains, ruins & fortifications, signs, indoor & outdoor exhibits, AV systems, fire alarm & security systems, cost of collection capital improvement, hazard tree removal in developed areas to protect facilities, exotic species control related to facilities, etc.
- Examples of Non-facility type projects include: Research, studies, planning, design, compliance, resource inventories, visitor services, cost recovery projects, cost of collection operations, risk assessments, surveys, project oversight & management, concessioner possessory interest buyout, outreach & curriculum based education programs, AV programs, publications, websites, seed collection & plant propagation, exotic species control in natural areas, conservation of library & archival collections, stabilization of petroglyphs & pictographs, biological resource protection, etc.

Pass-Through Funding. This field is used to track expenses that are incurred by a non-NPS party, but are funded through Congressionally directed NPS appropriations to work on assets not owned by the NPS. Incorrectly labeled projects lead to incorrectly reported dollars obligated to non-federal government or private entities conducting work in non-NPS areas via a grant, cooperative agreement or similar contract.

Partnership Involvement. This field is used to identify projects involving a partnership that benefits a park or program and is funded or co-funded by an organization or entity other than the NPS, such as a park friends group, other non-profit support group, a concessionaire, and federal, state or local government agencies.

Activities, Assets and Emphasis Areas. The purpose of these lists is to identify the type of work that will be done or how an asset will be “touched” (**activity**); identify an **asset or resource** that is being worked on; and to identify initiatives or areas of concern that the project will address (**emphasis areas**). 🌟* **The most common mistake is to omit critical activities, assets or emphasis areas that are directly accomplished, affected by or being addressed by your project.** 🌟* **Another common mistake is to check a lengthy list of activities, assets or emphasis areas – many of which have at best an indirect relationship to your project.** The consequence of poorly mapped activities, assets or emphasis areas is that data sorts will fail to pick up your project when a report is requested by a stakeholder. 🌟* **The third common mistake is to check Deferred Maintenance as an emphasis area for a Non-Facility type project; Deferred Maintenance applies only to Facilities.** The project assets, activities and

emphasis areas are used extensively for searching and reporting at higher levels. Accurate selection of Emphasis Areas allows PMIS reviewers to search for projects that meet specific Service or Departmental initiatives, and to review, formulate and fund additional components when new funding is directed to such an initiative.

Why Primary Asset Type and DOI Categories of Facilities Maintenance & Construction Needs are important

Project Primary Asset Type. Choosing one of the Primary Asset options is required for FASAB (Federal Accounting Standards Advisory Board) reporting to the Department of the Interior (DOI).

Project DOI Categories of Facilities Maintenance & Construction Needs. Project DOI Categories of Facilities Maintenance & Construction Needs are used by some facility programs – primarily Repair/Rehab and Line-Item Construction. Projects are ranked based on the percentage of the work (total project \$) that falls in each of the categories. Assigning the correct percentage value for each of the Deferred Maintenance (DM) and/or Capital Improvement (CI) categories results in a PMIS-calculated DOI Rank (score), which is used to set priorities for funding projects in the 5-Year program. The goal of the 5-Year program is to reduce the percentage of mission critical and mission dependent assets in Unacceptable (Poor) FCI condition.

🚫* A common error in DOI categories data entry is to select percentages that do not equal 100%; in this case PMIS will identify an error and ask you to correct your entries before saving your choices. 🚫* Another common error is not to include both Deferred Maintenance and Capital Improvement categories when both types of work will be accomplished as part of your project. Unless your project Description and Justification support the DOI category percentages of DM and CI work that you select, or if you make claims you can't back up with facts, you are likely to delay your project approval.

It is very important that the DOI categories be congruent with other fields within PMIS, especially project Assets, Activities, and Emphasis Areas. Consistency reinforces the validity of your described project need. You can also use the FMSS child work order sub-work types and your PMIS project cost estimate breakdown to correctly allocate DOI category percentages of DM and CI work.

The DOI Categories of Facilities Maintenance & Construction Needs changed in October 2006 with PMIS version 8.0 to reflect changes in FY2008 Budget Guidance Attachment G. The Compliance & Other Deferred Maintenance category has been split into two categories: "Other Deferred Maintenance," and "Code Compliance Capital Improvement." One new category has been added, "Energy Policy, High Performance, Sustainable Building Capital Improvement." The DOI Categories of Facilities Maintenance & Construction Needs must be updated for all unfunded facility projects during the current SCC. Please refer to the table below for a clearer understanding of what situations require a user to update this information in PMIS for existing projects.

Situation	Action Needed	Consequence of not completing this action
Facility type project has at least one unfunded component that is currently unformulated	Depending on the project's current level of review and their scope, the user must enter the "Edit" or "Needs Edit" area of PMIS. They will see a link which will lead them to the correction of DOI Emphasis Area Percentages.	User will be unable to prioritize that project as part of the current SCC. If the project in question is HIGH banded, they will be prohibited from completing prioritization until the percentages have been updated and equal 100%.
Facility type project has at least one unfunded component that is <u>formulated for FY2008 or beyond</u>	Depending on the project's current level of review and their scope, the user must enter the "Edit" or "Needs Edit" area of PMIS. They will see a link which will lead them to the correction of DOI Emphasis Area Percentages.	User will be unable to prioritize that project as part of the current SCC. If the project in question is HIGH banded, they will be prohibited from completing prioritization until the percentages have been updated and equal 100%.
Facility type project has at least one unfunded component that is formulated for FY2007, <u>but the current DOI Percentages entered by the user do not equal 100%</u>	Depending on the project's current level of review and their scope, the user must enter the "Edit" or "Needs Edit" area of PMIS. They will see a link which will lead them to the correction of DOI Emphasis Area Percentages.	User will be unable to prioritize that project as part of the current SCC. If the project in question is HIGH banded, they will be prohibited from completing prioritization until the percentages have been updated and equal 100%.
Facility type project has at least <u>two unfunded components. One component is formulated to FY2007 and the other is either unformulated or is formulated to a year in FY2008 or beyond.</u>	Depending on the project's current level of review and their scope, the user must enter the "Edit" or "Needs Edit" area of PMIS. They will then see two different links to correct DOI Emphasis Area Percentages. They must ensure that the percentages associated with the FY2007 formulated component correctly correspond to the stated component and total 100%. They must enter a separate link for the other component and enter percentages for the new categories which are associated with the second component. Here again, the percentages entered must total 100%.	User will be unable to prioritize that project as part of the current SCC. If the project in question is HIGH banded, they will be prohibited from completing prioritization until the percentages have been updated and equal 100%.

Why Project Priority Banding matters. Banding helps identify the relative priority of park needs by establishing the project's link to the mission and goals of the park, the urgency of the project, timing and efficiency, and the degree of stakeholder support. Responses to banding questions always default to "Not Applicable" and the project then is assigned LOW band by PMIS. 🌟* **The most common error in older projects is that after Banding was added to PMIS, park users failed to actively select an option for each Banding question.** Failure to update PMIS meant that many funded projects were shown to be of LOW priority banding. This raises flags in several programs, especially Recreation Fees, where funding is expected to go first to the highest Unit Priority, HIGH banded projects that meet Fee program criteria. Another consequence of banding is that all HIGH banded projects with unfunded funding components must be prioritized by the park as part of the annual SCC. MEDIUM and LOW banded projects may be prioritized by the park, but may require supplemental justification. 🌟* **Overemphasizing or underemphasizing banding criteria raises "red flags" and delays getting your project through the approval process.** Responses to Banding questions must honestly reflect the PMIS project narrative Description and Justification. For many projects, the "Not Applicable" choice will be correct for one or more criteria. 🌟* **Another common mistake is to fail to assign a "Significance of Resource" and/or "Threats to Resource" banding component to Facility projects.** Built resources – assets – are just as much a park resource as a natural resource.

Why indicating whether you need Project Assistance is important

In October 2006, a "Project Assistance Needs" data entry selection was added to PMIS. This change to the system was made to assist regional program managers in identifying park needs for assistance associated with entered PMIS projects. Regions indicated that lack of awareness of parks' needs could cause delays in initiating projects and also could create uneven workload distributions throughout the year. Having the capability to create searches and reports listing projects requiring assistance from their parks would be valuable resources. As a result, during the FY2009 SCC park users will be required to enter the new PMIS Project Assistance Needs area of each project with unfunded components and check whether or not assistance is needed for the specified project, and if it is needed, whether the requested assistance is from a Service Center (e.g. DSC or HFC) or a Region, as well as what kind of assistance is needed. Assistance needs that may be identified include Architectural and Engineering Services, Compliance, Project Management/Coordination, On-site Inspection/COTR, Contracting, and Natural Resource Technical Assistance.

Failure to complete this action will result in an inability to prioritize that project. If the park fails to complete this action on a HIGH banded project, they will be prohibited from submitting their updated priority listing. As a result, extra time should be budgeted during FY2009 SCC for the update of data fields and project prioritization.

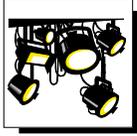
Why the use of Funding Components is important

PMIS Projects are made up of project information including one or more Funding Components. Projects are developed with multiple components when work is phased (different actions that occur in separate years but which are funded from the same fund source), or is funded in separate fiscal years (e.g. for recurring actions) or by different funding sources.

Because components – not projects – are funded, key reporting data is based on component accomplishments. The use of funding components allows the NPS to report accomplishments by fund source. Partnering is important for the NPS; entering the partnership components in PMIS allows for tracking of partnership contributions. The partnership contribution is an integral part of the project and is designated as a separate funding source – “Non-NPS Fund Source.” It is essential to track the partner contribution whether it is in labor, time, money or other resources.

Projects with fewer rather than more funding components are preferred. A new business practice for funding components is that each separate component must have a unique account number. It is essential to have consistency of data across the board in terms of how projects vs. components are entered and used by all NPS programs.

A new data entry box has been added to PMIS funding components, for users to record the projected component labor cost type. Options are Contract Labor, Non-permanent NPS Staff/Day Labor, and No Labor Costs Requested. Your answer will help project the future workload for contracting offices, and generate reports requested by stakeholders.



Titles to Dollars – Get it Right!

Objective 4. Write a compelling title, project narrative, and develop a comprehensive cost estimate – flowers without the manure

Titles

Titles must start with an action verb. If you need to refer to something specific for the purposes of searching, use the project level “Reference Number” field, or component level “Funding Component Reference Number (Multi-Purpose)” field. If a special reference must be in the project title, e.g. PLC, it must be placed at the end of a PMIS title separated by a dash (– PLC) or parentheses (PLC).

The project and component titles should be revisited at every level of review and improved upon at that point in time. The project title is a person’s first, and sometimes, only opportunity to make a compelling impression on the reviewing audience. If it’s not a grabber, the project might not go any further. The project title may be the only information about your project which goes forward to Congress. If the project title isn’t compelling, then it may be an indication that the project should be weeded out.

“Top 10 PMIS Project titles”

These are real PMIS titles that were submitted for funding by park users. While the titles may have made sense to the person writing the text, omitting a key word or two or using an illogical sequence of words is guaranteed to confound reviewers! Remember that you’re writing for an audience that probably never has visited your park and may not have a clue what problem you want to solve.

- #10 Ranger Hay Rides
(let’s reward our hard-working rangers at the end of the season)
- #9 Remove Ponca Low Water Bridge
(to improve visitor services, let them wade across instead)
- #8 Provide Conservation Treatment Historic Paintings
(it seems we’re planning to make historic paintings of our conservation treatment process)
- #7 Replace Wood Appurtenances
(we don’t know what pieces need replacing, or where they are, but we sure know they’re appurtenant)

- #6 Stabilize Historic Magazine on Visitor Trail
(we found the rare May 1972 issue of Guns and Ammo on the trail and decided to stabilize it in place as a reminder of 20th century culture)
- #5 Establish Baseline Resource Managers Monitoring
(these Resource Manager rascals need to be monitored, or they'll want hay rides too)
- #4 Install Sweet Smelling Toilets at Savage Cabin
(downwind air quality monitoring not included in project)
- #3 Re-Establishment of Lost Picnic Area
(project schedule is delayed until the picnic area is finally found)
- #2 Stabilize, Repair and Restore Historic Convent and Chapel to Meet Life Safety Codes for Nuns
(including speed dial to heaven)
- And, in a tie for #1 Provide Internet Access at Fish Creek Amphitheater for Visitor Evening Programs
(the program's a dud, so we better give visitors internet access)
- And also #1 Install Alarm System in Park's Burial Caves
(so the dead can ring when they want out!)

How to write an effective PMIS project title

The PMIS title provides the first impression of your project. It should provide a concise description of the project, including **what** work will be performed and **where**. The PMIS title field is limited to 100 characters including spaces. The project title always must:

- **start with an action verb that is not abbreviated** ("Rehab" is not a recognized word or a verb; use "Rehabilitate")
- **be formatted in Title Case** (the first letter only in each word is capitalized, except for articles, e.g. "the" and "an," prepositions such as "in," "of," and "with," and the word "and" – these are always written in lower case text), and
- **never end with a period**

The 4 examples that follow show how a PMIS user might proceed from an initial rough draft for a project title to one that accurately captures the full intent of the project and at the same time meets the PMIS title field limit of 100 characters. The bullet comments below each version of the title describe typical title problems, changes made during revisions and any remaining critical issues.

First example

“Rehabilitation of Three Restrooms.”

- Title doesn’t start with an active verb
- Spelling error in title and period incorrectly used at end of title
- Does not describe where the restrooms are or whether they are for public use
- May not correctly capture all types of work that will be performed

“Rehabilitate Two Restrooms at the Lodgepole Campground”

- Title correctly begins with an active verb
- Location of project is now described
- The reason for rehabilitation of restrooms is not apparent
- Public use and therefore direct public benefit is established
- May not correctly capture all work and the type of work that will be performed

“Rehab Two Dilapidated Restrooms and Construct a New Handicapped Accessible Restroom at the Lodgepole Campground”

- Title incorrectly begins with a nonexistent word and is not a verb
- Location of project is described
- The reason for rehabilitation of restrooms is apparent – dilapidated condition
- Public use and therefore direct public benefit is established
- Captures all the work and the types of work that will be performed
- 111 character length exceeds PMIS title 100 character limit

“Rehabilitate 2 Vandalized Toilets & Construct a New ADA-Compliant Restroom at Lodgepole Campground”

- Title text is finalized by revising wording, using a numeral instead of word, using “toilets” instead of “restrooms,” dropping “the” and using an “&” instead of “and”
- 98 character title will be accepted by PMIS

* * * * *

Second example

“Yellow Jacket Wasp Abatement In Visitor Use Area”

- Title doesn’t start with an active verb
- Preposition “In” is incorrectly capitalized
- Doesn’t describe where the visitor use area is
- Not clear if this is a project to develop an abatement program or to suppress the wasps

“Develop a Wasp Abatement Program to Suppress Yellow Jacket Populations in Areas of High Visitor Use, Including the Visitor Center, Trails, Campgrounds and Picnic Grounds”

- Title correctly begins with an active verb
- This title implies that this project will develop a wasp suppression program but still isn't clear whether actual suppression efforts will be conducted
- Public benefit is clearly described, though locations are somewhat generic
- 169 character title has redundant text and far exceeds the PMIS title 100 character limit

“Suppress Yellow Jacket Populations in High Visitor Use Areas, Including the Visitor Center, Trails, Campgrounds and Picnic Grounds”

- Title correctly begins with an active verb
- Revised title now is clear that the project will suppress wasps, not develop a program
- Public benefit is clearly described, though locations are somewhat generic
- 130 character title still exceeds the PMIS title 100 character limit

“Suppress Yellow Jacket Populations around the Visitor Center, along Trails, and in Campgrounds & Picnic Areas”

- Title correctly begins with an active verb
- The project correctly describes a wasp suppression effort, not program development
- Public benefit still is clearly described, though locations are somewhat generic
- 109 character length is much closer to the PMIS title limit but still is too long

“Suppress Yellow Jacket Populations to Improve Visitor Experience & Safety”

- Title correctly begins with an active verb
- The project correctly describes a wasp suppression effort, and now describes 2 direct benefits to visitors – helpful to secure WASO level approval
- Location data is now missing
- 73 character title will be accepted by PMIS

“Suppress Wasp Populations in Crater Rim High Use Areas to Improve Visitor Experience & Safety”

- Title correctly begins with an active verb
- The project correctly describes a wasp suppression effort, retains the 2 direct benefits to visitors, and identifies locations of the project
- 93 character title will be accepted by PMIS

* * * * *

Third example

“Park cave inventory and mapping”

- Title doesn't start with an active verb
- Title case was not used
- Direct public benefit isn't captured

“Conduct Integrated Inventory And Assessment Of Park Caves”

- Title revised to start with an active verb
- Title case used, but “and” and “of” are incorrectly capitalized
- Direct public benefit still isn't captured

“Conduct Integrated Inventory and Assessment of Park Caves to Assess Caves That May Be More Fully Opened to the Public in the Future”

- Added wording captures a direct public benefit
- 131 character length exceeds PMIS title 100 character limit

“Conduct Integrated Inventory and Assessment of Park Caves to Identify Opportunities for Future Public Access & Interpretation”

- Wording of title is edited to reduce redundant text but still captures the essence of the project
- A second direct public benefit, interpretation, is captured – this will help secure WASO level approval
- 125 character length once again exceeds PMIS title 100 character limit

“Conduct Inventory & Assessment of Park Caves to Identify Opportunities for Public Access & Interpretation”

- Text edited again to eliminate unnecessary words for a title
- The second direct public benefit is retained to help secure WASO level approval
- 105 character length is much closer to the PMIS title limit but still is too long

“Inventory and Assess Park Caves to Identify Opportunities for Public Access & Interpretation”

- Title text is finalized by revising active verb of the beginning
- The second direct public benefit is retained
- 92 character length will be accepted by PMIS

* * * * *

Fourth example

“Park Shuttle System”

- Title doesn't start with an active verb
- Does not describe the type of work that is being requested, e.g. develop a system, purchase of vehicles, rehabilitate shuttle bus stops, operate a system, evaluate quality of an existing transportation system, partnerships, etc.
- Implies a direct visitor benefit, but the shuttle may be for employees only

“Purchase Fuel Efficient Busses to Replace Polluting Diesel Busses for the Yosemite Area Regional Transportation Public Shuttle System (YARTS) in Partnership with a Regional Transportation System”

- Title correctly begins with an active verb
- Location of project is now described
- Public use and therefore direct public benefit is established
- Type of busses being purchased is not specific – this may be OK if a final decision has not been reached
- Title has redundant wording and at 194 characters, far exceeds the PMIS title 100 character limit

“Purchase Fuel Efficient Busses to Replace Polluting Diesel Busses for the Yosemite Area Regional Transportation Shuttle System Partnership”

- Redundant text deleted, but now it isn't clear this funding will be for park use
- Type of busses being purchased still is not specific
- 138 character length exceeds PMIS title 100 character limit

“Purchase Electric Busses to Eliminate Yosemite Valley Pollution by Park Transit System Diesel Fleet”

- Wording is changed to be specific about type of busses being purchased
- Wording is specific about benefit that will be achieved – eliminating Yosemite Valley air pollution
- Specific visitor benefit is implied – busses will be for the park transit system
- 99 character title will be accepted by PMIS

* * * * *

Some programs add a program abbreviation to end the Project Title to enable quick sorts using the PMIS Search function. Do the following examples have any obvious errors?

- ***“Seal and Chip Park Roads - Boulder Beach campground and interior roads - RCM”***
- ***“RCM - Repair Reverse Osmosis Water Plant at Stovepipe Wells”***
- ***“Reconstruct Failing Visitor Launch Facilities for Continued Safe Operation (Phase 1) - SNPLMA”***
- ***“Salt Cedar FY2003 (Furnace Creek area) - PLC”***
- ***“Repair Pacific Crest Trail (PLC)”***

How to write a compelling PMIS project narrative

Complete, concise and accurate data entry will minimize problems during regional and higher level reviews and will enhance chances for funding. Remember, if you have Editing Rights and began project data entry but your session ended before the project record was completed, you'll need to log on again before continuing project data entry. To continue, you must locate the project using the project title, the PMIS number, or other Search parameters and then continue entering data into the system by clicking



the  icon on the Project Detail Sheet. All projects will be listed as “Draft” status until they have been park approved.

Project Narratives

The project narratives section consists of the Description, Justification and Measurable Results. You can import digital images from NPS Focus as part of the Justification to help present a compelling case for your project need. Information on “how to” add or remove an image is included in Appendix B of this document. The Project Narratives screen is where you explain your project in detail, justify it, and describe tangible, **quantified** measurable results. After thorough project scoping, you should have these details well thought out.

The screenshot shows the PMIS web application interface. At the top, there's a navigation bar with buttons for Log Out, Create Profile, Switch Profile, Search, Process, Report, and Help. Below this, a user profile box displays 'Hello, Ellen Bullock' and a link to 'View Current Profile'. A red banner indicates 'PMIS 6.0 News Flash October 2006' with a note about browser requirements. A vertical menu on the left contains links for Log Out, Create Profile, Switch Profile, Search Menu, Process Menu, Report Menu, Help Menu, Submit QA Report, and Read QA Report. The main area is titled 'Project Narratives - PMIS 120027' and contains three large text input fields: 'Project Description [Size Limit: 2000 Characters]', 'Project Justifications', and 'Measurable Results [Size Limit: 4000 Characters]'. The 'Project Justifications' field includes icons for 'Add Image Link' and 'Delete Image Link', and links for 'NPS Focus FAQs' and 'NPS Focus Data Entry'. At the bottom, there are three buttons: 'Check Spelling', 'Save and Continue', and 'Cancel and Exit'.

It's a good idea to write the text sections of your *Project Narratives* in MS Word and then paste them into PMIS when you're finished, since there's always the possibility of losing your internet connection. Save your text frequently in Word. When you're working in the Web-based PMIS system, your data isn't stored in the server until you press the "Save" button. You can use the **Check Spelling** button at the bottom of the page to check for errors in PMIS text fields. Beware that when you **Save and Continue** in PMIS, the program usually advances you to another screen, so that's usually not a viable option when first creating a new PMIS project.

- **Caution:** When importing text from MS Word, some punctuation marks show up as inverted question marks (¿) in PMIS text fields – this is a program glitch. You will need to edit out these inconsistencies as part of your final review.
- **User Tip:** When importing text into a PMIS narrative field, save the text block in an **.rtf** format instead of MS Word **.doc** and you will avoid a number of the odd characters that are transferred over to PMIS.

Project Description

The description of the project should clearly, concisely and accurately describe **what, where, when and how** the project will be accomplished. The field is limited to 2000 characters including spaces and punctuation marks. Your description must:

- Be sufficiently complete that someone totally unfamiliar with the project can understand it
- Be clear about the type(s) of work to be accomplished, e.g. is it all rehabilitation, or does it include planning, rehabilitation and new construction

- Identify the existing problem and relevant specific quantitative information (e.g. type of facility or resource, location, age, dimensions, materials, current condition, etc.), and the proposed solution
- New facility construction or replacement projects should focus on the functions to be served with a general quantitative description of size or capacity, e.g. an X-thousand square-foot building, or a Y-hundred-thousand gallon treatment plant, to allow for normal refinements that happen during planning and design.
- Describe project duration, timing, and phasing (if applicable)
- Be clear whether term, seasonal or contract labor will be used

Funding Component Description

Completing the Funding Component Description is mandatory for projects with multiple Funding Components. The Funding Component Description must concisely and completely describe work specific to each Funding Component, including the asset change expected to be achieved for Facility type projects. The Funding Component Description may be short if the Project Description and Justification are comprehensive.

Project Justification

The justification should describe clearly, concisely and accurately **why** the project is needed, the consequences of its delay, and the specific changes that have occurred and/or impacts that are occurring on the resource, asset or visitor experience. Tailor your effort on PMIS data entry to the requested funding amount of the project. More doesn't mean better; focus on the flowers, and save the manure for your garden. As Mark Twain's said, "*I would have written you a shorter letter had I more time.*" A good project justification should include:

- A brief history of the problem to be corrected and its impact on the park
- Cite any supporting documents or evidence, e.g. laws, court orders, citations, lack of code compliance, condition assessment, planning documents, structure LCS listing, etc. applicable to the existing asset or situation
- Describe alternatives that were considered and rejected, and the reasons for rejection
- Describe the improvements that will result if funds are provided. Clearly describe the difference the project will make by comparing management of the park without the project versus with the project completed. In other words, what is the current situation, and what will be the situation after completing the proposed project? How will the park be changed?
- Describe what might reasonably happen if funds are not provided
- Identify the specific types of benefits to the park and visitors, e.g. increased revenues, operational savings, number of visitors served, enhanced protection of the government's investment in facilities, safety, protection of natural resources, pollution abatement, public health benefits achieved, etc.
- Identify the total cost of ownership of the project. In an era of ever tighter budgets, the DOI is requiring all agencies to use performance measures to ensure optimal efficiency in accomplishing their mission. To that end, the NPS is moving toward the

concept of *Total Cost of Ownership* of assets. Total costs of ownership include a) initial cost of construction or of the project; life cycle costs of maintaining the asset (recurring custodial costs, and component renewal costs, e.g. roof replacement); and operating costs (programs, staffing and materials needed for the services provided).

All capital investment and rehabilitation projects will have an impact on park base operations. If additional operational resources are required, the PMIS project must have an associated OFS record. The PMIS Project Justification should describe what the impact of this project will be on the park's operating base. As specifically as possible, identify the current annual operating costs of the facility, and the projected annual operating costs after completion of the capital investment or rehabilitation project. You must also address what the consequence would be of not getting the requested OFS increase, e.g. identify what existing services or programs would be dropped, or if the proposed PMIS project would be dropped.

To ensure an optimum chance to compete successfully for funding, your PMIS Project Justification should address Three Critical Questions posed by OMB for all capital asset investment projects:

- *“Does the investment in a major capital asset support core/priority mission functions that need to be performed by the Federal Government?”* Or, in other words, why does the NPS in general and your park specifically have to perform the function enabled by this project?
- *“Does the investment need to be undertaken by the requesting agency because no alternative private sector or governmental source can better support the function?”* Or, does this function have to be performed in a federally owned facility or with a federally owned information technology (IT) system, or are there other reasonable on-site or off-site options, e.g. partnerships, private entities, concessionaires, etc?
- *“Does the investment support work processes that have been simplified or otherwise redesigned to reduce costs, improve effectiveness, and make maximum use of commercial, off-the-shelf technology?”* If this function is part of the core mission for the NPS and specific to your park, is the work being accomplished in the most cost efficient manner? Are business practices streamlined insofar as possible? What alternatives were considered and rejected, and why?

The answers to these questions are considered the heart of the “business case” for investments in capital assets that are subject to OMB’s circular A-11, Part 7 requirements and DOI’s Capital Planning and Investment Control (CPIC) guidelines. Circular A-11, Part 7 pertains to planning, budgeting, acquisition and managing capital assets government-wide. CPIC is a systematic approach to selecting, managing and evaluating major facility construction and IT investments within DOI. Both require federal agencies to focus more on the total cost of ownership and the results achieved through major capital investments while streamlining the procurement process. Capital asset plans are required by OMB in the form of an Exhibit 300 for all multi-year capital construction projects, and all projects over \$10 million. Capital asset plans are required by CPIC for all capital construction projects over \$2 million.

Measurable Results

Formerly parks could spend project money and everyone was happy. Now parks compete for the dollars, spend the dollars and report on the dollars. Measurable results quantify change achieved for the project dollars that were invested.

Measurable Results are performance measures: data must be quantified. All asset projects must document FCI change achieved. Measurable results set the standards or bookmark against which we will later judge success – the front page of the book in terms of how we talk about our accomplishments. The component Status and Completion Reports are the end of the book.



When entering measurable results, you must quantify the tangible benefits/ outcome expected to be achieved by completing the project. Quantify the number of visitors who will benefit from the project (this isn't always possible, but it's mandatory that Fee funded projects have a direct visitor benefit). As appropriate, describe asset, feature or resource condition change achieved (FCI change value) or new asset produced. Describe specifically how operational efficiency will be enhanced and quantify operational \$\$ savings achieved. Document additional revenue generated, visitors contacted or school programs given over the existing baseline. Include metrics that correspond to PART (Program Assessment Rating Tool). Describe GPRA goals achieved in a measurable way, not simply "addresses GPRA goal 1a2b." Some examples of quantified measurable results might be:

- 6.35 miles of the Red Eagle Trail will be restored from poor to good condition, benefiting an estimated 42,000 trail users annually. FCI Change achieved is 0.102
- A new 650 square feet ADA-compliant restroom will be constructed serving an estimated 23,000 campers each summer, replacing a non-accessible dilapidated vault toilet. FCI Change achieved is 0.457
- 430 acres of Scotch Broom will be eradicated in the West Cove developed area and 430 acres of native plant communities will be re-established, achieving an 87% reduction in total Scotch Broom acreage. 63,000 visitors have an enhanced opportunity to view rare bird species in their native habitat.
- 920 historic glass photographic images will be stabilized and recorded digitally for use by an estimated 200 researchers annually.
- 24 diesel busses will be replaced by electric busses for the Yosemite Valley transit system, achieving an estimated reduction of 6 tons of carbon emissions annually and more efficiently transporting 280,000 visitors annually. Operational maintenance savings are estimated at 3 service intervals each summer per bus @ \$1,250 per service = \$90,000/year.

The key measurable result for asset type projects is the FCI (Facility Condition Index) change achieved. To document change achieved, it is critical to have good information from this perspective from the beginning. The FY2009 Budget Call Attachment G asks for FCI information for each asset in each project. FCI change comes from costed FMSS child work orders. The FCI change cannot be documented unless the Work type, Sub-work type and CRV (Current Replacement Value) are documented in FMSS along with costed child work orders. The API value must also be documented for each asset in each project.

Changes made to PMIS in version 8.0

In October 2006 several changes were made to PMIS to support recent modifications to DOI's Attachment G. These changes apply to the data entry process completed by the park and the output viewed by regions and/or program managers through the report module.

Project DOI Categories of Facilities Maintenance & Construction Needs

As seen in the following screenshot, a new selection called "Energy Policy, High Performance, Sustainable Building Capital Improvement Needed" has been added to the Capital Improvement Needs section of the Project DOI Categories page. In addition, the existing "Other Deferred Maintenance" category has been split into two field entry areas. Users will now be able to select "Other Deferred Maintenance" (under Deferred Maintenance Needs) or "Code Compliance Capital Improvement" (under Capital Improvement Needs). PMIS will calculate a project score/ranking for this section based on the entered formulated FY. Components with FY2007 and earlier will use one calculation which differs for those needs formulated to FY2008 and beyond.

Process Menu
Report Menu
Help Menu
Submit QA Report
Read QA Report

Do you know these?

- For each facility project, one primary asset type must be identified as required by FASAB.
- Historic Facility:** A historic structure, prehistoric structure, or cultural landscape that is listed on or is eligible for listing on the National Register of Historic Places or is managed as a cultural resource based on a decision reached through the park planning process.
- Non-historic Facility:** Facility that does not meet the

Deferred Maintenance Needs — FY08 and Later

Critical Health and Safety Deferred Maintenance Need	0 %
Critical Resource Protection Deferred Maintenance Need	0 %
Critical Mission Deferred Maintenance Need	0 %
Other Deferred Maintenance Need	0 %

Capital Improvement Needs — FY08 and Later

Critical Health and Safety Capital Improvement Need	0 %
Critical Resource Protection Capital Improvement Need	0 %
Energy Policy, High Performance, Sustainable Building Capital Improvement Need	0 %
Code Compliance Capital Improvement Need	0 %
Other Capital Improvement Need	0 %

Historic Project
 Non-historic Project

Save and Continue Cancel and Exit

Changes made to the DOI Emphasis Area screen will require PMIS users to modify existing PMIS records. As mentioned in the "Project DOI Categories of Facilities Maintenance & Construction Needs" section of Objective 3, Facility projects with unfunded components must be validated to ensure that the sum of all category percentages adds up to 100%. The cases which require attention were outlined in a table within that section.

DOI Maintenance and Construction Plan Project Data Sheet

Several changes also have been made to the reporting module within PMIS:

- A new entry has been added to the data sheet that indicates whether a project requires Capital Asset Planning. The answer displayed is contingent on established thresholds.
- With this software release, PMIS will automatically display the class of estimate which was entered by the park user during the initial entry of the associated funding component on the DOI Maintenance and Construction Plan Project Data Sheet.
- The Project Justification section of the data sheet has been modified to include the DOI Asset Code, Real Property Unique Identifier, and API, FCI Before and FCI Projected values for each asset. This data will be retrieved from the Facility Maintenance Software System (FMSS) via an interface. For new projects, users will be required to enter the PMIS Number and Parent FMSS Work Order number in order to extract this information from FMSS. For existing PMIS projects, users will be required to update the existing FMSS work order numbers in PMIS and the corresponding parent work order numbers for this data retrieval process to function properly.
- The Project Justification section of the data sheet now includes a new data entry section called "Revision Statement." It will be hidden from the user's view initially. However, this field will be used to explain why the Project Data Sheet associated with the project was revised for cases where the project has a "Region Level Review" status.

Project Funding Component

Each PMIS project will include one or more project Funding Components. A project Funding Component represents a distinct action or work performed in a specific phase, year or portion of a larger project and each is funded by a unique fund source. Funding Components must be used to identify multiple fund sources used to accomplish a single project. Projects are approved and prioritized as a whole, while a Funding Component is only submitted for a designated FY. Funding takes place at the Funding Component level. If you are entering multiple project Funding Components, data entry for each must be accomplished separately from beginning to end. Each project Funding Component includes its own cost estimate.

Project Funding Component Cost Estimate

A Cost Estimate is a compilation of all the costs of elements included within a Funding Component. PMIS users are required to enter a separate complete cost estimate for each project Funding Component. Collect detailed information about costs related to your project before you begin to enter data in this section. A methodical approach to scoping will help you to define cost elements of your project. The cost estimate fields in PMIS are very specific and require that you have a good understanding of the costs of items associated with your project and each of its Project Funding Components.

Project Funding Component Cost Estimate Information - 120027A

Component Cost Estimated By Ellen Bullock	Date of Estimate [mm/dd/yyyy] 10/13/2006
Class of Estimate <input type="radio"/> A <input type="radio"/> B <input type="radio"/> C <input type="radio"/> D	Estimate in - Read Only 2007 Dollars
Are Estimates generated by CESS? <input type="radio"/> No <input type="radio"/> Yes	Parent FMSS Work Order Number [5-10 Digits]: <input type="text"/>

Project Funding Component Cost Estimates By Items - 120027A

Item No.	Item	Quantity	Unit	Unit Cost	Item Cost
Current component funding request amount:					\$0.00
Current estimated total project cost amount:					\$0.00

NOTE: You can add a new item OR edit existing items and save your changes below.

Item 1 [200 Characters Limit] : Add New Item

Item Description [4000 Characters Limit] :

Detail Item Estimate:

Quantity	Unit	Unit Cost	Item Cost
<input type="text"/>	Acres	<input type="text"/>	\$0.00

Class of Estimate. There are 4 classes of the cost estimates based on NPS definitions:

- **Class D:** An estimate based on an educated guess only used during the draft stage. It should be upgraded to at least a Class C estimate prior to submitting the project for funding consideration.
- **Class C:** A conceptual or order of magnitude cost estimate done at the preliminary stages of planning and design; these estimates are the most common and generally are prepared without complete details. For construction projects, a Class C cost estimate is based on square foot costs of similar construction. CESS generated estimates are Class C estimates.
- **Class B:** A budgetary estimate which is a combination of conceptual and unit costs. For construction projects, a Class B estimate is done after planning and preliminary design has been accomplished, and consists of a combination of lump sum (conceptual costs), assemblies and unit price costs.
- **Class A:** A detailed or definitive construction estimate prepared at the end of the design phase and with completed construction documents. It is based on a thorough quantity take-off estimate from completed construction drawings and specifications. For non-construction projects a Class A estimate is based on actual bids for contracted services.

Generally, the draft project Funding Component entry will use a Class D estimate. This will be upgraded to a Class C estimate before a Funding Component is Park-submitted. The Class C estimate in turn may be upgraded later depending on program area requirements.

CESS Generated Estimates. The Cost Estimating Software System (CESS) is a feature in the Facility Management Software System (FMSS) to assist in the cost estimating of facility/asset type projects. PMIS users should select the **Yes** radio button when the Component Cost Estimate was calculated in FMSS using CESS. A Facility project Funding Component with a recorded FMSS Parent Work Order number should have an associated CESS estimate. As previously noted, CESS generated estimates are Class C estimates. Once a Class B or Class A estimate is prepared and entered in PMIS, the CESS generated estimate is superseded and you should select the **No** radio button. Non-Facility type projects should select the **No** radio button.

Comma Delimited List of FMSS Work Order Numbers. List the FMSS Parent Work Order number that relates directly to the PMIS project Funding Component in the assigned Component data field. The information entered into this field must be between 7-10 numeric characters. Information not meeting this criterion will not be accepted by PMIS. FMSS Parent Work Order Numbers are required for all Facility projects. Program managers in regions and WASO will not fund a Facility project without an FMSS Parent Work Order number. Current PMIS and FMSS policy requires using a single Parent Work Order number for each Facility type project Funding Component. PMIS and FMSS data must be for applications such as the Recreation Fee Comprehensive Plan that pull data from both software systems.

Project Funding Component Cost Estimate by Item. Developing a complete, credible and accurate cost estimate is mandatory for all fund sources. PMIS allows you to enter as many cost items as needed to complete a detailed project Funding Component cost estimate. You will have to report the Funding Component account costs by Budget Object Class (based on AFS3 data) in the Component Completion Report. Consequently, at minimum you should identify relevant project costs in the Component cost estimate by

- labor (personal services)
- travel
- contract cost
- supplies
- equipment, and
- other miscellaneous costs

Historically NPS cost estimates have not been stellar, but have improved over time. We tend to underestimate costs in many cases by leaving out critical cost items. Typical errors in initial construction cost estimates have included:

- 🚫 Leaving out significant items in the project scope (e.g. utility connections for a new building, components necessary to comply with current regulations and codes, hazardous materials abatement and disposal, etc.);
- 🚫 Inaccurate or outdated lump sum “guesses” for specialized items (e.g. exhibits, mechanical systems, etc.);
- 🚫 Insufficient adjustments for unknown conditions of existing facilities (e.g. design contingencies to cover dry-rot in historic structures, corrosion in buried piping, etc.);
- 🚫 Incomplete factors for general conditions (e.g. mobilization, contractor overhead and profit, etc.);
- 🚫 Inadequate adjustments for project location (e.g. remoteness, bridge load limits, high cost areas, etc.); and/or
- 🚫 Use of adjustment factors based on private-sector commercial construction rather than for construction work to be done for the Federal Government and the National Park Service.

A good, detailed cost estimate for a complex project will include multiple cost elements and demonstrate that you have systematically researched unit costs. As appropriate for your Funding Component based on the magnitude of the total project, your cost estimate should include cost data for some or all the following items, as well as any of the resource or technical data, or infrastructure needs previously identified in the project scoping section of this TEL session:

- planning (Development Concept Plans, Historic Structure Reports, etc.)
- pre-design (5% of net construction costs) and supplemental services (2% of net) for a maximum of 7% – use only if broken out as a separate PMIS Component for construction projects that require DAB submittal
- design (10% of net construction costs when pre-design is broken out as a separate PMIS Component for projects that require DAB submittal)
- or, combine these costs as project planning and design (a maximum of 17% of net construction costs is allowable)
- compliance (3-5% of net construction cost is typical)
- construction management – sometimes called inspection or supervision (8% of net construction costs), and
- construction contingency reserve (10% of net construction costs) – an allowance for modifications during construction, not to be confused with design contingencies described below

The allowable percentages shown above are maximums per the National Academy of Public Administration (NAPA) guidelines adopted by the Congress for NPS construction, and are based on the project net construction cost. Some leeway is permitted for projects under \$500,000 total cost.

The following items should be included for smaller facility construction or rehabilitation projects (generally under \$500,000 in total project cost):

- construction labor
- materials
- equipment rental
- site restoration/revegetation
- travel (e.g. USPHS consultant)
- contracted services
- adjustment factors or “mark-ups,” such as design contingencies, remote location factor, historic preservation factor, etc. (see additional detail below)

A current-year Class C **net construction** cost estimate should be provided as a separate project component for major facility construction projects (generally over \$500,000 in total project costs). Cost estimates are to be expressed by individual item as current-year direct costs and subtotaled in PMIS as current-year net construction cost. The preferred format and level of detail is Uniformat II, Level 2 Group Elements, for example - A10 Foundations. A detailed Uniformat II Work Breakdown Structure showing Level 2 with adaptations for NPS assets is available on the WASO Park Facility Management Division website at <http://inside.nps.gov/waso/custommenu.cfm?lv=4&prg=190&id=1939>. CESS-generated cost estimates for parent work orders use this format and are likely to be your best source of cost data. Some other Class C estimating data is also available on the WASO Construction Program Management website at <http://construction.den.nps.gov/guidance1.cfm>. Assistance in preparing cost estimates may be available through the Denver Service Center.

No adjustment factors, or “mark-ups,” should be hidden within the individual items listed in a net cost estimate; they must be shown as individual items. Appropriate adjustment factors that are standard for any net construction cost estimate include design contingencies (an estimator’s professional judgment about the probable cost of uncertainties associated with the present level of project decisions making), location factor, remoteness factor, standard general conditions, contractor overhead and profit and, if necessary for an older estimate, inflation escalation to the current year (preferably based on actual market cost data). Your estimate also should include adjustment factors that are based specifically on work to be done for the Federal government and the National Park Service, **not** just the usual factors applied to private-sector, commercial construction projects. These adjustments would include a Federal wage rate factor, government general conditions, contracting method adjustment and historic preservation factor. A sample Class C estimate showing the proper format and list of adjustment factors is available at http://workflow.den.nps.gov/staging/10_PublicForms/ClassCCostEst_3-14-06.xls. Assistance in reviewing cost estimates to address these issues may be available through the Denver Service Center.

A **net construction cost estimate does not include** pre-design, supplemental services, design, engineering or any other planning, design, or study costs! The costs of these items should be included in a separate project component or components that will likely vary by project size and fund source. A **net construction cost estimate does not**

include annual cost escalation to some future year, construction management costs, construction supervision costs, or a contingency reserve (a percentage of funding held in the project account for unforeseen events or modifications during construction)! The amounts estimated for these items may also vary by fund source and generally will be added during formulation to a major facility construction funding program through an automated grossing and escalation function tied to the program.

For each cost item, enter an item name, a brief description, quantity, unit of measurement and unit cost. Enter only numbers with or without decimals; do not use a dollar sign (\$) or commas or you will not be able to save your entry. PMIS automatically calculates the item subtotals and total component cost.

After completing an item of a Component Cost Estimate, you can choose to **Check Spelling** of information on the Project Funding Component Basic Information screen. Use the **Save and Add Item** button to save the information you just entered and then access a new field to enter another item in your cost estimate. If you choose **Save and Continue** instead, PMIS saves the information just entered and completes entry of the current project Funding Component and displays the Create/Edit Project Funding Component screen.

Warning: If you select the **Cancel and Exit** button, PMIS will display the Project Detail Sheet and **does not save** information just entered in the project Funding Component.

From the Create/Edit Project Funding Component screen you can create another project Funding Component by clicking the **Create New** button. Alternately, you can return to the Project Detail Sheet by clicking the **OK** button.



This is the final step in the creation of a PMIS project. Once you have completed your Project and Component data entry, the project is ready to begin the review process established at your park/unit.

Grossing and escalation of component cost estimates

A few programs, including Line Item Construction (LIC), FLHP and Alternative Transportation (ATP) use grossing and escalation as part of the cost estimating process in PMIS. The escalation function in PMIS computes and adds a projected adjustment of 4% of net construction costs per year to account for future construction cost escalation. The 4% figure is based on historical annual averages for all NPS construction projects over the last several decades. The escalation computation is based on the date of the estimate and the formulated FY as shown in PMIS.

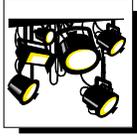
Grossing computes and adds an adjustment factor for construction management or supervision costs and possibly for a contingency reserve to cover contract modifications or other unanticipated changes during construction. The LIC adjustments are 8% of net construction for construction management, and 10% of net construction for a contingency reserve per the NAPA guidelines. FLHP uses a higher construction management adjustment but has no contingency reserve based on historical Federal Highway Administration standards and practices. Grossing and escalation are effective at time of funding component formulation and are shown as individual lines at the bottom of the PMIS component cost estimate. When a funding component is reformulated to another FY in the same funding program or to a different program, the component grossing and escalation costs are recalculated automatically.

Keep your cost estimates up to date. If a component is scheduled to be funded in the current FY, you can revise/update cost estimates of formulated components if needed. Ask your regional program lead to have the component cost estimate section marked "Needs Edit." Don't wait until the contract is awarded.

Without grossing and escalation, parks must revise costs annually. This is especially important for construction projects since there are large fluctuations in materials costs from year to year. Until all program areas are better aligned with PMIS processes and business practices, the NPS is accommodating our cost estimating needs through a combination of manual updates and automatic grossing and escalation.

Cost estimating is a specialized field. Even professional cost estimators who complete cost estimates every day as their primary job make mistakes. After completing your Funding Component Cost Estimate you will be recognized by your peers as a "Smokin' PMIS Power-User."





Closing the Loop in PMIS – Project Accomplishment

Objective 5. Understand the importance of “closing the loop” of a PMIS entry through Status and Completion Reports

How are PMIS Status and Completion Reports used?

PMIS data entry doesn't end following identification of a project need and securing project funding. The PMIS status and completion report information is used to report project funding component information to internal and external stakeholders. This enables the NPS to defend and/or justify money spent to date and demonstrates the return on investment from the work accomplished. In turn, this readily available information minimizes the need for short turn-around reports from project or field managers by providing regions and WASO with current and accurate information.

The information provided by parks in Status and Completion Reports is used by the WASO Program and Budget offices to create numerous formal reports to DOI, OMB and Congressional stakeholders. An example is the Waidman Report, which requires the NPS to show the status of all PMIS deferred maintenance projects worked on in the last 5 years. The entry of status and completion reports may also be tied to future funding distributed by some regions and NPS programs. For example, the Cultural Resources program withheld FY 2006 cultural resources project funding from all parks where prior year status and completion reports were not entered. Additionally, the Southeast Regional Office withheld FY 2006 project funding for all programs from parks who failed to enter prior year status and completion reports. This practice is expected to continue for these two areas in FY 2007.

Status and completion reports conclude the theoretical “lifecycle” of managing a project or need. When you enter a park need into PMIS as a project, you describe a compelling justification for doing the project and identify the measurable results you will use to gauge whether or not you are successful. In your status and completion reports, you document whether or not you accomplished the quantified project outcomes you outlined in your measurable results. This action closes the book on your project.



The PMIS development team took the old 10-174 & 10-174A completion report forms and used them as a model for a simplified and automated reporting mechanism in PMIS. The status codes in the Status Report came from Budget Guidance Attachment G questions and other requirements, but the names were then tweaked to make them more comprehensive to address the needs of both facility and non-facility projects.

PMIS Accomplishment Reporting

Parks need to report accurately on what's been accomplished to allow the NPS to show how PMIS has helped achieve improved management performance. **PMIS accomplishment reporting consists of Component Status Reports and Component Completion Reports.** Status and Completion Reports provide parks, regions and WASO a means to obtain timely and accurate information about progress made on Funding Components. Timely and complete reporting enables the NPS to defend and/or justify money spent to date and demonstrate the return on investment from the work done. **Data for the Status and Completion Reports should be furnished and entered in PMIS by the person most familiar with the work, typically the project manager.** When park project managers maintain current, complete and accurate information in the Status and Completion Report sections of components, regions and WASO program managers can respond to inquiries for information without requiring additional reporting by parks with short turn-around deadlines.

Photos, diagrams, drawings and text images from NPS Focus may be linked to PMIS Status and Completion Reports. Attaching photos to status and completion reports is an especially effective method to document project progress and the final outcome. NPS Focus can also be used to link to a longer more comprehensive completion report or a written product of the project such as a Historic Structures Report. Up to two images can be linked to each status report. There is no limit on the number of status reports which can be associated with each component. Only one image can be linked to the completion report. Only one completion report can be associated with each component. Please see Appendix B to learn more about how to link NPS Focus items to accomplishment reports.



The Status Report icon **Status Report** is activated on the Component header of the Project Detail Sheet after a funding component is marked funded and has a valid PWE account number. Once a Status Report is marked with a completion status of "Component Work Completed on Component Completion Date" and the Component Completion Date has been entered and saved, the Completion Report icon



Completion Report is activated on the Component header of the Project Detail Sheet. To enter a Completion Report simply click on this icon. Completion Reports must be done after all work on a Funding Component has finished. PMIS automatically fills in a number of fields in the Completion Report, some of which you are able to modify.

A good Completion Report includes a comprehensive narrative that relates accomplishments and final expenditures to the original PMIS project request. In addition, you must also identify the financial obligations by Budget Object Class breakdowns for each account number listed on the Project Funding Component, as well as identify any contract number(s) associated with each account.

The Status Report and Completion Report can be exported into an NPS completion report MS Word document (Form 10-174) or an MS Excel spreadsheet to track progress made on Project Funding Components attached to a specific project. The data in these documents can be moved into other reports or software as part of umbrella reporting from multiple systems.

PMIS Business Practice on Accomplishment Reporting

- An initial Status Report should be completed within one year from the point in which a component is marked funded. Numerous programs, e.g. (repair/ rehab, recreation fee, etc.) require Status Reports to be entered more frequently, i.e. quarterly.
- PMIS Component Status Reports should be updated whenever a significant project milestone is achieved, e.g. the status changes, a change or delay from the planned work schedule is encountered, a significant construction stage has been completed, etc.
- Ideally, the project manager should update the Component Status Report on a quarterly basis. Updating a Component Status Report typically shouldn't take more than 10-15 minutes.
- PMIS Component Completion Reports should be completed by the project manager within 30 days from the point in which work on a component is deemed "complete." The PMIS Task Force has defined component completion as "when one or more of the following conditions are met: (1) all money is expended, and/or (2) work is substantially completed and/or there is beneficial occupancy/use." As performance reporting becomes ever more important to NPS, the accurate current project status becomes more critical. This is a year round concern – not just the end of FY; do not wait until the SCC window to enter them. Completing a Component Completion Report typically shouldn't take more than an hour.

How to complete a Funding Component Status Report

Screen view when you click on the Component Status Report icon:

You must complete 7 steps as part of PMIS Status Reporting:

1. Enter the **Component Start Date** in (month/day/year) format. If the Component Start Date needs to be changed at any time and there are already one or more Status Reports in the system, the change must be made by editing the *original Status Report*. After this correction has been made, it is carried forward on subsequent Status Reports.
2. Enter the **Planned Completion Date**, also in (month/day/year) format.
3. Enter the **Date** and **Completion Status as of** the date that you enter the Status Report data. The Date again is entered in (month/day/year) format. To enter the Completion Status, you must click on one of the 6 radio buttons that best describes the current Status:

- Component Not Started
- Planning/Design Underway
- Contract Pending
- Contract Awarded
- Work Started
- Component Work Completed

Note: Upon completion of all work covered by this funding component – you must select “Component Work Completed on Component Completion Date” and also enter the **Component Completion Date** in format. Once you select this radio button and enter a completion date, and then click the **Save Changes** button, PMIS automatically will activate the Component Completion Report icon and bring you to the Component Completion Report screen.

4. You must next **confirm the work is proceeding as planned, or identify a reason for change or delay from the planned work schedule** by selecting one of 10 radio buttons from a pick list:

- Work proceeding as planned
- Delayed due to unforeseen site conditions, disputes, compliance, weather, labor shortage or concealed conditions
- Schedule change due to bidding process, external factors or priority change
- Cost increase due to differing site conditions, higher bids or higher labor, scope change, materials and/or equipment
- Work completed with other funds (e.g. ONPS base, partnerships, etc.)
- Emergency replacement project – cite the listed project that has been displaced (in the Status Reports comments field immediately below this pick list)
- Replacement project for other than an emergency

- Work no longer needed to be accomplished and was cancelled after it started
- Work deferred because funding reallocated for emergency work
- Other

If the work is proceeding as planned, no comments are required in the associated Schedule Change/Delay Explanation box. If any of the other 9 radio buttons are selected, you must briefly explain the reason for the change or delay from the planned work schedule.

5. Describe any project milestones that have been reached since the previous Status Report was entered, in the **Comments** box. You might describe the status of planning or design, contract(s) that have been awarded, construction stage that has been reached and any unusual conditions that were encountered, resource data collection that has been completed, etc. *Comments do not need to be extensive, but this field should not be left blank. The purpose of the field is to document to auditors that work is progressing and that tangible, quantified outcomes have been achieved. It's an essential element of performance measurement.*
6. The penultimate step is to enter the **amount obligated to date** (the account number is shown for your reference). Get the most current financial data from AFS3 through the park's Budget Office as necessary. Do not use commas or the \$\$ sign when entering the amount obligated to date.

If the estimated cost of the work covered by the funding component has changed, you may *optionally* enter a revised estimated cost. Do not use commas or the \$\$ sign when entering the revised estimate.

7. When you are satisfied with data that you have entered, click the **Save Changes** button to record the data in PMIS. This will save the information entered and then redisplay the Component Status Report. If desired, you may first use the **Check Spelling** button to weed out any spelling errors in the text that you entered prior to saving the data. To continue using PMIS, click the **Exit Process** button.



8. Project Managers may click on the Add Image Link icon [Add Image Link](#) at the top of the Component Status Report screen and import a maximum of 2 images from NPS Focus that pertain to the work completed as of that Status Report.

After saving the Status Report data, the information that you entered will be displayed on the PMIS Project Detail Sheet at the bottom of the funding component, in the following format:

Component Status Report		
Last Reported Status Date: 03/15/2005	Last Reported Completion Status: Work Started	
Last Reported Planned Completion Date: 09/30/2004	Reason for change/delay from schedule: Delayed Due to Unforeseen Site Conditions, Disputes, Compliance, Weather, Labor Shortage, or Concealed Conditions	
Explanation for the change/delay from project schedule: Hurricane Ivan damaged the Gulf Breeze High School and other county schools which resulted in the cancellation of field trips.		
Comments:		
Last Reported Account Status as of 03/15/2005:		
Account	Amount Obligated	Revised Estimate
5320-4007-ICF	\$10,700.00	\$0.00

Funding Component Completion Report

Completion Reporting is designed to report the total cost and use of appropriated funds, to provide assurance that the funds were expended in accordance with the intent of the authorization (PMIS statement), to record the change in asset condition achieved as a result of expenditures, and to record in narrative form information of value concerning the work accomplished and any deficiencies. The information must be complete and accurate. For all projects, the Superintendent is responsible for certifying the report in PMIS. Data for the Completion Report should be furnished and entered in PMIS by the person most familiar with the work, typically the project manager. Financial data should be entered with the assistance of the park's Budget Officer.

Screen view when you click on the Completion Report Template icon:

The screenshot shows the PMIS web interface. At the top, there are navigation buttons: Log Out, Search, Process, Report, and Help. The user is logged in as Theresa L. Harper. The main content area displays the 'Component Completion Report' for project PMIS 101479A. The form includes the following fields:

- Park/Unit Name: Gulf Islands National Seashore
- Component Title: [Equipment for Field Work and Documentation](#)
- Project Title: [Equipment for Field Work and Documentation](#)
- Funded FY: 2004
- Funded Funding Source: Parks As Classrooms
- Component Start Date: 01/01/2004
- Component Completion Date: 07/30/2005

A callout box with the number '11' is positioned over the form area. The left sidebar contains a navigation menu with options: Log Out, Create New Project, Search Menu, Process Menu, Report Menu, Help Menu, Submit QA Report, and Read QA Report. A 'Do you know this?' section at the bottom left notes that a project in PMIS 6.2 comprises one or more items.

comprises one or more project funding components.

- A **project funding component** is a request that is expected to be satisfied by a single funding source in a single budget cycle. In previous versions of PMIS, a project had only one such component.
- For more information on terms, please see **Definitions** under **Help**.

Account# 5320-4007-ICF

Costs by Budget Object Class

1

Personal Service Cost (from AFS3)
\$ 0

Travel Cost (from AFS3)
\$ 0

Contract Work Cost (from AFS3)
\$ 0
Contract Number

Supply Cost (from AFS3)
\$ 0

Equipment Cost (from AFS3)
\$ 10700

Other Cost (from AFS3)
\$ 0

FMSS Work Order Numbers:

Brief Quantified Description of Final Product/Outcome [Size Limit: 4000 Characters]:

2

Through Park Pact at Gulf Islands National Seashore, Gulf Breeze High School advanced placement environmental science students increased their understanding and appreciation of the significance of the Seashore and shared their knowledge with elementary students. The Parks as Classroom funds were used to purchase digital cameras; LCD projectors, loupes for plant magnification, audiovisual carts; CDs; CD burner; environmental science trekkers; a dissolved oxygen probes; diskettes and guide books. As part of a cooperative partnership, the teacher and her students performed weekly observations of the flora and fauna in the Naval Live Oaks area of Gulf Islands National Seashore. Through use of digital cameras, loupes, probes and

As Built Drawing or Report#:

3

As Built Drawing or Report Title:

Location of Original As Built Drawing or Report:

As Built Drawing or Report Author:

Original Condition:

4

Non-Existant
 Obsolete
 Poor
 Fair
 Good

Condition at completion:

5

Removed/Demolished
 Fair
 Good
 New
 Replaced with New

Completion Report Updated By:

6

Theresa L. Harper (TLHARPER)
[read-only]

Completion Report Date:

7

03/25/2005 [mm/dd/yyyy]

Superintendent Approval Date:

8

03/15/2005

Superintendent Certification [fullname as signature]:

9

/s/ Jerry Eubanks [offline signature required]

10

Check Spelling Save Changes Exit Process

You must complete several steps as part of PMIS Completion Reporting.

1. Enter the **Costs by Budget Object Class** financial obligations for the funding component account number shown. Do not use commas or the \$\$ sign when entering the obligated amounts. You must enter a number in at least one of the 6 budget object class fields to be able to exit the PMIS Completion Report. The 6 budget object classes are:

- Personal Service Cost
- Travel Cost
- Contract Work Cost – If you enter any costs in this field, also enter the Contract Number
- Supply Cost
- Equipment Cost
- Other Cost

Note: When there are multiple account numbers for your funding component, the Costs by Budget Object Class data must be entered separately for each account.

2. Enter a **Brief Quantified Description of Final Product/Outcome** in narrative form in the comment field. Document information of value concerning the work accomplished, any deficiencies, scheduling problems encountered, and modifications that were required and the reason(s) therefore. The information must be complete, accurate and quantified insofar as possible. Do not enter the total cost of financial obligations in the narrative field, since this cannot easily be exported in PMIS Reports. Similar to the Status Report, the purpose of this field is to document to auditors that work was completed and that tangible, quantified outcomes have been achieved. It's an essential element of performance measurement.

3. For all construction projects and any others, as applicable, record the **As Built Drawing or Report Number**, the **As Built Drawing or Report Title**, the **Location of Original As Built Drawing or Report** and the **As Built Drawing or Report Author** in the four fields that are shown. These are *optional* fields, but data should be entered if applicable.

4. From the pick list, select the **Original Condition** of the asset. The condition may have been *Non-Existent*, or the asset may have been in *Obsolete*, *Poor*, *Fair* or *Good* condition. A disturbed resource would be marked as *Poor* condition. For a new research project, select *Non-Existent*. For facilities, the selection of original asset condition should be based on the FCI (Facility Condition Index) number generated by FMSS from the FMSS Parent Work Order identified for the funding component.

5. From the pick list, select the **Condition at Completion** of the asset. The asset may have been *Removed/Demolished* or *Replaced with a New* asset, or the asset may now be in *Fair*, *Good* or *New* condition. A restored resource should be marked *Good*. A completed research report would be *New*. For facilities, the selection of asset condition at completion should be based on the FCI (Facility Condition Index) number generated by FMSS from the FMSS Parent Work Order identified for the funding component.

6. The **Completion Report Updated by** field is generated automatically by PMIS based on the user rights of the person entering Completion Report data. No data

entry is required by the user.

7. Enter the **Completion Report Date** in (month/day/year) format.
8. In the **Superintendent Certification** box, enter the full name of the park Superintendent to certify that he/she has read a hard copy of the funding component Completion Report, or has reviewed it in PMIS and is satisfied with documentation. This certification should not be entered until the Superintendent has actually reviewed the PMIS Completion Report. Ideally this review responsibility should not be delegated, although in practice it has been. Reviewing the Completion Report prior to certification serves the useful purpose of keeping the Superintendent fully informed about park funded project work that has been completed.
9. Enter the **Superintendent Approval Date** in (month/day/year) format. Enter the date when the Superintendent actually certified the Completion Report.
10. When you are satisfied with data that you have entered, click the button to record the data in PMIS. This will save the information entered and then redisplay the Component Completion Report. If desired, you may first use the button to weed out any spelling errors in the text that you entered prior to saving the data. To continue using PMIS, click the button after clicking on .



11. Project managers may click on the [Add Image Link](#) icon at the top of the Component Completion Report screen and import an image from NPS Focus that shows the project upon completion. At this time only one (1) image can be imported into the PMIS Funding Component Completion Report.

After saving the Component Completion Report data, the information that you entered will be displayed on the PMIS Project Detail Sheet below the Component Status Report at the bottom of the funding component, in the following format:

Component Status Report

Last Reported Status Date: 07/30/2005 **Last Reported Completion Status:** Component Work Completed
Last Reported Planned Completion Date: 07/30/2005 **Reason for change/delay from schedule:** Work Proceeding as Planned
Explanation for the change/delay from project schedule:

Comments:

Hurricane Ivan damaged Gulf Breeze High School and other county schools which resulted in the cancellation of field trips. The high school students resumed their weekly trips to the Naval Live Oaks area in February 2005 and will complete their individual school projects about the natural resources at Naval Live Oaks.

Last Reported Account Status as of 07/30/2005:

Account	Amount Obligated	Revised Estimate
5320-4007-ICF	\$10,700.00	\$0.00

Component Completion Report



Component Account Costs By Budget Object Class (based on AFS3):

Account	Personal Service Cost	Travel Cost	Contract Work Cost	Contract Number	Supply Cost	Equipment Cost	Other Cost	Total Cost By Account
5320-4007-ICF	\$0.00	\$0.00	\$0.00		\$0.00	\$10,700.00	\$0.00	\$10,700.00
Total Component Account Cost								\$10,700.00

Component Start Date: 01/01/2004 **Component Completion Date:** 07/30/2005
Completion Report Date: 03/25/2005 **Created By:**
Change in Condition: Non-Existant TO New **Report Last Updated By:** Theresa L. Harper (Tharper) on 03/25/2005
As Built Drawing or Report Number: **As Built Drawing or Report Title:**
Location of Original As Built Drawing or Report: **As Built Drawing or Report Author:**
Superintendent Approval Date: 03/15/2005 **Superintendent Certification:** /s/Jerry Eubanks

Brief Quantified Description of Final Product/Outcome:

Through Park Pact at Gulf Islands National Seashore, Gulf Breeze High School advanced placement environmental science students increased their understanding and appreciation of the significance of the Seashore and shared their knowledge with elementary students. The Parks as Classroom funds were used to purchase digital cameras; LCD projectors, loupes for plant magnification, audiovisual carts, CDs; CD burner; environmental science trekkers; a dissolved oxygen probes; diskettes and guide books. As part of a cooperative partnership, the teacher and her students performed weekly observations of the flora and fauna in the Naval Live Oaks area of Gulf Islands National Seashore. Through use of digital cameras, loupes, probes and other equipment the students observed, studied, recorded, documented and shared data with their classmates and younger students. High school students presented PowerPoint programs to elementary students that ranged from the arduous migration of the Monarch Butterfly to the benevolence of snakes in the environment. These same students developed educational CDs on their scientific findings at the Naval Live Oaks area for elementary school teachers. They posted worksheets on plants, spiders, amphibians and reptiles on the school website <http://www.santarosa.k12.fl.us/teachers/zoobytes/>. In school year 2004/2005 the program has expanded with more units on arthropods, reptile, insects, etc. This experience has not only taught students about the invaluable natural resources of Gulf Islands, but improved relations between the community and the park.



A Picture is Worth 1,000 Words: Importing Images from NPS Focus

Objective: 6. Understand the importance of incorporating digital images, drawing, reports, etc. that relate to all stages of PMIS projects.



Add Image Link. You are able to click on the Add Image Link icon [Add Image Link](#) in five sections of a PMIS project record to import digital images from NPS Focus that help document the compelling need for your project. The Delete Image Link icon allows you to delete existing links to images in NPS Focus. Images can help document existing problems to justify funding, and after funding is secured, they can be used to document project progress and completed condition. The images can be digital photos or documents that have been scanned or converted to a PDF image file. You can link NPS Focus images to five sections of a PMIS project record:

- Project Justification field (2 images)
- Funding Component basic information – (1 image in each component)
- Additional Criteria – (2 images)
- Funding Component Status Report (2 images in each Status Report), and
- Funding Component Completion Report (1 image)

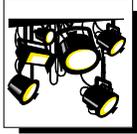


To search for images available in NPS Focus, click on the [Add Image Link](#) (Add Image Link) icon and PMIS will take you to a screen where you can enter a keyword to locate appropriate images associated with your PMIS number. After you enter the keyword, click the Search button and you'll see a list of image titles and types matching your search criteria; some will be images, others may be reports or drawings, etc. The functional "how to" import digital images from NPS Focus is included in the PMIS e-Course 2 and also Appendix A to this Participant Guide.

If you want to link an image to your project record, but it hasn't yet been loaded into NPS Focus, you'll first need to upload the image. You can upload images if you have obtained an account on the NPS Focus system, after completing the NPS Focus tutorial accessed through DOI Learning Manager about uploading and describing images and/or documents.

Why is it important to import digital images into a PMIS project statement?

A picture is worth a thousand words. Photo documentation of problems helps to convey and support why the project is needed, progress being made, and what was accomplished.



Closing Remarks

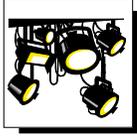
Three TELNPS courses on PMIS and the NPS budget process are planned for 2006. Dates and course titles are:

- 1.) April 26, 2006 PMIS Town Hall Meeting
- 2.) August 30, 2006 (live broadcast), October 17, 2006 (taped rebroadcast)
Understanding the NPS Budget Cycle: SCC;
- 3.) October 25, 2006 Creating an Effective PMIS Entry
- 4.) November 14, 2006 PMIS Town Hall Meeting (live rebroadcast)

The fourth course is a live rebroadcast of the April 2006 PMIS Town Hall Meeting. The instructor welcomes any advanced submission of questions on PMIS. She will also ask questions asked during the broadcast as time permits.

Thank you for participating in the How to Create an Effective PMIS Entry class. If you have further questions for the instructors, they may be reached at the following email addresses:

Ellen_Bullock@nps.gov
Carol_Maass@nps.gov
Roger_K_Brown@nps.gov
Geoffrey_Swan@nps.gov
Stacey_Hester@nps.gov



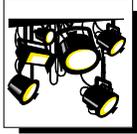
Appendix A: PMIS Status and Completion Report Tip Sheets

PMIS Status Report Tip Sheet

You must print the PMIS Status Report Tip Sheet on legal size paper to view it on a single sheet. ***This item will be addressed during our TEL session.***

PMIS Completion Report Tip Sheet

You must print the PMIS Completion Report Tip Sheet on legal size paper to view it on a single sheet. ***This item will be addressed during our TEL session.***



Appendix B: NPS Focus

How To: Linking to *NPS Focus Items*

PMIS allows you to link images related to your project and *Project Funding Component(s)* to the NPS Focus digital library. Images can assist in documenting needs for funding, and after funding they can be used to document progress and illustrate accomplishments. The images can be digital photos or documents that have been scanned or converted to an image file such as a PDF.

There are five sections of a PMIS project record that allow images to be linked:

- *Project Justifications* field (2 images)
- *Project Funding Component* Section – (1 image each)
- *Additional Criteria* – (2 images)
- *Status Report* (2 images each)
- *Completion Report* (1 image)

The NPS Focus link is available to users with editing rights for the sections of the project record which allow images to be linked. In those sections you would see two icons that are used to manage the links.



Add Image Link

The first icon allows you to add links to images in NPS Focus.



Delete Image Link

The second icon allows you to delete existing links to images in NPS Focus.

Adding a Link

You work at Big Cypress National Preserve and your park has experienced issues with inappropriate ORV trail usage. You previously created a project in PMIS based on the following information:

Funding was needed to provide a designated, stable, and sustainable trail system with fifteen designated access points for off-road vehicle (ORV) use within Big Cypress National Preserve. This project will be implemented over the next four years and will include providing approximately 400 miles of designated, stabilized trails for ORV use. This project is the result of a court-ordered settlement from a lawsuit between the NPS and plaintiffs in 1995. Approximately 22,000 miles or 80% of undesignated trails will be restored. Fifteen designated access points will be established

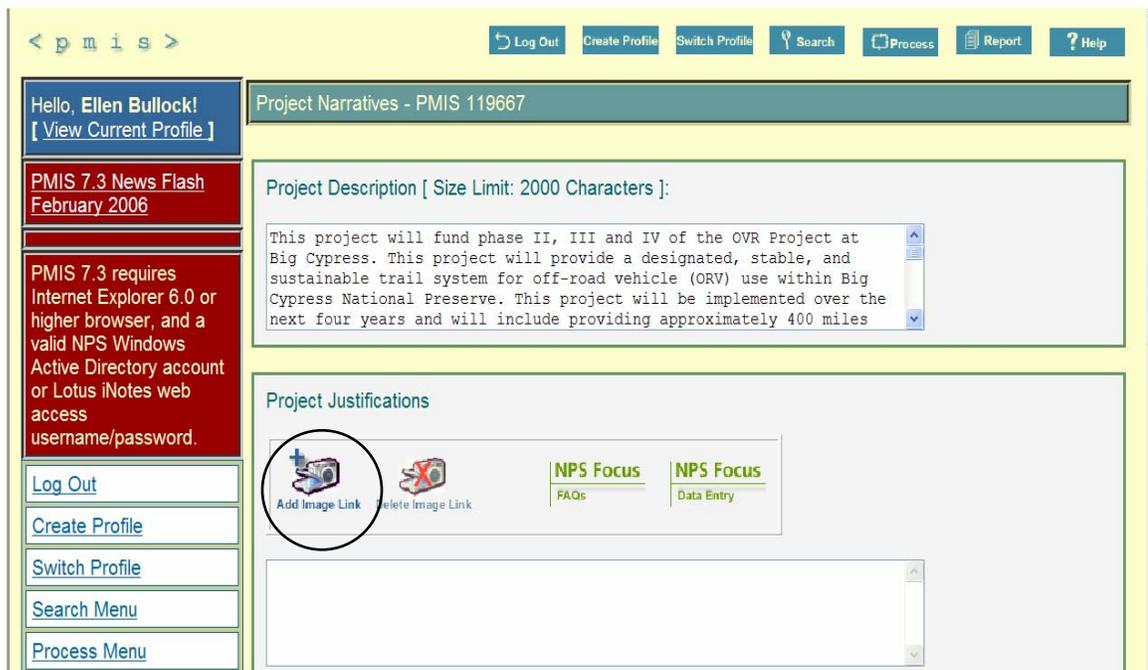
to enter the trail system. These access points will range in size from an area that accommodates ten truck/trailer combinations to forty. Trail hardening will range from a limited application of limestone rock over existing limestone caprock to applications of geotextile fabric with a limestone rock cover through areas where existing soil is over one foot in depth. Trails will range from ten to twelve feet wide and all trail beds will NOT extend above existing grade in order to maintain natural hydrological flow.

Because of the sensitive circumstances surrounding the establishment of a designated trail system in the Preserve, we will be leasing specialized equipment and hiring temporary staff to assist our maintenance roads and trails crew in this restoration effort. This will ensure that we will not cause further deterioration of the resource during this trail designation and restoration project.

You need to request follow on funding for this initiative. You have just learned about NPS Focus and feel your request would be strengthened if you understood how to add some pictures to depict the severity of the impact to the resource, etc.

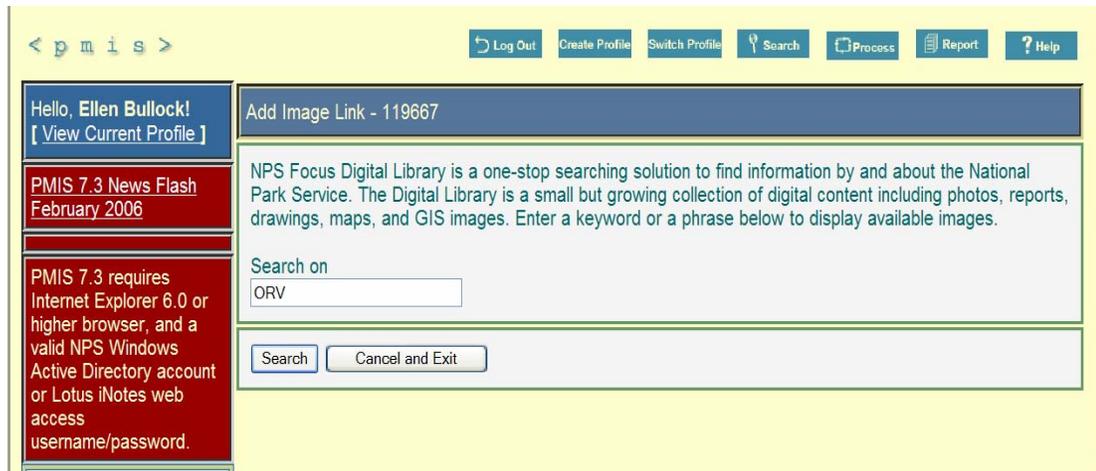
To a link an NPS Focus item to one of the five sections of PMIS, please follow the steps below:

Click on the *Add Image Link* icon.

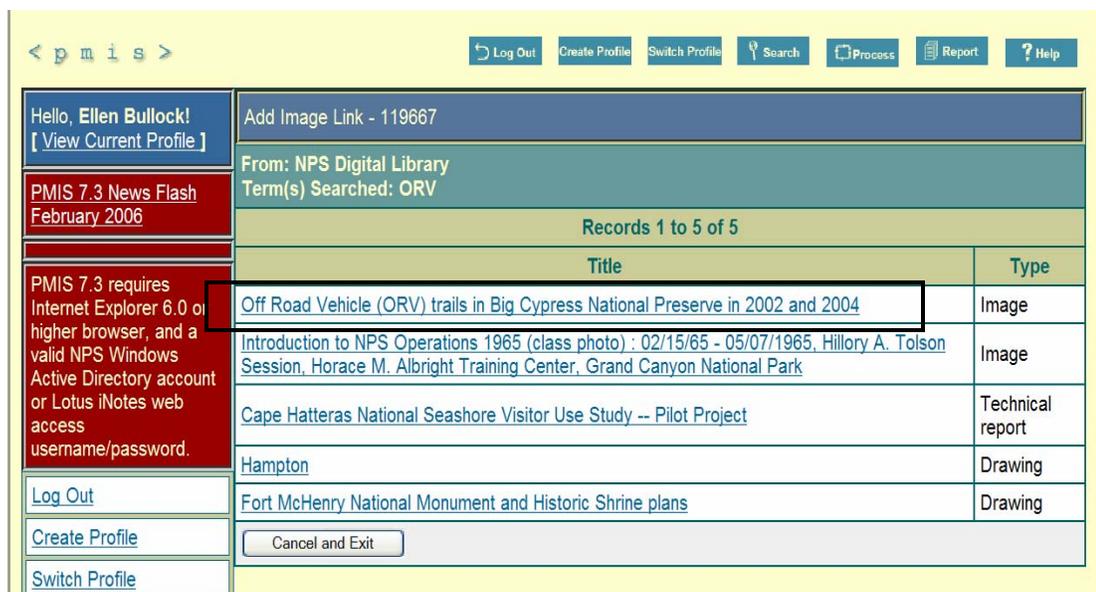


This action will cause PMIS will take you to a search screen that allows the user to enter a keyword to locate appropriate images.

After you have entered the keyword, in this case "ORV," **click** the *Search* button.



The system will display a listing of all of the NPS Focus records which match your search criteria. This listing contains the title of the NPS Focus item as well as the item's type. To start linking an image or document, **click** on its title on the Title column.



The system will then display a screen with all of the images, drawings, documents, etc. that are part of the "title" you selected on the previous screen. The user will also have the ability to view a brief synopsis of information associated with these items.

< p m i s > Log Out Create Profile Switch Profile Search Process Report Help

Hello, **Ellen Bullock!**
[View Current Profile]

PMIS 7.3 News Flash
February 2006

PMIS 7.3 requires Internet Explorer 6.0 or higher browser, and a valid NPS Windows Active Directory account or Lotus iNotes web access username/password.

[Log Out](#)
[Create Profile](#)
[Switch Profile](#)
[Create New Project](#)
[Search Menu](#)
[Process Menu](#)
[Report Menu](#)
[Help Menu](#)
[Submit QA Report](#)

Add Image Link - 119667



Off Road Vehicle (ORV) trails in Big Cypress National Preserve in 2002 and 2004

Summary: Images of unimproved ("social") Off Road Vehicle (ORV) trails showing associated natural resource damage, compared with images of designed trails and natural resource recovery, in Big Cypress National Preserve. The park estimated approximately 22,000 miles of social trails existed in the Preserve. They are for illustrations in a PMIS statement to fund phases II, III, and IV. Images taken in 2002 and 2004.

Contents: Pt. 1. Once a trail has been driven on 3 to 5 times it is abandoned because all the soft material is pushed out and the users are then driving on rough cap rock which will damage the machine. The users simply move over and create a new trail until they hit rock again and the process starts over. -- Pt. 2. Aerial photograph of social trails at Grouse Greese Prarie. -- Pt. 3. Designed trail showing recovery of adjacent vegetation. -- Pt. 4. Detail of new designed Buckskin Trail. -- Pt. 5. Detail of another designed trail.

Publisher: U.S. National Park Service
Restrictions: Public domain
Is Part of: Southeast Regional Office Digital Collection
Park name: Big Cypress National Preserve
Record No: 17643

If you want/need to see a larger version of the image you want to link, **click** on the corresponding thumbnail version of the image, drawing, document, etc.

NPS Focus
Digital Library

National Park Service
U.S. Department of the Interior



Create JPG sized up to:

- [Thumbnail](#)
- [600 x 600](#)
- [1000 x 1000](#)
- [1500 x 1500](#)

Download File:

- [JPG or TIFF Format](#)

Advanced Viewing as [MrSID](#)

Autoinstall [MrSID Plugin](#)



[Image Home](#)

- [Zoom In](#)
- [Zoom Out](#)
- [Pan Left](#)
- [Pan Right](#)
- [Pan Up](#)
- [Pan Down](#)

[Close image](#) and return to record

File Name: BICY-4bdfd9f0fc504516900e3cecc4882ba9.sid

NPS Focus software will be activated in a new browser window allowing you to enlarge the image and pan and zoom parts of the image. Once you are ready to return to the adding image link process, close the NPS focus window.

To link an image to your project record, select the image you want by clicking the radio button next to it and **click** the *Add Link* button. Upon the completion of this action, PMIS will return to the editing screen.

< p m i s > Log Out Create Profile Switch Profile Search Process Report Help

Hello, Ellen Bullock! [View Current Profile]

PMIS 7.3 News Flash February 2006

PMIS 7.3 requires Internet Explorer 6.0 or higher browser, and a valid NPS Windows Active Directory account or Lotus iNotes web access username/password.

Log Out Create Profile Switch Profile Create New Project Search Menu Process Menu Report Menu Help Menu Submit QA Report

Add Image Link - 119667



Off Road Vehicle (ORV) trails in Big Cypress National Preserve in 2002 and 2004

Summary: Images of unimproved ("social") Off Road Vehicle (ORV) trails showing associated natural resource damage, compared with images of designed trails and natural resource recovery, in Big Cypress National Preserve. The park estimated approximately 22,000 miles of social trails existed in the Preserve. They are for illustrations in a PMIS statement to fund phases II, III, and IV. Images taken in 2002 and 2004.

Contents: Pt. 1. Once a trail has been driven on 3 to 5 times it is abandoned because all the soft material is pushed out and the users are then driving on rough cap rock which will damage the machine. The users simply move over and create a new trail until they hit rock again and the process starts over. -- Pt. 2. Aerial photograph of social trails at Grouse Greese Prarie. -- Pt. 3. Designed trail showing recovery of adjacent vegetation. -- Pt. 4. Detail of new designed Buckskin Trail. -- Pt. 5. Detail of another designed trail.

Publisher: U.S. National Park Service
Restrictions: Public domain
Is Part of: Southeast Regional Office Digital Collection
Park name: Big Cypress National Preserve
Record No: 17643

Add Link Cancel

< p m i s > Log Out Create Profile Switch Profile Search Process Report Help

Hello, Ellen Bullock! [View Current Profile]

PMIS 7.3 News Flash February 2006

PMIS 7.3 requires Internet Explorer 6.0 or higher browser, and a valid NPS Windows Active Directory account or Lotus iNotes web access username/password.

Log Out Create Profile Switch Profile Search Menu Process Menu Report Menu Help Menu Submit QA Report Read QA Report

Project Narratives - PMIS 119667

Project Description [Size Limit: 2000 Characters]:

This project will fund phase II, III and IV of the OVR Project at Big Cypress. This project will provide a designated, stable, and sustainable trail system for off-road vehicle (ORV) use within Big Cypress National Preserve. This project will be implemented over the next four years and will include providing approximately 400 miles of designated, stabilized trails for ORV use. This project is the result of a court-ordered settlement from a lawsuit between the NPS and plaintiffs in 1995. Approximately 22,000 miles or 98% of undesignated trails will be restored. Trail hardening will range from a limited application of limestone rock over existing limestone caprock to applications of geotextile fabric with a limestone rock cover through areas where existing soil is over one foot in depth. Trails will range from ten to twelve feet wide and all trail beds will NOT extend above existing grade in order to maintain natural hydrological flow. Because of the sensitive circumstances surrounding the establishment of a designated trail system in the Preserve, we will be leasing specialized equipment and hiring temporary staff to assist our maintenance roads and trails crew in this restoration effort. This will ensure that we will not cause further deterioration of the resource during this trail designation and restoration project.

Do you know these?

- Concisely DESCRIBE WHAT the project is all about and WHAT is to be accomplished, WHERE, WHEN and HOW it is to be accomplished in Project Description.
- The PMIS description field is limited to 2,000 characters.
- Concisely and accurately JUSTIFY WHY this project is needed.
- Do NOT simply address program specific criteria in the justification.
- Measurable results should answer WHAT benefits will

Project Justifications

 Add Image Link
 
 Delete Image Link

[NPS Focus FAQs](#)
[NPS Focus Data Entry](#)

Measurable Results [Size Limit: 4000 Characters]

You can repeat this process if you are in a section of the PMIS project or component which permits the entry of more than one NPS Focus item.

[Log Out](#)
[Create Profile](#)
[Switch Profile](#)
[Search](#)
[Process](#)
[Report](#)
[Help](#)

Hello, **Ellen Bullock!**
[[View Current Profile](#)]

PMIS 7.3 News Flash
February 2006

PMIS 7.3 requires Internet Explorer 6.0 or higher browser, and a valid NPS Windows Active Directory account or Lotus iNotes web access username/password.

- [Log Out](#)
- [Create Profile](#)
- [Switch Profile](#)
- [Create New Project](#)
- [Search Menu](#)
- [Process Menu](#)
- [Report Menu](#)
- [Help Menu](#)
- [Submit QA Report](#)

Add Image Link - 119667







Off Road Vehicle (ORV) trails in Big Cypress National Preserve in 2002 and 2004

Summary: Images of unimproved ("social") Off Road Vehicle (ORV) trails showing associated natural resource damage, compared with images of designed trails and natural resource recovery, in Big Cypress National Preserve. The park estimated approximately 22,000 miles of socila trails existed in the Preserve. They are for illustrations in a PMIS statement to fund phases II, III, and IV. Images taken in 2002 and 2004.

Contents: Pt. 1. Once a trail has been driven on 3 to 5 times it is abandoned because all the soft material is pushed out and the users are then driving on rough cap rock which will damage the machine. The users simply move over and create a new trail until they hit rock again and the process starts over. -- Pt. 2. Aerial photograph of social trails at Grouse Greese Prarie. -- Pt. 3. Designed trail showing recovery of adjacent vegetation. -- Pt. 4. Detail of new designed Buckskin Trail. -- Pt. 5. Detail of another designed trail.

Publisher: U.S. National Park Service
Restrictions: Public domain
Is Part of: Southeast Regional Office Digital Collection
Park name: Big Cypress National Preserve
Record No: 17643

After you have successfully linked to one or more image(s) in the NPS Focus digital library, a thumbnail of each linked image will appear on the *Project Detail Sheet* with other data in the selected section of the project or *Project Funding Component*. It will also appear wherever else data is displayed for that section. You can also click on the thumbnail here to enlarge the image and pan and zoom parts of the image.

The screenshot displays the PMIS web interface. At the top, there is a navigation bar with links for Log Out, Create Profile, Switch Profile, Search, Process, Report, and Help. Below this, the page is divided into several sections:

- User Profile:** A blue box on the left says "Hello, Ellen Bullock! [View Current Profile]".
- News Flash:** A red box below the profile says "PMIS 7.3 News Flash February 2006".
- Browser Requirements:** A red box below the news flash states: "PMIS 7.3 requires Internet Explorer 6.0 or higher browser, and a valid NPS Windows Active Directory account or Lotus iNotes web access username/password."
- Navigation Menu:** A vertical list of blue buttons on the left includes: Log Out, Create Profile, Switch Profile, Search Menu, Process Menu, Report Menu, Help Menu, Submit QA Report, and Read QA Report.
- Project Narratives - PMIS 119667:** A teal header box at the top right of the main content area.
- Project Description:** A large text area with a title "Project Description [Size Limit: 2000 Characters]:". The text describes the OVR Project at Big Cypress National Preserve, detailing trail restoration efforts, including the application of limestone rock and geotextile fabric to stabilize trails.

nearby QA Report

Do you know these?

- Concisely DESCRIBE WHAT the project is all about and WHAT is to be accomplished, WHERE, WHEN and HOW it is to be accomplished in Project Description.
- The PMIS description field is limited to 2,000 characters.
- Concisely and accurately JUSTIFY WHY this project is needed.
- Do NOT simply address program specific criteria in the justification.
- Measurable results should answer WHAT benefits will

Project Justifications


Add Image Link


Delete Image Link




NPS Focus FAQs	NPS Focus Data Entry
-------------------	-------------------------

Measurable Results [Size Limit: 4000 Characters]

Check Spelling
Save and Continue
Cancel and Exit

Deleting a Link

You can delete images, drawings, and documents by using a similar process previously described in the addition. When you want to remove a link, **click** on the *Delete Image Link* icon.

Do you know these?

- Concisely DESCRIBE WHAT the project is all about and WHAT is to be accomplished, WHERE, WHEN and HOW it is to be accomplished in Project Description.
- The PMIS description field is limited to 2,000 characters.

Project Justifications

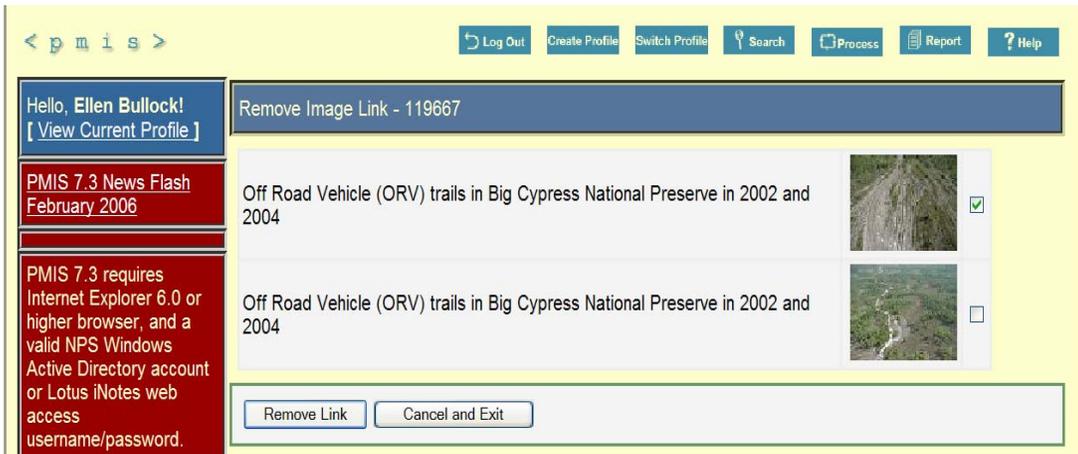

Add Image Link


Delete Image Link

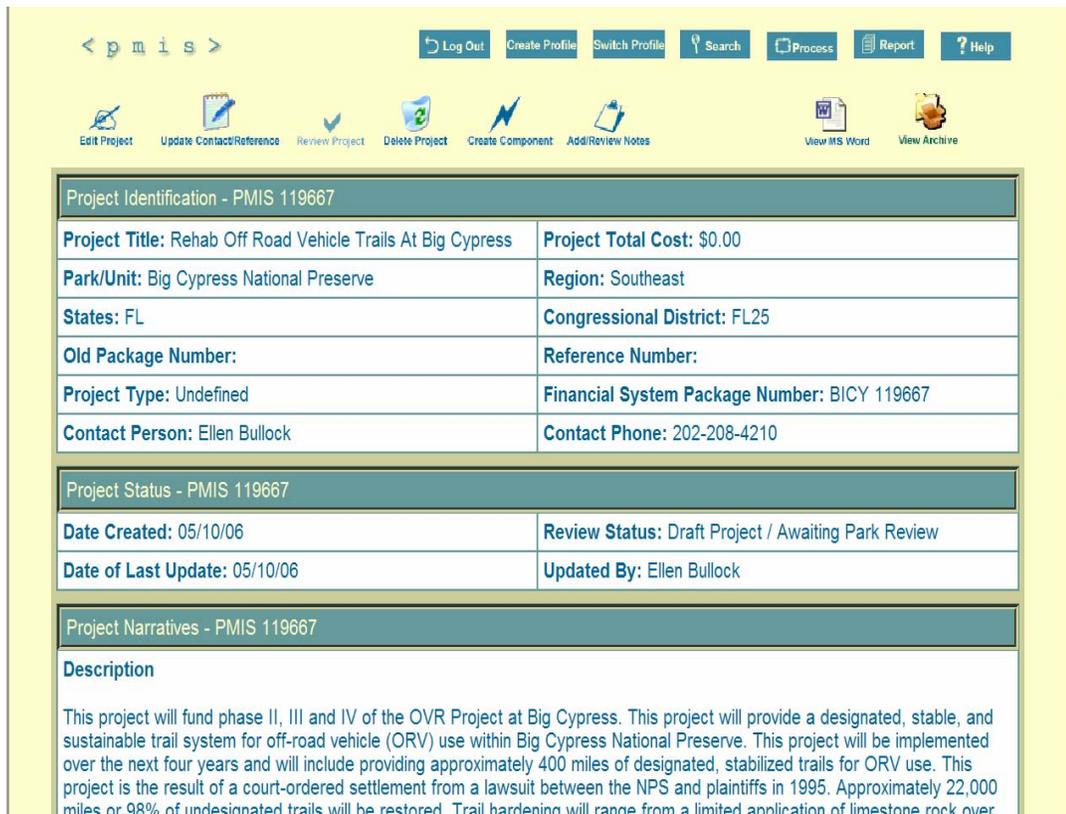



NPS Focus FAQs	NPS Focus Data Entry
-------------------	-------------------------

PMIS will take you to the *Remove Image Link* screen. To remove a link, **click** the checkbox next to the thumbnail and **click** the Remove Link button.



Click on the *Save and Continue* button at the bottom of the editing screen to save the changes you have made.



existing limestone caprock to applications of geotextile fabric with a limestone rock cover through areas where existing soil is over one foot in depth. Trails will range from ten to twelve feet wide and all trail beds will NOT extend above existing grade in order to maintain natural hydrological flow. Because of the sensitive circumstances surrounding the establishment of a designated trail system in the Preserve, we will be leasing specialized equipment and hiring temporary staff to assist our maintenance roads and trails crew in this restoration effort. This will ensure that we will not cause further deterioration of the resource during this trail designation and restoration project.

Justifications



IMAGE ABOVE - First photo shows resource damage caused by ORV users without a designated trail. Second photo shows a designated ORV Trail with vegetation, ruts and wetlands being restored due to the installation of the new designated trail. Off-road vehicle (ORV) use in the Preserve is resulting in significant resource damage. The damage consists of disturbed hydrology (sheet flow) and potential loss of critical habitat for 70 plants and 34 animals recognized as threatened or endangered species. The uncontrolled use of ORVs has resulted in scaring of the natural areas of the Preserve and creates potential danger for wildlife throughout.

If you don't want to modify the existing NPS Focus links, **click** on the *Cancel and Exit* button.

Obtaining Information on NPS Focus

If you have an image that you would like to link to your project record, but it has not been loaded into NPS Focus, you will need to upload the image to NPS Focus. You can upload images, if you have obtained an account on the NPS Focus system. To obtain an account you must complete the NPS Focus tutorial about uploading and describing images and/or documents. Images in NPS Focus can also be used in other NPS applications. The NPS Focus tutorial can be accessed through My Learning Manager or directly from the NPS Focus home page at: <http://focus.nps.gov>.

There are also two icons throughout PMIS which link you to information on NPS Focus.



This icon directs the user to the "help module" section of PMIS which provides PMIS users with the answers to frequently asked questions on NPS Focus.

< p m i s > Log Out Create Profile Switch Profile Search Process Report Help

PMIS 7.3 - NPS Focus Information

[PMIS Confidentiality Agreement](#) **How do I go to NPS Focus data entry to upload images or documents after I have an authorized NPS Focus account?**

[PMIS e-Course Info](#) [NPS Focus Data Entry](#)

NPS Focus Info **What is NPS Focus?**

[PMIS Newsflash](#)

[PMIS Definitions](#)

- [PMIS Activities](#)
- [PMIS Assets](#)

[PMIS Process](#)

NPS Focus is composed of two separate but integrated systems:

- The NPS Focus Digital Library is a state-of-the-art digital resource management system which can store images or documents. NPS Focus Digital library resources can be linked to PMIS projects.
- The NPS Focus Research Station is a one-stop searching gateway that allows users to search across numerous NPS systems and databases and external sites through a single web interface. The NPS Focus Digital Library is one of the systems that can be searched through the NPS Focus Research Station. The NPS Focus Research Station can be reached through a link from InsideNPS. The web address is <http://focus.inside.nps.gov> if you want to see how the searches work.

Who can link NPS Focus Digital Library images and documents to a PMIS project?

A PMIS user who can edit a section of a project or a component at a given time, can also attach a link to an image or document that is already in the NPS Focus Digital Library from that project or component section. PMIS will allow two links from the project justification area, one from the project component, two from the additional criteria, two from each status report, and one from a completion report.



This icon directs the user to the login in screen for NPS Focus so they can upload images, documents, drawings, etc. which they wish to attach to NPS Focus.

NPS Focus National Park Service U.S. Department of the Interior
digital library & research station

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Login to create or edit records

Home ■ Register New User ■ Forgot Password ■

User Name:

User Password:

NPS staff may register as a new user by:

1. Click on Register New User above and complete form
2. Follow [New User guide](#) to request system administrator to set permissions to authorize you to use the system (Will open in new browser window)

Contact System Staff: NPS_Focus@nps.gov

Exercise: Linking to *NPS Focus Items*

It is October 2005 and you work at the Chalmette Battlefield unit of Jean Lafitte National Historical Park and Preserve. Your unit was severely impacted by Hurricane Katrina. You need to seek funding to repair and reconstruct approximately 1,571 linear feet of historic brick border walls in the Chalmette National Cemetery. Seven separate sections of wall collapsed during Hurricane Katrina, displacing and scattering more than 100,000 bricks which are a safety hazard to pedestrian visitors and grounds maintenance operations. Additionally, approximately 3,400 of the grave markers in the cemetery were displaced, damaged, or destroyed. The park must replace the destroyed driveway and the security gates which are jammed in the closed position and do not function. Currently this cemetery remains closed due to the currently level of damage sustained.

Given this information, what could you add to the project/component in order to strengthen the request?

Answer: If pictures were taken or a report was written, you could link to these items if they have been uploaded to NPS Focus.

Below are some pictures that were taken of this real life Katrina situation. Should we integrate these as part of the exercise? How else would you propose that we do an exercise on the linking of NPS Focus items if we chose to not use this method?





