

Oregon Watershed Enhancement Board  
**Online Project Completion Report**  
*Helpful Hints and Guidance*

OWEB is pleased to offer online entry of most grant completion requirements via OWEB's Grant Management System (OGMS). These instructions are intended to make online entry easier and provide guidance for submitting completion report requirements for an OWEB grant. Most OWEB grant types will be able to use this new offering including, restoration, monitoring, technical assistance, outreach, effectiveness monitoring, plant establishment and small grants.

*If there is no reference to online reporting in the project grant agreement, the completion reporting requirements for that specific grant may be submitted via OGMS if the grant is a 208 funded grant or newer (i.e., OWEB grant numbers are 208-0012, 209-2012, 210-2012, etc.). Online reporting is applicable for all small grants. Please contact your OWEB Project Manager (e.g., Regional Program Representative) if you would like to ask about submitting completion materials for a specific grant.*

### OGMS Login Required

A unique grantee login id and password for [OWEB's Grant Management System](#) (OGMS) is required for online reporting. To obtain a login id, contact Leilani Sullivan, at (503) 986-0183 or [leilani.sullivan@state.or.us](mailto:leilani.sullivan@state.or.us).

*Please note that to accommodate multiple people submitting project completion requirements for the same project, a shared login and password should be created for a single grantee (e.g., one share login per watershed council).*

### Helpful Hints

#### Uploading Files

To accommodate submission of photos, maps, metrics forms, etc., OGMS has upload capability. This option provides users with the ability to attach documents, in a similar manner to attaching a document to an email. Additional detailed instructions will be provided on the upload page within OGMS.

Please note that depending on the internet connection speed being used; large files may take several minutes to upload. Read below for guidance on best practices for uploading certain file types. Microsoft also provides some general guidance on reducing file size. <http://office.microsoft.com/en-us/word-help/ways-to-reduce-file-size-HP005230740.aspx>

#### Uploading PDFs

PDFs with numerous pages, photos and graphics will be large in size.

If you have Adobe Acrobat Standard 8 or above, there is an option under 'Document' called 'Reduce File Size'. For Adobe Standard 7 or lower, there is an optimization option.

<http://www.adobe.com/designcenter/acrobat/articles/acr7optimize.html>

For Adobe Reader users, there are many free compression tools online. CNET is a popular technical website with free downloads that are rated by users.

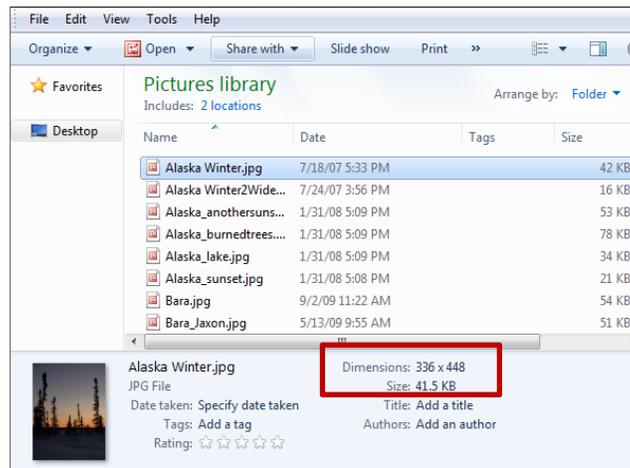
[http://www.cnet.com/1770-5\\_1-0.html?query=pdf+compressor&tag=srch](http://www.cnet.com/1770-5_1-0.html?query=pdf+compressor&tag=srch)

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**Uploading Photos – please upload images one at a time and do not use the zip folder compression method to package multiple photos together. In addition, photos inserted into PDFs or Word documents are discouraged because they become inaccessible to pull individually from the database for use by other applications.**

Prior to taking photos check the image quality on your digital camera. If the camera is set to the highest quality, the file size of the photo will be larger. You may want to adjust the settings accordingly based on the file size guidance that follows.

Check both the dimensions and the file size of photos prior to upload, it is recommended that an individual photo should not exceed 1mb (1000kb = 1mb). The following screen shot is from Windows File Explorer.



There is also guidance and free software online to reduce the file size of photos.

<http://graphicssoft.about.com/cs/digitalimaging/f/howreducesize.htm>

### Uploading and Creating Zip Files

The zip file format (e.g., .zip) is a data compression method. A zip file contains one or more files that have been compressed, to reduce file size. This option can be used for large documents (e.g., if PDF compression doesn't work) or to package multiple files together. **Please upload images/photos one at a time and do not use the zip folder compression method to package multiple photos together.**

Microsoft Windows XP (and newer) has a basic built-in zip capability. Additional guidance on how to create a zip file can be found on Microsoft's website.

<http://office.microsoft.com/en-us/infopath-help/zip-or-unzip-a-file-HA001127690.aspx>.

### Step-by-Step Instructions

**Please Note:** OGMS will timeout after 20 minutes of inactivity. To help reduce the risk of timing out of the system and losing data; data entry pages are separated by tabs in OGMS and each tab has a 'Save' and 'Save and Continue' button. Once you hit the 'Save' button (or 'Save and Continue' button), the clock will restart and you will again have a full 20 minutes. If you are concerned you won't be able to enter your information in the time allowed, or distractions will take you away from data entry, make it a habit to hit the Save button often. Or it is recommended that you first build your text entries in a text document (e.g., Microsoft Word) and then copy and paste into the text box in OGMS. Note however that text boxes will not retain formatting (e.g., indentation, bullets, etc.) from copied text.

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**Please note; use the browser Internet Explorer (IE) for best results**, we cannot guarantee functionality in other browsers. *If you are having issues displaying the webpage correctly and are operating in Internet Explorer 9, switch to compatibility mode. Click on the following icon in the address bar to switch to compatibility mode in IE9.*



*In addition, the optimal screen resolution for viewing OGMS is 1280x720 or better. If your resolution is below 1280x720 (e.g., the potential is high for laptops), some items may not fit on the screen or may overlap other items. To help reduce this problem, if viewing OGMS from a laptop, in IE you can change the zoom level in the lower right hand corner of a window or under Tools.*

**Getting Started**

From the OGMS main menu, select ‘Project Completion Reporting’, this link displays all the grants that are currently open for an individual grantee. Each column in the table addresses a completion reporting requirement; detailed instructions are available at each step within OGMS. **If all required fields are not populated you will not be able to submit your report – this can be checked by selecting the ‘Verify’ link, if requirements are missing they will be noted here.** You may refer to your grant agreement (Exhibits B and C) in advance of reporting to be prepared for what you will need to report on at completion of the project.

**Project Completion Report Status:**

If this field is blank the completion report has not yet been started.

*‘In Progress’* – some of the report may have been populated but it has not yet been submitted.

*‘Submitted’* – the report has been completed and is awaiting OWEB staff review. You will not be able to edit any of the submission when in this status.

*‘Requires Revision’* – OWEB staff have reviewed the submission and have requested changes or additions. At this point you can edit the report and resubmit when completed. You may view OWEB staff comments by clicking the ‘Comments’ link under the Comments column.

Once the report has been approved and the final payment has been made, the grant will no longer be available in the Project Completion Reporting menu as the project will be closed.

To begin each of the following steps, click on the associated linked text.

- You may work on your completion report over one or many sessions. From this screen, work your way through each column in the table beginning with ‘Completion Narratives’. There will be additional instructions within each link. For example, click on the ‘Uploads’ link to upload Before and After Photos and final metrics forms. Completion report requirements are outlined in Exhibits B and C of your grant agreement.
- After completing all requirements, click on the ‘Verify’ link to see if you are ready to submit. Once you have submitted a project successfully, check the submission status. The status will change from ‘In Progress’ to ‘Submitted’. After OWEB staff review, the status will change to “Requires Revision” if during OWEB staff review additional information or clarification is needed. A brief summary of the revisions needed are available by clicking the OWEB Comments’ link.
- If you find you have questions about the revisions needed, contact your [OWEB Project Manager](#).

Project	Project Name	Status	Project Narratives	Funding	Uploads	Metrics	View	Save/Print	Comments	Verify
<a href="#">07-10-009-8967</a>	Shepherd Ranch CREP Project	In Progress	<a href="#">Completion Narratives</a>	<a href="#">Project Funding</a>	<a href="#">Uploads</a>	<a href="#">OWRI Online</a>	<a href="#">View Entire Report</a>	PDF		<a href="#">Verify</a>
<a href="#">208-2034-5941</a>	Rock Creek Hatchery Fishway Construction	In Progress	<a href="#">Completion Narratives</a>	<a href="#">Project Funding</a>	<a href="#">Uploads</a>	<a href="#">OWRI Online</a>	<a href="#">View Entire Report</a>	PDF		<a href="#">Verify</a>

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1. **Completion Narratives** – text box entries; tab through and respond to each.

The screenshot shows a web interface for the Oregon Watershed Enhancement Board's Online Project Completion Report. At the top, there is a green header box with instructions: 'You MUST hit 'Save' or 'Save and Continue' before leaving each tab. If you return to the 'Completion Reporting' link (main menu for project completion reporting) without having hit save on each tab, you will lose any data entered on the tabs where you did not save your data.' It also states that all text boxes have an 8000 character limit, except for the Project Summary box which is limited to 1000 characters. Below the header is a navigation bar with tabs: Project Summary, Background, Description, Project Changes, Public Awareness, Lessons Learned, Recommendations, Habitat Guide, and Juniper Projects. The 'Project Summary' tab is selected. Below the navigation bar is a green box with instructions for the final project summary: 'Provide a final project summary that in 200 words or less describes what the project accomplished and what problem(s) it addressed. The information you provide will be used for accountability and reporting purposes and displayed for the general public. Please make a clear and concise statement; avoid jargon and acronyms. For guidance see [www.oregon.gov/oweb/grants/final\\_report\\_guidance.shtml](http://www.oregon.gov/oweb/grants/final_report_guidance.shtml)'. Below this is a large text input area. At the bottom of the text area, there is a note: 'The summary below is what was provided as the project summary in the grant application for this grant. This text box is enabled so you can copy from it - changes to it will not be saved'. Below the note is a sample text: 'This project will assist in achieving management plan goals set for this ranch land along an unnamed tributary to the Umpqua River to restore quality fish and wildlife habitat. This project will enhance work funded through the CREP and EQIP programs with installation of 1,800 ft. of livestock exclusion fence along the creek, six livestock water troughs and one new spring box.' At the bottom of the form are three buttons: 'Save', 'Save and Continue', and 'Spell Check'.

- All text boxes have a limit of 8000 characters (approximately 1300 words), with the exception to the Project Summary tab which is limited to 1000 characters (approximately 200 words). Please be concise.
- The project narratives displayed will change based on the grant type (e.g., the narrative tabs are different for a monitoring grant compared to a restoration grant).
- Each text box requires an entry. There are a few narrative tabs that first ask a question, if the answer is 'No' an entry in the text box is not required.
- The reporting format for small grants has been a final report template that requests these narratives in one summary format. Please note that we asking that you provide the same information but are now asking for it in distinct text boxes as we do for regular restoration grants.
- *Project Summary* – this is a fairly new (2011) reporting requirement. If this requirement is not stated in your grant agreement, we ask that you do please provide one anyway as we are required to provide a final completion summary for our reporting on grants to NOAA.
- *Special Conditions* – To identify if your grant has special conditions, see Exhibit B of your grant agreement. If the special condition can be addressed with a written response, enter that response in the text box. If you are required to submit a document such as a management plan or permit, upload that document on the Uploads page, a link to this page is provided within the Special Conditions tab.
  - Please only address those conditions in Exhibit B that are outlined under the **Project Completion Report** section.
  - Please use language in the text box similar to for example:

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- “To meet the special condition requirement 3(b) on Exhibit B below is the discussion of opportunities and barriers, if any, to permanent conservation of saved water instream.” (and then provide the discussion in the same text box).
  - “To meet the special condition requirement 3(c) in Exhibit B, I have uploaded a project map.”
    - You are not required to upload your final payment request and receipts, these should be sent to your project manager.
2. **Project Funding** – add each funding partner, the amount contributed to the project and the type of contribution. The data collected here mimics the hard copy form ‘Final Total Project Funding Match’ form. If there is no link in this column, there is no match requirement for that agreement.
3. **Uploads** – use this page to upload photos, metrics forms, project data, maps, attachments, permits, etc. Please note there are two tabs, one for Before and After photos and one for all other document types. There are additional detailed instructions on how to upload files on the OGMS Upload page.
- The following documents must be uploaded for the respective grant types before you can submit a final report. Please choose the appropriate descriptor from the ‘Select File Type’ drop down menu.
    - Monitoring /Effectiveness Monitoring – Final Metrics, Monitoring Data, and a Data Submission Confirmation.
    - Technical Assistance – Final Metrics, and Project Designs or an Action Plan or a List of Landowners.
    - Outreach – Final Metrics, and Outreach Materials or Informational Materials.
    - Assessment – Final Metrics and a copy of the Watershed Assessment document.
  - *At this time, the final payment request must still be submitted on paper to your project manager. Please do not upload your final payment request.*
  - If you wish to submit a supplemental final report to OWEB that includes additional information not collected in the text boxes, select the file type ‘Supplemental Final Report’. Formatted, high-quality final reports that go into detail about the project and outcomes are greatly appreciated and may be used as examples of accomplishments by OWEB.
4. **Metrics** - Oregon Watershed Restoration Inventory (OWRI Online for restoration grants) or Metrics Forms (non-restoration grants)
- OWRI Online - click on the link to begin your OWRI entry.
  - Metrics Forms – click on the link, download the appropriate form, fill it out and upload it via the Uploads page.
    - The Metrics Form requirement was implemented in March 2010. If your grant agreement was signed before this date you are not required to submit this form. However, OWEB is required to report the metrics collected in the form so we would greatly appreciate if you complete the form even if your grant agreement does not require it. If you do not provide it at project completion, OWEB staff may be contacting you to obtain the information at a later date.
    - We are working on online entry via OGMS for metrics and hope to incorporate that into Phase II of Online Project Completion Reporting.
5. **View Entire Report** – use this webpage to view a summary report of the data you entered.
6. **Save/Print** – this option creates a PDF that can be saved to your computer and/or printed. It includes an auto-generated header and footer with the grant number and printed date.
7. **Verify** – click on this link when all data have been entered. This option will verify all requirements have been met. Once verified you will be given the option to submit the final report.

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**8. Submit –**

- Enter the date that the final payment request was mailed to the OWEB project manager. You may enter a future date if the payment request has not yet been completed, however do note that approval of the completion report will not occur until the final payment request is received and approved.
- Provide a contact name and email address for the report. This contact information will only be used for communication regarding the report submitted.

Once the report has been submitted you will no longer be able to edit your completion reporting entries.

**What's Next**

1. An OWEB project manager will receive an email notification of your pending submission. If the project manager finds reason to require revisions to what was submitted, you will be notified via email and will be given the opportunity to log back into OGMS to edit your entries and resubmit.
2. Once the completion report materials have been submitted and approved by the project manager OWEB fiscal staff will begin reviewing the final payment request and will work with you or the fiscal agent to correct any problems.
3. Once the final payment has been made the grant is now complete. And,
  - a. The grant will no longer be visible on the Project Completion Reporting main menu.
  - b. The project status in OGMS will change from 'Open' to 'Complete' or if monitoring is required, 'Monitoring'.
  - c. The 'View Entire Report' and 'PDF' links will be available to all OGMS users on the grant detail page under 'Project Completion Report'.

**Questions?**

If you have questions about your final completion report requirements, please contact the OWEB Project Manager (e.g., Regional Program Representative) listed on your grant agreement. The Project Manager assigned to your grant can also be viewed on the project detail page within OGMS.

If you have comments, feedback or suggestions for improvements or if you are having technical difficulties with OGMS, please contact Cyrus Curry, at (503) 986-5371 or [cyrus.curry@state.or.us](mailto:cyrus.curry@state.or.us).