

# Annual Summary Report Refresher

12/6/16

Starts at 2pm

**GREEN** = Completed D&G (2015)

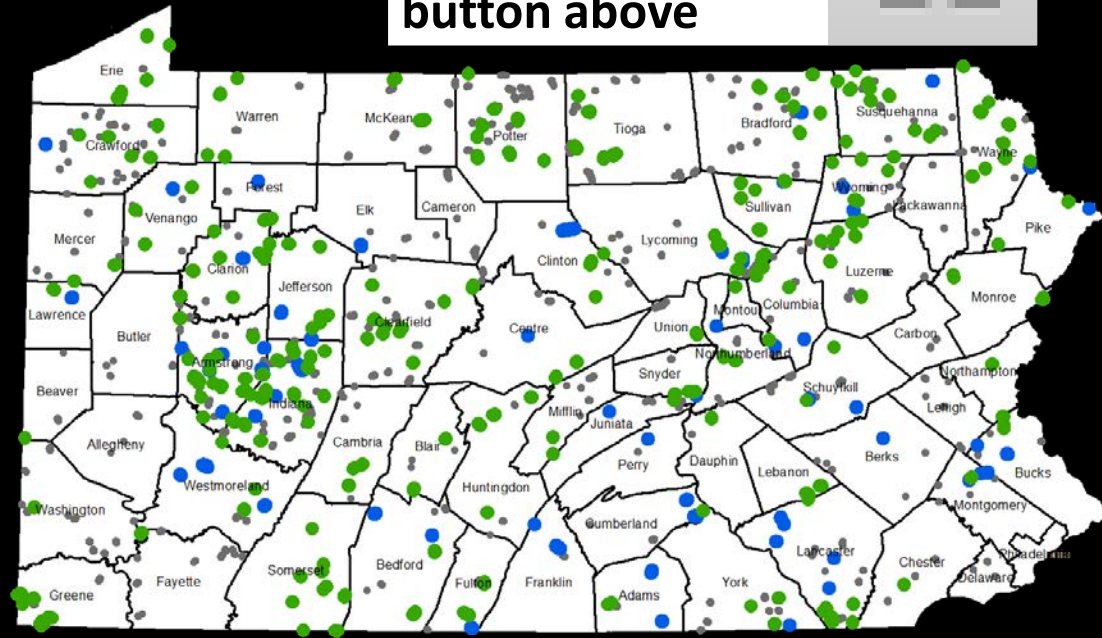
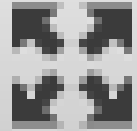
**BLUE** = Completed LVR (2015)

**GREY** = Contract

*(as of 2/26/2016, both D&G and LVR)*

Use Chat box to ask  
Questions

Toggle Fullscreen  
mode with this  
button above



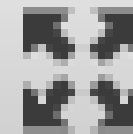
If you are reading this, then you are successfully seeing the webinar video. In addition to audio on the webinar, we have opened a phone conference line to allow attendees to listen and ask questions directly: **866-823-7699**. Please use either the webinar audio or conference line, but not both (will produce feedback).

**Audio also available via phone: 866-823-7699**

**For assistance, call: 814-865-5355**

Participant phone lines will be muted until after initial presentation

**Toggle Fullscreen mode with this button above**



**Use Chat box to ask Questions**

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## Purpose:

- Provide Conservation Districts with a “refresher” on completing the DGLVR Annual Summary Report, due 1/15/2017.

## Download:

- Annual Summary Report Guide

**DGRoads**  
DGLVR Program  
Customized GIS Interface

### Annual Summary Report Guide

12/2015

#### DIRT AND GRAVEL ROAD MAINTENANCE PROGRAM

#### A GUIDE TO SUBMITTING DIRT AND GRAVEL ANNUAL SUMMARY REPORT (ASR)

The PA State Conservation Commission requires all Conservation Districts involved in the Dirt and Gravel Road Program to submit a summary report each year. The Annual Summary Report (ASR) includes all data on projects, contracts, and administrative/education/admin/edu) spending. The ASRs are to be submitted to the Center for Dirt and Gravel Road Studies at Penn State. The Center will consolidate district reports and present them to the State Conservation Commission each spring.

Conservation Districts should submit their Annual Summary Report using the Program's DGRoads GIS reporting system. Files should be updated to reflect the current status of all completed and contracted projects.

**ASRs should be submitted by January 15 each year.**

**The Annual Summary Report consists of five steps:**

1. **Data Entry:** Enter updated information on any completed or contracted sites.
2. **Enter Admin/Edu Data:** Enter Administrative and Education Program expenditures for the year.
3. **Generate the Annual Summary Report and verify your numbers.**
4. **Complete the check list within the Annual Summary Report dialog.**

#### 1. DATA ENTRY

Enter data for all contracted and completed sites

##### COMPLETED SITES

1. Open the "Funded Sites Viewer", select the "Site Type" and create a worksite if necessary. Insure that worksite is in the correct year, and the location and length are correct.
2. Within the Viewer, click the "Edit Contract" button then click on the worksite to view/edit its data. Enter the contract information if necessary and save the changes.
3. In the top part of the form: Select "Completed" for Project Status and then open the Completion Report tab and enter the projects "Completion Date".
4. Complete the "Project Expenditures" and "In-Kind Contributions" to accurately reflect what was spent on the project. Line G (Total \$) must reflect the total D&G funds paid by the District on the project.
5. Complete the "Project Totals" to reflect the practices that were implemented on the site.
6. Save your changes and repeat on other worksites as needed.

##### CONTRACTED SITES

1. Open the "Funded Sites Viewer", select the "Site Type" and create a worksite if necessary. Insure that worksite is in the correct year, and the location and length are correct.
2. Within the Viewer, click the "Edit Contract" button then click on the worksite to view/edit its data.
3. In the top part of the form: Select the "Contract Date" and a "Road Owner" and insure that the Project Status is set to "Contract".
4. Open the Contract tab, enter a contract amount, and then save your changes to enable all the entry tabs.
5. Complete the remaining tabs as necessary.

**Tip:** Detailed help, including a description of all blanks on each form, can be accessed by hovering over a text box's label and by clicking the purple help icon located at the top right of all custom dialogs.

#### 2. COST AND EXPENSES ENTRY

Enter expense data for both D&G and LVR programs

1. Select "Cost & Expenses" from the "Reports" menu.
2. Select the "Funding Source" (i.e., Program), open the Cost and Expenses tab, and select the year to enter data.
3. If applicable, enter the Program's Administration and Education expenses. **MUST be greater than 0. If you do not know the cost, then leave the cost provided to you.**
4. Save the changes and then repeat these steps for the other "Funding Source".

#### ANNUAL SUMMARY REVIEW

Summarize and cost and expenses data

Select "Annual Summary"

Select the "Funding Source" (i.e., Program) and a Comprehensive County Summary will appear. Click through the various tabs and verify that the numbers provided are correct. You must review this file for accuracy before submitting your report. **For accuracy before submitting your report, double check \$ spent, insure all completed projects and current contracts are there. If anything is incorrect, exit the Annual Summary Report and enter the data using the appropriate tools.**

Verify your "Total Committed" (Contract Total + Expenses) and insure that the "Difference" (Contract Total + Expenses + Education) is greater than 0. Note that if you have not finished entering all of your "Report Checklist", check the boxes as completed as necessary. **Changes and then repeat these steps for the other "Funding Source".** If the "Difference" may be less than 0, send an email indicating that the ASR is ready for review to Ken Corradi (ken.corradi@psu.edu).

Developed with the financial support of the PA State Conservation Commission, for the Center for Dirt & Gravel Road Studies, Penn State University, 215 University Park, PA 16802. (Toll-Free) Phone: 1-866-668-6653, Fax: 814-863-1234

Go to our website at: [www.dirtandgravelroads.org](http://www.dirtandgravelroads.org)

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## Agenda:

- **Review of Annual Report Steps, with reference to guide and GIS**
- **GIS Demo of ASR steps**

## Annual Summary Reports

- Due from CD January 15, 2017.
- Summarize projects and spending through 2016.

from ASR Guide

**DGRoads**  
DGLVR Program  
Customized GIS Interface

## Annual Summary Report Guide

12/2015

### DIRT AND GRAVEL ROAD MAINTENANCE PROGRAM

#### *A GUIDE TO SUBMITTING DIRT AND GRAVEL ANNUAL SUMMARY REPORT (ASR)*

The PA State Conservation Commission requires all Conservation Districts involved in the Dirt and Gravel Road Program to submit a summary report each year. The Annual Summary Report (ASR) includes all data on projects, contracts, and administrative/education(admin/edu) spending. The ASRs are to be submitted to the Center for Dirt and Gravel Road Studies at Penn State. The Center will consolidate district reports and present them to the State Conservation Commission each spring.

**Conservation Districts should submit their Annual Summary Report using the Program's DGRoads GIS reporting system. Files should be updated to reflect the current status of all completed and contracted projects.**

**ASRs should be submitted by January 15 each year.**

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## Annual Summary Report

1. Enter all contracted and completed projects (D&G and LVR)
2. Enter annual Administrative and Educational spending
3. Generate Annual Summary Report and verify
4. Mark report as done in GIS, e-mail Ken.

**The Annual Summary Report consists of five steps:**

from ASR Guide

1. **Data Entry:** Enter updated information on any completed on contracted sites.
2. **Enter Admin/Edu Data:** Enter Administrative and Education Program expenditures for the year.
3. **Generate the Annual Summary Report and verify your numbers.**
4. **Complete the check list within the Annual Summary Report dialog.**

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## 1. Project Data Entry:

Enter all contracted and completed D&G and LVR projects.

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Enter all contracted and completed D&G and LVR projects.

**GIS Screenshot**

**Tool Overview**

- Identify:* Click on a site to identify it's id.
- Add/Move Site:* Opens the tool set to add a new funded site or move an existing site.
- Edit Site:* Opens the tool set to edit an existing funded site.
- Delete Site:* Click on the funded site you want to delete.
- Edit Contract:* Opens the tool set to add and edit contract data.
- Show/Hide:* Displays and hides this dialog.
- Legend:* View the funded sites legend of the currently selected site type.

## from ASR Guide

### **1. DATA ENTRY** Enter data for all contracted

#### **COMPLETED SITES**

1. Open the "*Funded Sites Viewer*", select the "Completed" tab, if necessary. Insure that worksite is in the correct location and length are correct.
2. Within the Viewer, click the "*Edit Contract*" button to view/edit its data. Enter the contract information and make changes.
3. In the top part of the form: Select "Completed" and open the Completion Report tab and enter the completion date.
4. Complete the "Project Expenditures" and "Income" to accurately reflect what was spent on the project and the total D&G funds paid by the District on the project.
5. Complete the "Project Totals" to reflect the project cost on the site.
6. Save your changes and repeat on other work sites.

#### **CONTRACTED SITES**

1. Open the "*Funded Sites Viewer*", select the "Contracted" tab, if necessary. Insure that worksite is in the correct location and length are correct.
2. Within the Viewer, click the "*Edit Contract*" button to view/edit its data.
3. In the top part of the form: Select the "Contracted" tab and enter the contract information and make changes.



## **2. Admin / Edu Spending:**

**Enter 2016 calendar year admin/edu spending**

## 2. Admin / Edu Spending:

Enter 2016 calendar year admin/edu spending

Costs and Expenses

Funding Source: Dirt and Gravel

Costs And Expenses Yearly Summary

Select Year: 2016

Program Expenses		Program Costs	
Administration: \$	2,500.00	Limestone Cost*: \$	15.50
Education: \$	2,500.00	<i>*average delivered (not placed) cost for your county</i>	
Total: \$	5,000.00		

Comments:

For both D&G and LVR

from ASR Guide

### 2. COST AND EXPENSES ENTRY

Enter expense data for both D&G and LVR programs

1. Select "Cost & Expenses" from the "Reports" menu.
2. Select the "Funding Source" (i.e., Program), open the Cost and Expenses tab, and select the year to enter data.
3. Enter the Program's Administration and Education expenses.
4. If applicable, enter the Program's Limestone Cost. Note that this cost MUST be greater than 0. If you do not know the cost, then leave the cost provided to you.
5. Save the changes and then repeat these steps for the other "Funding Source".

GIS Screenshot

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### **3. Generate ASR:**

**Generate report, and confirm numbers for D&G and LVR spending**

### 3. Generate ASR:

Generate report, and confirm numbers for D&G and LVR spending

from ASR Guide

#### 3. ANNUAL SUMMARY REVIEW Summarize and verify the worksite and cost and expenses data

1. Select "Annual Summary".
2. Select the "Funding Source" (i.e., Program) and a comprehensive County Summary will appear.
3. Click through the various tabs and verify that the numbers provided are correct. **You must review this table for accuracy before submitting your report (look for errors, double check \$ spent, insure all completed projects and current contracts are there).** If anything is incorrect, exit the Annual Summary Report and edit the data using the appropriate tools.
4. Verify your "Total Committed" (Contract Total + Completed Total + Administrative Expenses + Education Expenses) and insure that the "Difference" is greater than 0. Note that if you have not finished entering all of your site and expense data, the "Difference" may be less than 0.
5. Under the "Report Checklist", check the boxes as completed as necessary.
6. Save the changes and then repeat these steps for the other "Funding Source".
7. Once finished, send an email indicating that the ASR is ready for review to Ken Corradini (kjc139@psu.edu).

The screenshot shows the 'Annual Summary Report' window for 'Funding Source: Dirt and Gravel'. It features three tabs: 'Yearly Summary Report', 'Project Totals (2015 +)', and 'Project Totals (pre-2015)'. The main table displays data from 2005 to 2015. Below the table are three sections: 'ASR Overview (2016/2017)', 'Report Checklist', and 'Center Use Only'.

Year	Contracted Count	Contracted Total	Completed Count	Completed Total	Limestone Cost	Administration Expenses	Education Expenses
2015	0	0.00	0	0.00	16.90	0.00	0.00
2014	0	0.00	3	57,954.00	16.90	5,114.46	422.48
2013	0	0.00	1	12,000.00	16.90	1,279.82	440.00
2012	0	0.00	2	26,600.00	16.90	1,927.90	79.77
2011	0	0.00	2	29,990.00	0.00	2,016.01	523.06
2010	0	0.00	3	30,600.00	0.00	2,662.34	111.60
2009	0	0.00	2	27,885.86	0.00	1,891.72	152.77
2008	0	0.00	3	30,736.70	0.00	3,225.17	192.28
2007	0	0.00	3	47,472.00	0.00	1,667.36	0.00
2006	0	0.00	1	15,000.00	0.00	1,074.46	0.00
2005	0	0.00	2	30,500.00	0.00	16.82	391.00

ASR Overview (2016/2017)		Report Checklist		Center Use Only	
Total Committed: \$	563,858.66	<input type="checkbox"/>	All Funded Sites Entered	<input type="checkbox"/>	ASR Verified
Spending Req.: \$	568,905.00	<input type="checkbox"/>	Costs and Expenses Entered	Verified By:	
Difference: \$	5,046.34	<input type="checkbox"/>	ASR Completed	Verified Date:	

**3. Generate ASR:** Generate report, and confirm numbers for D&G and LVR spending

For both D&G and LVR

GIS Screenshot

Annual Summary Report

Funding Source: Dirt and Gravel | County: Adams

Yearly Summary Report | Project Totals (2015 +) | Project Totals (pre-2015) | All Contracts

Year	Contracted Count	Contracted Total	Completed Count	Completed Total	Limestone	Administration	Education
2016	3	161,804.60	1	14,167.63	0.00	0.00	0.00
2015	0	0.00	1	8,525.92	20.00	8,767.61	6,132.04
2014	0	0.00	0	0.00	12.25	2,000.00	2,000.00
2013	0	0.00	1	19,924.20	12.25	1,833.30	0.00
2012	0	0.00	1	32,501.59	12.25	1,666.70	479.85
2011	0	0.00	0	0.00	0.00	1,500.00	614.00
2010	0	0.00	0	0.00	0.00	1,346.76	201.41
2009	0	0.00	1	9,538.49	0.00	1,468.20	0.00
2008	0	0.00	1	15,322.63	0.00	226.39	460.04
2007	0	0.00	0	0.00	0.00	266.12	737.52
2006	0	0.00	1	10,966.78	0.00	115.88	613.69
2005	0	0.00	1	15,734.81	0.00	213.43	200.00

**ASR Overview (2017/2018)**

Total Committed: \$ 438,934.64  
 Spending Req.: \$ 376,275.00  
 Difference: \$ 62,659.64

**Report Checklist**

- All Funded Sites Entered
- Costs and Expenses Entered
- ASR Completed

**Center Use Only**

ASR Verified  
 Verified By:   
 Verified Date:

### 3. Generate ASR: Generate report, and confirm numbers for D&G and LVR spending

For both D&G and LVR

GIS Screenshot

Annual Summary Report

Funding Source: Dirt and Gravel | County:

Yearly Summary Report | Project Totals (2015 +) | Project Totals (pre-2015) | All Contracts

Year	Contracted Count	Contracted Total	Completed Count	Completed Total	Limestone	Administration	Education
2016	3	161,804.60	1	14,167.63	0.00	0.00	0.00
2015	0	0.00	1	8,525.92	20.00	8,767.61	6,132.04
2014	0	0.00	0	0.00	12.25	2,000.00	2,000.00
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Does that sound right? 3 D&G active contracts for \$161,804 and one project completed in 2016 for \$14,167

#### ASR Overview (2017/2018)

Total Committed: \$ 438,934.64

Spending Req.: \$ 376,275.00

Difference: \$ 62,659.64

#### Report Checklist

- All Funded Sites Entered
- Costs and Expenses Entered
- ASR Completed

#### Center Use Only

ASR Verified

Verified By:

Verified Date:

### 3. Generate ASR: Generate report, and confirm numbers for D&G and LVR spending

For both D&G and LVR

GIS Screenshot

Annual Summary Report

Funding Source: Dirt and Gravel | County:

Yearly Summary Report | Project Totals (2015 +) | Project Totals (pre-2015) | All Contracts

Year	Contracted Count	Contracted Total	Completed Count	Completed Total	Limestone	Administration	Education
2016	3	161,804.60	1	14,167.63	0.00		
2015	0	0.00	1	8,525.92	20.00	8	04
2014	0	0.00	0	0.00	12.25	2,000.00	2,000.00
2013	0	0.00	1	19,924.20	12.25	1,833.30	0.00
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more details

#### ASR Overview (2017/2018)

Total Committed: \$ 438,934.64

Spending Req.: \$ 376,275.00

Difference: \$ 62,659.64

#### Report Checklist

- All Funded Sites Entered
- Costs and Expenses Entered
- ASR Completed

#### Center Use Only

ASR Verified

Verified By:

Verified Date:

### 3. Generate ASR: Generate report, and confirm numbers for D&G and LVR spending

For both D&G and LVR

GIS Screenshot

Annual Summary Report

Funding Source: Dirt and Gravel | County:

Yearly Summary Report | Project Totals (2015 +) | Project Totals (pre-2015) | All Contracts

Year	Contracted Count	Contracted Total	Completed Count	Completed Total	Limestone	Administration	Education
2016	3	161,804.60	1	14,167.63	0.00		00
2015	0	0.00	1	8,525.92	20.00	8	04
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Does that sound right? 3 D&G active contracts for \$161,804 and one project completed in 2016 for \$14,167

more details

Spending Status

ASR Overview (2017/2018)

Total Committed:	\$ 438,934.64
Spending Reported:	\$ 376,275.00
Difference:	\$ 62,659.64

Report Checklist

- All Funded Sites Entered
- Costs and Expenses Entered
- ASR Completed

Center Use Only

- ASR Verified

Verified By:

Verified Date:



# 4. Mark Report as Complete

GIS Screenshot

Annual Summary Report

Funding Source: Dirt and Gravel | County:

Yearly Summary Report | Project Totals (2015 +) | Project Totals (pre-2015) | All Contracts

Year	Contracted Count	Contracted Total	Completed Count	Completed Total	Limestone	Administration	Education
2016	3	161,804.60	1	14,167.63	0.00	0.00	0.00
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2007					0.00	266.12	737.52
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**Mark ASR Complete**

### ASR Overview (2017/2018)

Total Committed: \$ 438,934.64

Spending Req.: \$ 376,275.00

Difference: \$ 62,659.64

### Report Checklist

- All Funded Sites Entered
- Costs and Expenses Entered
- ASR Completed

### Center Use Only

ASR Verified

Verified By:

Verified Date:

## Annual Summary Reports due 1/15/17

1. Enter all contracted and completed projects (D&G and LVR)
2. Enter annual Administrative and Educational spending
3. Generate Annual Summary Report and verify
4. Mark report as done in GIS, e-mail Ken.

## Help

1. **ASR Guide:** [www.dirtandgravelroads.org](http://www.dirtandgravelroads.org): General Resources, GIS
2. **In-GIS help:** 
3. **Contact Ken:** [kjc139@psu.edu](mailto:kjc139@psu.edu) 814-865-6966

# Live Demo