



# Plant Materials Operations and Management System User's Guide

**POMS Version 3**

December 2002

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## A. About the POMS Database

The POMS version 3 (POMSv3) Database replaces the following Plant Materials data collection systems:

- the POMSv2 database used in Fiscal Year 2001 through mid-September, 2002
- the ECS-008 Database used in Fiscal Year 2000
- the PMAAA data collection system used in 1997-1999 to collect ECS-008 data.

This POMS database is constructed entirely in Microsoft Access 97. Users do not need to be familiar with Access to use the POMS database.

POMSv3 was sent to PM offices from August through early October 2002 as databases were converted from POMSv2 to POMSv3. Significant changes in POMSv3 included:

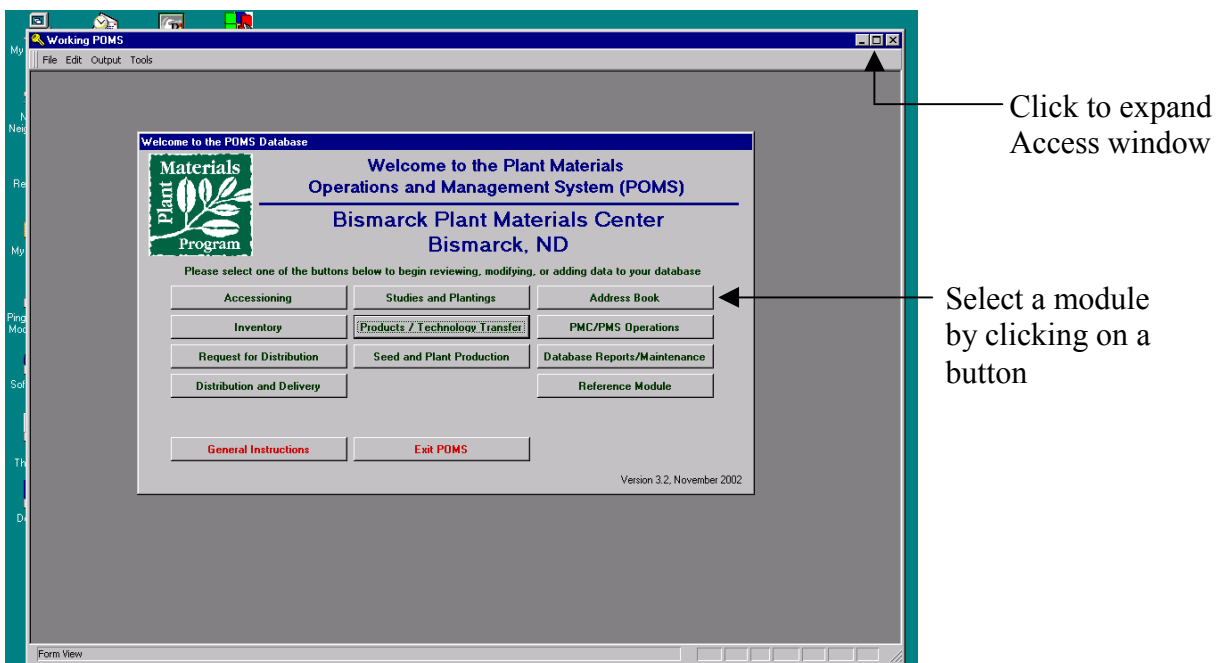
- conversion of Accessioning, Inventory, Request for Distribution (ECS-001), and Distribution and Delivery from PEAS to POMS.
- addition of modules to view PM Sites and PM Staff information, and a module to edit site Staff information and enter education and expertise.

## B. Optimizing your Monitor Settings for POMS

The data input screens are best viewed at a screen desktop area of 1024 x 768 pixels. Lower settings, such as 800 x 600 pixels, will still work but you will need to use scroll bars more often to see all the fields for data entry. To check or change your screen setting go to **Start**, then **Setting**, then **Control Panel**, and double-click on **Display**. Click on the **Settings** tab at the top of the screen. Under the **Desktop Area** box check the pixel size. You may change the Desktop Area to a higher setting by grabbing the slider bar and moving it towards More. When done click on **Apply**, follow any instructions on the screen, and click on **OK** if needed to close this box.

## C. Opening POMS and Getting Started

Open the database by opening MS Access, then finding the file in your directory (preferred method), or by opening Windows Explorer and double-clicking on the POMSv3.mdb file. Access will start and the Welcome form will come up. You may want to expand the Access window. You can select different modules by clicking on one of the buttons.



**Note: From October 1 through December 31 of each year, when you open POMS you will be asked to enter the Fiscal Year. This will allow you to enter data for the previous fiscal year, such as for Production or Time Spent to complete your ECS-008 data entry, or to add additional publications or presentations which occurred during the previous fiscal year.**

There are some general instructions found by clicking on the "General Instructions" button. There is currently only limited help within the database. Additional help will be provided in future versions and updates of the database. If you have questions please refer to this User's Guide for help.

You are now ready to use POMS. Select the buttons on the Welcome screen. Each button represents a different module of the database. Within each module are forms containing different sections related to the module. You may want to browse the database before entering data to orient yourself to the screens.

### D. General Information

This section applies to all modules and sections in the POMS database. Each module contains a record selection window and buttons for "Edit", "Add", "Delete" and "Save Record". Most modules have multiple tabs within the module which you will need to select and complete.

The screenshot shows the POMSv2 application window titled "POMS: Products and Technology Transfer". The main window is titled "Studies and Plantings" and contains several tabs: "Main", "Products", "Production", "Operations", and "Addresses". The "Studies" tab is active, showing a list of study records on the left and a detailed form for a selected study on the right. The list of studies includes columns for "Study Number" and "Study Name". The form for the selected study (MDPMC-T-0003-01) includes fields for "Study Number", "Study Name", "PMC/PMIS", "State", "Report FY", "Start Date", "End Date", "Status", "New This Year", "Primary Funding Source", "Purpose", "Study Type", "National Project", "Evaluation Dates", "Species", "Accessions", "Plots", "Native Species", and "Potential Releases". At the bottom of the form are buttons for "Edit a Study", "Add a Study", "Delete a Study", "Reopen a Closed Study", "Save Record", and "Help".

Annotations on the screenshot include:

- "Record Selection window" pointing to the list of study records on the left.
- "Multiple Tabs for data entry" pointing to the tabs at the top of the window.
- "Edit, Add, Delete and Save buttons" pointing to the buttons at the bottom of the form.
- "Click to expand Database window" pointing to the maximize button in the window title bar.
- "Use scroll bar if needed to adjust the window" pointing to the vertical scrollbar on the right side of the form.
- "Resize by Left-Clicking on the border and dragging the window to make it larger" pointing to the bottom-right corner of the window.

#### 1. Required Fields

You must complete all fields marked in Red for the record to be accepted by the database. Fields which have a gray background are locked and can never be edited. Please complete all fields in each module.

## 2. Editing and Adding New Records

When you enter a module all the fields are locked. Select a record from the Record Selection Window and then click on the **Edit** button to be able to edit the data. Click on the **Save Record** to save your data.

To add a new record, click on the **Add** button. The fields will be empty and you can start entering in data. Click on the **Save Record** button when you are done.

You do not need to add or edit all fields in a single session. You may go back to records by selecting the record and then clicking on the **Edit** button.

## 3. Speeding Up Data Entry

Many of the fields have lookup boxes. Click on the arrow to get a choice list and select one of the options. In nearly all cases you are limited to only the options in the choice list. In fields which have a choice list you may also start to type in the first few letters of a selection if you know it and the rest of the word should autoexpand and you can **Tab** to the next field.

Once you click in the first field you may **Tab** to the next field to speed up data entry.

## 4. Adding Programs and Activities data

The "Programs and Activities" tab contains reference information for Related Studies, SWAPA+H, NRCS Programs, and Resource Concerns. It is very important that this section is filled out as completely as possible as this information will be used to generate reports on how Plant Materials is benefiting conservation programs or addressing current resource issues.

## 5. Deleting or Modifying Subform Data

You have the option of deleting and modifying subform information, such as for SWAPA, Related Species, etc. Refer to the following figure on how to do this.

Click on the record you want to delete to highlight the record selector box. Then hit the "Delete" key on your keyboard to delete that specific record.

The screenshot shows a software interface with three tabs: 'Study Information', 'Programs and Activities', and 'Species and Releases'. The 'Programs and Activities' tab is active. It contains three main sections:

- SWAPA+H (select all that apply)**: A list of dropdown menus with options: Air, Animals, Plants, Soil, Water, and a blank field with an asterisk.
- NRCS Programs (select all that apply)**: A table with two columns: 'NRCS Program' and 'Percent'.

NRCS Program	Percent
CRP	15
CTA	25
EQUIP	10
EW/P	10
GLCI	10
- Resource Concerns (select all that apply)**: A dropdown menu with the option 'Buffers'.

An arrow points from the text on the left to the 'Animals' record in the SWAPA+H section.

You cannot modify the data in the cell. To change existing data you will need to delete the record you don't want and add a new record by clicking on the arrow box in the blank cell.

## 6. Use of Apostrophes in the Database

**\*\*\*Extremely important information\*\*\*** - Do not use an apostrophe ( ' ) anywhere in the database. You will be able to Save the record but if you try to Edit your data later you will get an Error Message.

## 7. Error Messages in POMS

There should be custom error messages which pop up if you have not completed required fields or entered data correctly. If you get a 'Run-time error' or other strange looking Access error message please write down what you did to get this error message and contact the PM Information Coordinator or POMS Programmer with the information. To get out of this error message click on **End** and then close out and reopen the database.

## **E. Module and Section Information**

POMS includes both Modules and Sections. Modules contain major areas such as "Studies and Plantings" and "Products/Technology Transfer". Within Modules are Sections. Sections within the "Studies and Plantings" Module include "Studies", "Field Plantings" and "Conservation Trials". Only those items which might raise questions on individual sections are covered here. In the future this information will be incorporated into help screens within the POMS database.

### 1. Studies and Plantings Module

- Status - If there is a Study, Field Planting, or Conservation Trial which is closed, you may select the "Closed" option and it will disappear from the choice list. If you want to list it back on your screen click on the "Reopen a Closed Study/Planting/Trial" button and follow the instructions. If you use this option instead of deleting a Study/Planting/Trial you will be able to maintain an archive record of all studies/plantings/trials you have completed.
- You must enter an Evaluation Date (Studies) or indicate that an evaluation was done (Field Plantings and Conservation Trials) to get credit for the Study, Field Planting, or Conservation Trial when your data is merged into the National POMS database.

### 2. Studies

- PMC studies are included in PMS databases. PMSs may also add their own studies to the database. PMSs may need the PMC study list in other places in the database. PMSs should not modify PMC study information unless coordinating with the PMC.
- Evaluation Dates - enter the dates the study was evaluated.
- When adding a new Study please use the study number format as described in the National Plant Materials Manual (see Page 540-52).

### 3. Field Plantings

- Related Studies: PMSs should relate field plantings back to their PMC's studies as appropriate.
- When adding a new Field Planting please use the number format as described in the National Plant Materials Manual (see Page 540-58, 2nd paragraph on that page).

#### 4. Conservation Trials

- When adding a new Conservation Trial please use the number format as described in the National Plant Materials Manual (see Page 540-57, 4th paragraph on that page).

#### 5. Releases

- Only your PMC's releases are found here. To see all PM releases go to the "References" module and then to "All Releases".
- For **New Releases** enter in as much information and as many fields as appropriate. For **Pending Releases** anything other than Anticipated Year of Release: would be nice but is not required. For **Past Releases** you may wish to review and modify or fill in information as needed. This information will be used on the PM web pages in the near future so it is important that it is as accurate and complete as possible. An Environmental Evaluation for past releases is not required right now but will be required in the near future.
- Please update the status and anticipated year of release for Pending Releases.
- When a pending release is signed fill in the Year Released and Month Released fields and then uncheck the Pending Release box and clear the data in the Anticipated Year field.
- If you add a Pending Release, you must put something in the Release Name field. Unless you have had a name cleared with the NPMC, then do not put a name. Instead use "pending (XXPMC)", with your PMC abbreviation. If your PMC has more than one a pending release for species, then use "pending1 (XXPMC)", "pending2 (XXPMC)", etc.
- Release Common Name: If the local common name for the release is other than the common name in the PLANTS database then enter the local common name here.
- Environmental Evaluation: Please use the Environmental Evaluation (EE) worksheet for the release to complete this section. The values in the choice lists refer to the numbers you scored different elements on the EE. This information is important to complete in light of the emphasis being placed on invasive species.
- You cannot delete releases. Please contact the PM Information Coordinator if you need to delete a pending release.

#### 6. Release Production

- "Commercial" refers to production by commercial nurseries and seed producers and "PMC" refers to production by PMCs. The "Value" is the average cost of the materials on the commercial market.
- For seeding and planting rates use an average of accepted rates.
- Plant Materials Specialist should report production for ALL NRCS releases in the states they serve.

#### 7. Other Production

- Use this module to record any other production by the PMC. Enter in only totals based on intended use or stock type (vegetative production only).
- Data entered in FY2000 is currently unavailable at this time but will be loaded into each PMC's database in future versions of POMS.

## 8. Publications

- \*\*\*Please enter in any new publications for FY2001 or older publications which do not appear on the list. Please do not edit existing data. We are doing this at the national level and will take care of duplicates, misspellings, etc. at this point.
- \*\*\*You may check the "Archive only" field for any new or existing publications which you would like to keep in the database but for which might be outdated or inappropriate for the web site.
- Authors - The first PM author on the publication is the Primary PM Author, others should be listed as Other PM Authors.
- Publication Type: Refer to the report "Types of Publications" for help with this field. Please note that articles which appear in newspapers and magazines which were not written by PMC or PMS staff should be recorded as an Interview. Articles which appeared in a newsletter other than a PMC/PMS newsletter should be recorded as a Miscellaneous Popular Article. "AB" should be used only for published abstracts and "SY" should be used only for the published papers.
- Special Note: If you give a presentation at a professional meeting you could record the published abstract and published proceedings in the Publications module, and the poster or talk in the Presentations module, if applicable.
- Materials to NPMC: This is to help us track what gets sent for archiving and the web site. Your publications will be posted to the website much quicker if you fill in the electronic filename of the file sent to the NPMC. If you have sent a publication to the NPMC and this is not filled in please fill it in.
- Search Terms Fill in data for Main Subject, Species, and Releases but do not worry about adding keywords. We are working on a standard list of search terms which will be far more useful in searching publications on the web site and through the PLANTS database.

## 9. Presentations

- Complete the fields to report your presentations. Be as specific as possible.

## 10. Time Spent on Activities

- Record the percentage of time spent on each activity. Make sure the total is not more than 100%. Please be as accurate as possible.

## 11. Address Book

- This module can be used for all contacts the PMC uses. It will also be used for storing address information for D&Ds in the future. The Address Book can be a powerful tool for the PMC or PMS to store all addresses in one location and reduce duplication of efforts among staff members.
- As with any address or contact information, this data will need to be updated on a continuous basis as needed. The "Date Entered" and "Date Modified" fields may help you identify older records which need to be checked.
- \*\*\*Under the "Notes, Contact Type, etc." tab there is an area for entering Type of Contact. You may use this area to designate what that particular address is used for. You may designate each address with more than one code. There is a standard list of codes but you may add as many more codes as you need. Some examples of codes you may

wish to add include "Field Day", "Newsletter Mailing", "Supplier", "Grasses", "Wetlands", "National Park Service", etc. You can pull customized lists or mailing labels for each of these groups in the Reports tab of the module.

- Under the "Notes, Contact Type, etc." tab you will need to designate your Cooperators in the Type of Contact field. Only those addresses labeled as "Cooperator" will be available for you to use in the "Customer Assisted" section of POMS.

## 12. Customers Assisted

- Always start entering data in this section by choosing a Customer Type. If State appears enter a state code. This generates an appropriate list of NRCS offices (Field Offices or Other NRCS Offices) in the Affiliation field.
- Fill in all field as completely as possible. Information can be used for management purposes to identify the demographics of the customers we server as well as which NRCS Programs are receiving benefits.
- There is one slight glitch in the programming for this section which will be fixed in future versions of POMS. If you enter a persons name more than once and go back to try to edit the second or later record it will only show the first chronological record you entered. You may add data without a problem but once you hit "Save" you won't be able to see the record again. You can view the correct information in the Reports section by clicking on the "List of Assistance by Year" button.

## F. Reports

- Select the **Reports** tab in any of the Modules to generate and view a report. For reports which are dependant on the fiscal year you will need to enter the 4-digit fiscal year after you click on the report button. To print a report select **Output** from the menu bar, then **Print**. The print screen comes up and you can select a printer and print. If you have Adobe Acrobat (full version) you can print to a PDF file and save the file for printing or e-mailing later on.
- You can export a report to MS Word by selecting **Output** from the menu bar, then **Output Report to Word .rtf File**. This will launch MS Word and bring the information up in Word. Please note that some formatting, including lines, will be lost. Use this option if you want to be able to save the report as a Word document and be able to modify it later. When you save the document in Word you may want to save it as a .doc file instead of a .rtf file.
- The reports currently in the database are there mostly to generate something for the files or for you to view. If you have a suggestion for a report format that may be useful to everyone please contact John Englert. In the future there may be options for creating your own custom reports in Access or modifying existing reports.

## G. Maintaining your POMS directory

1. The following files should always be in your POMS folder:  
 POMSv3.mdb  
 Export-Empty.mdb
2. You may wish to keep the current electronic copy of the POMS User's Guide in this directory as well.
3. You may also want to create folders called "Export Databases" and "POMS Backup". You can move your Quarterly Export and ECS-008 Export databases into the "Export Databases"

Name	Size	Type	Modified
Export Databases		File Folder	12/8/02 1
POMS Backup		File Folder	12/8/02 1
Export-Empty.mdb	1,254KB	Microsoft Access Da...	12/2/02 4
POMSv3.mdb	34,386KB	Microsoft Access Da...	12/4/02 4

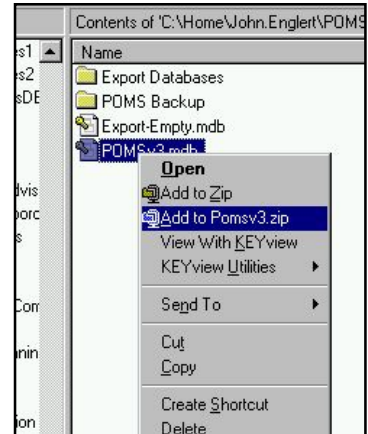


folder. You might want to keep these databases for up to one year from the date they are created. The POMS Backup folder can be used for backup databases you create occasionally for “safekeeping”.

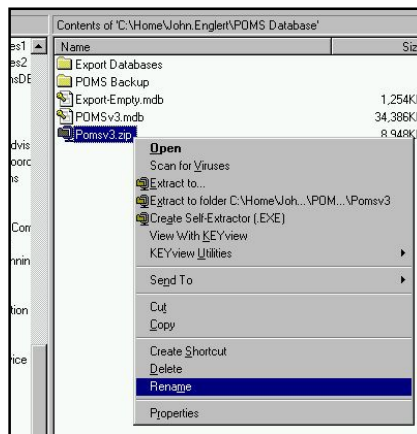
- Any other files in your POMS folder, such as Updates databases or old versions of POMS, can be deleted. (Only delete Updates databases after you apply the update.)

## H. Creating a backup of POMS

- You may wish to backup your POMS database at regular intervals or after sessions involving significant data entry or modification, e.g. entering commercial production information, updating physical seed and inventory, finishing quarterly data entry, etc.
- Open Windows Explorer, find your POMS database folder. In your POMS folder you should have the file “POMsv3.mdb”. Right-click on the file “POMsv3.mdb” and select “Add to POMsv3.zip” from the menu. This will create a backup of your POMS database called “POMsv3.zip”.



- Right click on the file again and select “Rename”. Rename your file to “POMsv3(date).zip” where ‘date’ is the date you create the backup.

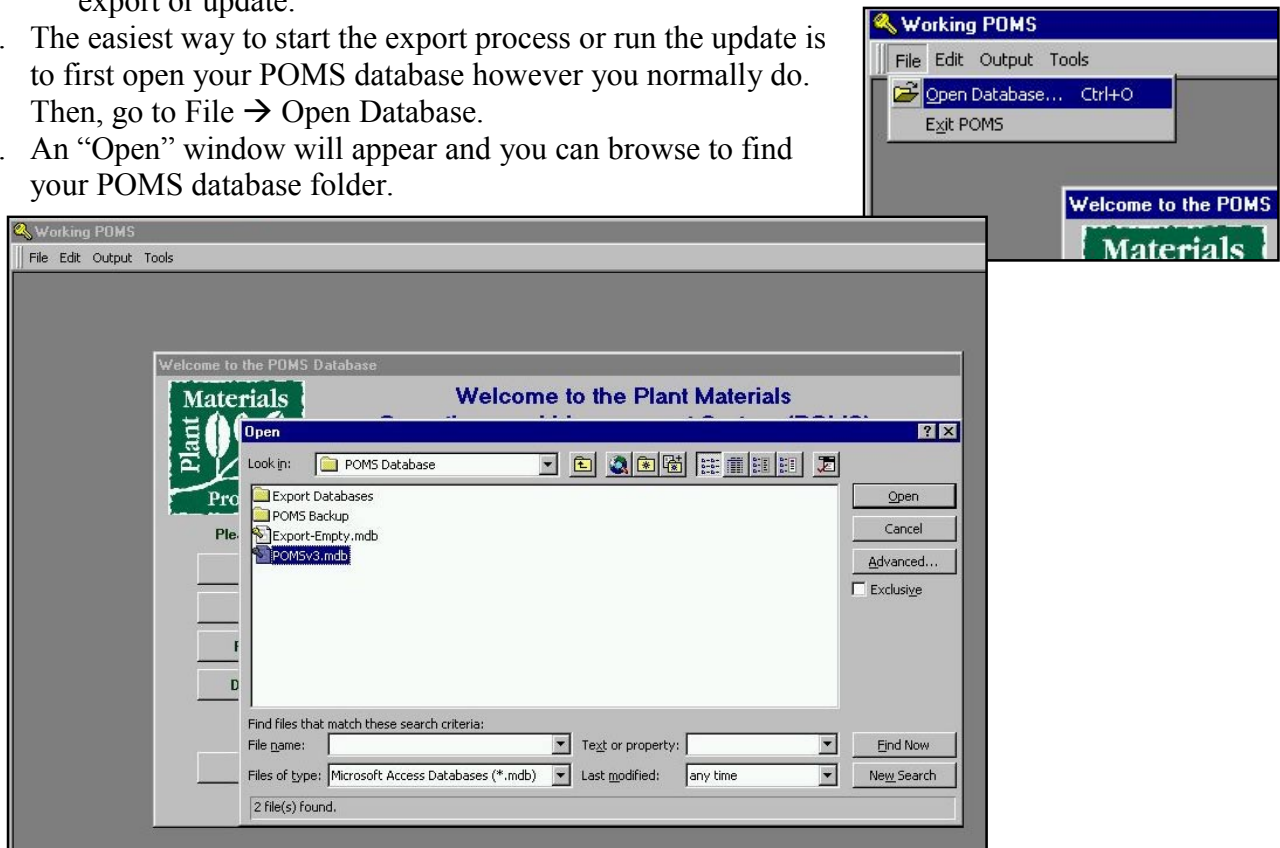


- Move the “POMsv3(date).zip” file into your POMS Backup folder. You might also want to move this file to another computer on your network, or copy the file to a CD or Zip disk. This is important in case the hard drive with your POMS database on it crashes.
- It is probably worth keeping at least the last 3-4 months worth of backups. When you create a quarterly export database and send it to the PM Information Coordinator, the information is incorporated into NationalPOMS and will in effect be archived nationally.
- In the event of a hard drive crash you can extract your POMS database from the most recent POMS zip file. If you do not have a backup zip file, you can contact the PM Information Coordinator or NPMC Manager to obtain a copy of your POMS database. However, this database will only be current as of the last quarterly export you performed, and should only be used as a last resort to restoring your POMS database.

## I. Performing Exports and Updates

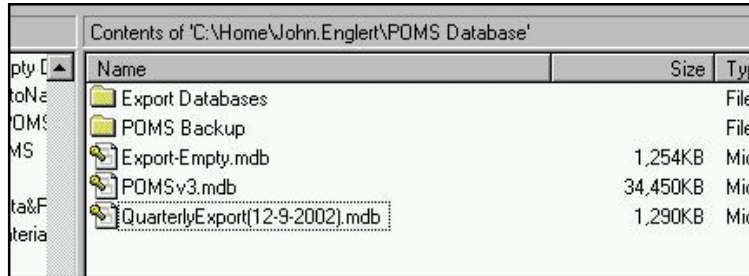
- There are two important things to keep in mind any time you perform an export or run an update on your POMS database:
  - You must have the “Export-Empty.mdb” or update database, e.g. “POMsv3Updates2.mdb”, in the same folder as your “POMsv3.mdb” database.

- You must open the POMS database or the updates database through MS Access, and not through Windows Explorer or through a shortcut, to successfully run the export or update. This is the only way Access knows where to find the files it needs to run the export or update.
2. The easiest way to start the export process or run the update is to first open your POMS database however you normally do. Then, go to File → Open Database.
  3. An “Open” window will appear and you can browse to find your POMS database folder.



4. If you are running an export, select your POMSV3.mdb file and double-click on it, or click “Open”. Your POMS database will re-open. You can then go to the Database Reports/Maintenance module and select the export you want to run. The exports are as follows:
  - Quarterly Accomplishments – run at the end of each fiscal year quarter
  - Annual ECS-008 – run in December as requested to export remaining ECS-008 data. Some of this data has already been exported each quarter with your quarterly accomplishments.
  - Total Data Export – run this when requested by the PM Information Coordinator or NPMC Manager.

5. After the export is done it a new export database will be created in your POMS folder. This database will have the current date in the filename, e.g. “QuarterlyExport(12-9-02.mdb”. Send this database as an attachment to the PM Information Coordinator or NPMC Manager as requested.



6. If you are performing an update, select the Updates Database which was sent to you or which you downloaded , e.g. “POMSv3Updates2.mdb”, and double-click on it, or click “Open”. Follow the instructions which appear when the database opens.