EcoAtlas Project Tracker Instructions for CDFW Restoration Grants / Watershed Restoration Grants

A. Introduction

Project Tracker tracks wetland and riparian restoration, mitigation, and habitat conservation projects throughout California, and is used by many government granting and regulatory agencies, Joint Ventures, non-profits and other project proponents. Once projects are approved for public display they can be viewed and downloaded along with other projects and data layers on EcoAtlas. Improved tracking and mapping of project activities will allow for more accurate analysis of changes in habitat extent, landscape-scale conservation planning, evaluation of progress towards meeting conservation objectives, and leveraging of restoration resources. New fields and reporting functionality are added regularly.

Project information must be entered in EcoAtlas Project Tracker for Implementation, Planning, and Acquisition projects; it is not required for Scientific studies. EcoAtlas is focused primarily on wetland and riparian habitat projects, and projects with linkages to these habitats; upland projects may also be entered. Large scale planning projects do not need to be entered until specific sites for further planning have been identified.

We recommend entering Project Tracker data early in the grant term if the timing is not otherwise specified in the Grant Agreement.

In addition to the fields required by EcoAtlas, CDFW requests that Grantees also complete the following:

- Project Description and/or Project Abstract.
- Project Information Source. Include the name and organization of the person filling out the form.
- Key Words.
- Alternative Project ID: Add CDFW grant agreement number; in the Permit or ID Type field: select “CDFW Prop 1 Grant ID” or, for non Prop 1 grants, “CDFW – Grant ID”.
- Groups: Add “CDFW Prop 1” or other relevant grant program.
- Project Sites:

- Projects must have at least one project site. See tab at the bottom of the Project Tracker data entry menu. Enter separate sites for non-contiguous areas; this is particularly important when portions of the project have different activities or are proceeding at different rates.
- Activities: Enter the activities associated with CDFW grant funding.
- Funding: Enter CDFW project funding. If there are multiple sites, enter total grant on one project site, or distribute among sites. Funding Secured-to-Date and Total Estimated Cost are calculated from the Funding information entered here.
- Map: Upload GIS shapefile (preferred) or create a hand-drawn project boundary.

After entering their project, Grantees must notify the CDFW Grant Manager, and CDFW Regional Administrator, Hildie Spautz (Hildegarde.Spautz@wildlife.ca.gov) to request to have the project approved and be made public.

The project will then be reviewed by Grant Manager for accuracy and completeness, in coordination with the Grantee. Project data will be visible to the public immediately on EcoAtlas.org; project boundaries will be visible after SFEI (the site Administrator) approves them, which typically takes several days.

Grantees should contact their CDFW Grant Manager with questions.

B. Important links and contact info

- EcoAtlas Project Tracker – to create an account; and enter/edit data, go to https://ptrack.ecoatlas.org This view of the database is password protected and is not accessible to the public.
- EcoAtlas Project Tracker Help Desk: ptrackadmin@sfei.org
- CDFW Project Tracker Administrative Regional Manager for assistance and project approval: Hildegarde.Spautz@wildlife.ca.gov
- Public viewer: https://ecoatlas.org/regions/ecoregion/statewide. To add Project Tracker layer, click on Layers > Project Information – Habitat Projects

C. Using Project Tracker

Use the Firefox or Chrome browser. Internet Explorer is not supported.

The **Project Tools** section (left side of the screen) contains the **Save** button which should be used to save any additions or updates to a project, and links to navigate to the various forms.

You must have a User login to enter data. Please request one using the "Create New Account" button under the sign-in fields at **ptrack.ecoatlas.org.**

Editing rights for project data in Project Tracker are limited to Users at the organization of the person who entered the project, the Administrative Region's designated administrators (i.e., CDFW), and SFEI.

Figure 1 below illustrates the levels of information and hierarchy for storing data associated with a habitat restoration project.

If you have questions or need assistance, please contact ptrackadmin@sfei.org.

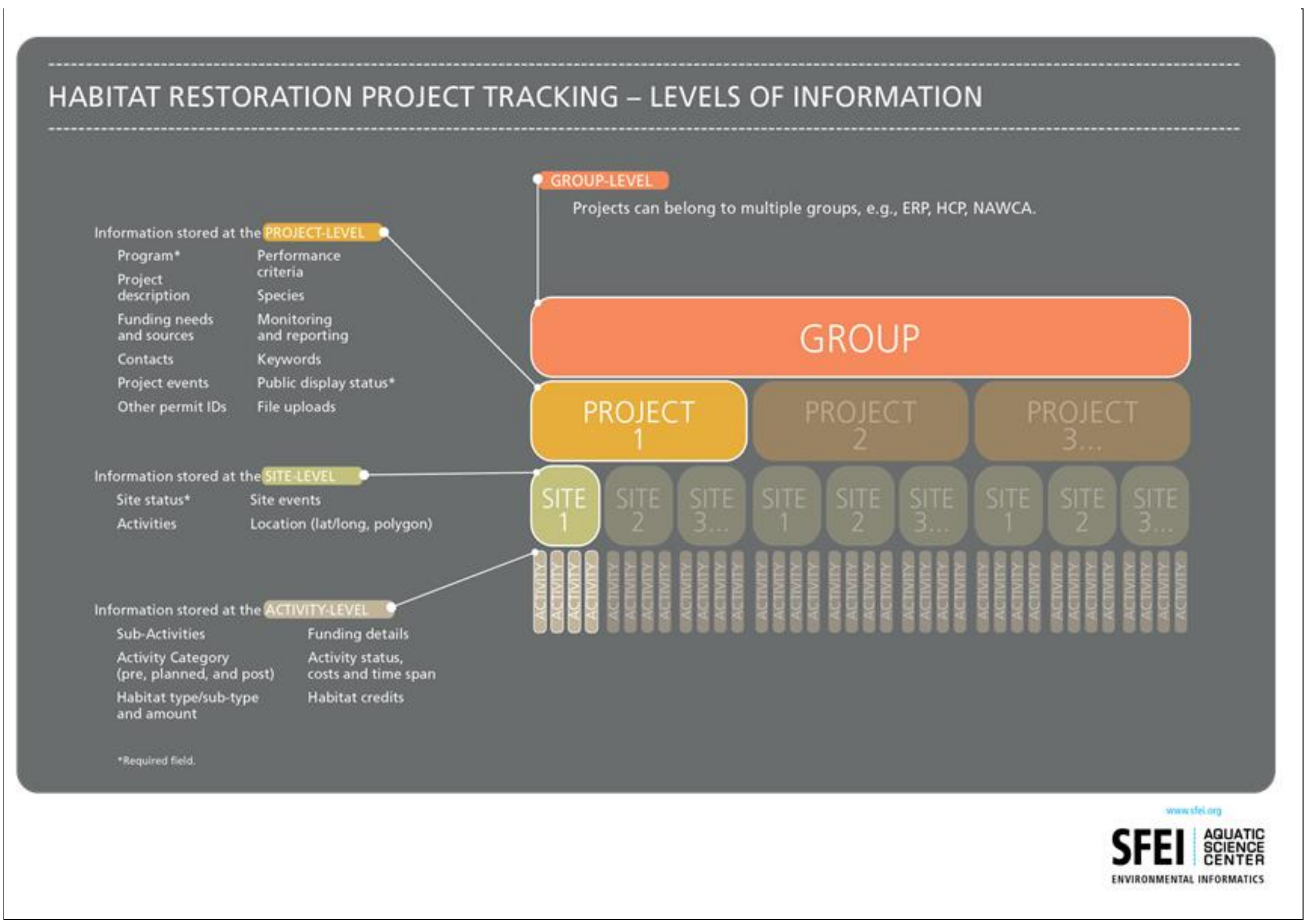

Figure 1. Levels of Information stored in EcoAtlas

D. Entering New Project Information

1. To get started:

   Note: To open and preview a form, save any changes you want to save first in your current form. Then select a form to preview. When you are done reviewing, or if you have not completed all required fields and need to exit, click on **Return to Project List** (upper left); and select **Abandon Changes** (upper right). You will not be able to save your data unless all required fields are completed.

- From the main Project Tracker window, click on **Create New Project** to view and edit data at the **Project Information** page. Information stored at the project-level includes sites*, events, contacts*, alternate project identifiers, performance criteria, species, and groups.
  - All required fields must be filled in before the Project Information page can be saved; this is the same for each new tab within the project.
  - Enter all project data required by EcoAtlas (indicated with an asterisk on the data entry form) following instructions provided there. Additional CDFW requirements are also asterisked in the detailed instructions below.
  - **Public Status*** should be "Public". Project will not be visible to the public until it is approved by CDFW or the alternate Administrative Region.
  - **Administrative Region***: Select "California Department of Fish and Wildlife" unless the Grantee is already working with one of the other agencies listed as Project Tracker Admin Regions. In the SF Bay area, select SF Bay Joint Venture. For Delta projects, select Sacramento San Joaquin Delta Conservancy. If an alternate Administrative Region is selected, please let the CDFW Grant Manager know as soon as possible, so that CDFW can coordinate with them.
  - **Project Type*** should be "Non-mitigation".
  - **EcoRegion*** and **Regional Board*.** Ecoregions and Water Board Regions are available as overlays on the EcoAtlas map to assist with identification.
  - Funding fields: **Funding Secured-to-Date** and **Total Estimated Cost** are calculated from Site-specific data; see **Add New Project Site**, below. **Funding Need** is not required.
  - Additional fields required by CDFW but not required by Project Tracker:

- **Project Description*.** This can be the long version of the project description. There is no character limit on this field.
- **Project Abstract*.** Limited to 350 characters. This can be the one used for the CDFW grant application.
- **Project Information Source*.** The name and organization of the person filling out the form.
- **Key Words*.** Add subject area key words.

2. To add or edit **Events** related to a project or site:
   - Events are any kind of noteworthy event or important date related to a project or site, e.g. grant start and end, project construction start and end, and project monitoring start and end dates.
   - To add new event information for a project, click on the **Events** form and then on the **Add Project Event** button. You may add multiple events for a project.
   - To add new event information for a site within a project, click on the **Site**, then the **Site Events** form and then on the **Add Site Event** button. You may add multiple events for a site.
   - For both Project and Site Events, the **Event Date** is required in the format "mm/dd/yyyy". If the exact month and day are unknown, use January 1st.
   - To edit event information, click on the **Edit** button next to the Event you want to update. If there is only one event for a project or site, it will already be in edit mode.
3. To add or edit **Contacts*** for a project:
   - Contacts have a relationship to the project. Each contact is assigned a role that defines this relationship.
   - Enter contact information for grantee's Project Manager or main contact person; add "Project Manager" to **Contact Comments.** Additional contacts may be entered if desired.
   - To add a new contact, click on the **Contacts** form and then (1) click on the **Add New Contact** button to enter a new contact into the database, or (2) use the **Search Contacts** feature to find an existing contact. Then click on the **Add** button next to the contact you want to add and select the appropriate Contact Role from the list provided. You may associate multiple contacts with a project.
   - To request a new Organization/Entity, please contact ptrackadmin@sfei.org.

- To edit contact information, click on the **Edit** button next to the Contact you want to update. If there is only one contact for a site, it will already be in edit mode.

4. To add or edit **Alternate Project IDs*** related to a project:
   - A project may be tracked by multiple governmental and non-governmental entities. Typically, each entity assigns its own internal identification number or code to the project.
   - **Alternative Project ID***: Add CDFW grant agreement number.
   - **Permit or ID Type***: select "CDFW Prop 1 Grant ID" or other relevant type.
   - To add a new alternate project identifier, click on the **Alternate Project IDs** form and then on the **Add Alternate Project Identifier** button. You may add multiple alternate project identifiers for a project.
   - To edit alternate project information, click on the **Edit** button next to the Alternate Project ID you want to update. If there is only one Alternate Project ID for a project, it will already be in edit mode.
   - The **Date Issued*** field requires the date format "mm/dd/yyyy". If the exact month and day are unknown, use January 1st. Add grant execution date to grant agreement number record.

7. To add or edit **Groups*** associated with a project:
   - Groups are a way to associate related projects, e.g., projects related to a program, conservation plan, or different phases of a project.
   - To add a new group, click on the **Groups** form and then click on a group listed under **Available Groups**. You may add multiple groups to a project. Add "CDFW Prop1" * if relevant. You may select multiple groups. Please see the list for other relevant groups e.g., Sierra Meadows Partnership and CDFW Priority Unscreened Diversion.
   - To request a new **Group**, please contact ptrackadmin@sfei.org.
   - To remove a **Group**, click on the group listed under **Selected Groups**.

8. Click on **Add New Project Site*** (at the bottom of the <u>Project Tools Box</u>) and populate **Site Details*** (fields: **Site Name*** and **Site Status***). Each project must have at least one site. Information stored at the site-level includes site status*, location*, activities*, habitat types*, funding*, site events, and site boundary map*. If the project has different phases in different areas, or non-contiguous project areas, sites should be identified separately in the submitted shapefiles and associated data entry. There can be more than one activity

and more than one dominant habitat at a site. CDFW may request that grantees submit additional, more detailed spatial information about project sites and activities to the Grant Manager.

9. Use **Activities** Tab to add or edit **Activities*** and **Habitat Types*** for a project site:

- The **Activities** form is flexible in its design to store both habitat type and amount details for an activity, as well as informational activities where such detailed information is not available or applicable.
- To add new activities, click on the **Activities** form and then on the **Add Activity** button. Generally, activities represent physical changes in habitat that the project's proponents intend to carry out.
- If monitoring is required for your project and you have selected "yes" for the **Monitoring required** field in the Project detail tab, you can include more details in the **Activities** form under the **Activity Type** of "Monitoring & Evaluation".
- Select the **Activity Type*** and **Habitat Type*** associated with the activity. You may select multiple **Subactivity Type** values, but it is not a required field. The **Subhabitat Type*** field is required, and you may only choose one value. Notes for CDFW Prop 1 project habitats: Delta wetlands are considered palustrine, not estuarine. Mountain meadow projects are also typically considered Palustrine and may also include Riverine. CDFW also requires **Water Regime*** data.
- Enter **Habitat or Activity Size***; this should correspond with the area of the grant funded project. If you would prefer to enter length and width values instead, and have the acres automatically calculated, selected "Yes" under **Calculate Habitat size**?
- A project site may consist of multiple activities and habitat types. The total project size should equal the sum of its activities as recorded in the **Habitat or Activity Size** field. Note: Only acres are displayed on EcoAtlas.
- If the site has more than one dominant habitat type, you must document these areas separately by adding additional **Activities**, then adding the associated habitat type. To add additional habitat types for an activity, click on **Add Activity**, select the same **Activity Type**, and select the additional **Habitat Type.** Enter the **Habitat Size*** in the dominant **Habitat Type.** The value in **Habitat Size** is used for Project Tracker reporting, not the spatial data uploaded on the map tab.
- Monitoring and Evaluation, Environmental Education/Outreach, and Demonstration are considered informational activities only and typically overlap in area with the on the

ground activities. To avoid double counting acreages, select the **Habitat Type** of "Unknown/Unspecified" and do not enter acreages.

- To edit activity information, click on the **Edit Activity** button next to the **Activity** you want to update. If there is only one activity for a site, it will already be in edit mode.

10. To add or edit **Funding*** information for an activity:

- To add new funding information, click on the **Activities** form and then on the **Add Funding*** button. Select the relevant grant program from the dropdown menu. You may add multiple funding entities/programs for a given site activity, each in a separate entry.
- Add **Funding Amount*, Grant Contract Number***, **Bond Proposition***, and **Award Date" *.**
- If you have listed additional funders as match in the CDFW application, they must be entered here. Otherwise, additional funding and funder data are optional.
- Keep in mind that **Funding Secured-To-Date** on the Project Information page is the total of the **Funding Amounts** entered for all of the sites. For projects with multiple sites, enter the total award as the **Funding Amount** for only one site (or if you prefer, you may divide the total among the sites). For the remaining sites make a note under **Funding Comments** indicating which site includes the **Funding Amount.**
- To request a new **Funding Entity/Program**, please contact ptrackadmin@sfei.org.
- To edit **Funding** information, click on the **Edit** button next to the **Funding Entity/Program** you want to update. If there is only one funding entry for a site, it will already be in edit mode.

11. To add or edit **Location** or **Map*** information for a project site:

- Project site boundaries are displayed as a data layer in EcoAtlas and can be viewed within the larger landscape context. If you do not submit a map, your project cannot be displayed on EcoAtlas (ecoatlas.org). CDFW requires projects to submit project site boundaries in the **Map** form.
- Click on the **Location** form to add or edit Latitude and Longitude values, in decimal degrees, for a project site.
  Note: User-supplied Latitude and Longitude values are not used in mapping functionality, so it is preferable to provide a map through the **Map*** form.

- From the **Map*** form, several different options are available to add or edit your site polygon or boundary.
- To add a site polygon, select (1) **Draw your site polygon** to draw a polygon or circle, or (2) **Upload Map File*** to upload a KML file or an ESRI Shapefile (option preferred for CDFW).
- To edit an existing site polygon, select (1) **Edit your site polygon** to drag the polygon edges to edit the shape, (2) **Redraw your site polygon** as a new polygon or circle, or (3) **Upload Map File** to upload a new KML file or an ESRI Shapefile. Note: If you have already uploaded a site polygon but when you open the Map form again you can't see the polygon, select **Edit your site polygon** to make the edges and vertices visible.
- To **delete a site polygon** and redraw it, select **Redraw your site polygon.** The original polygon or circle will also appear on the map while you are drawing a new one, but it will be deleted once you have saved your project.
- Note: Habitat size is summarized by the data entered in the **Activities** form and is not determined by the spatial data provided.

E. Request to have Project Approved and Made Public

Send an email to CDFW to let them know that the project is ready to be reviewed and made visible to the public: include CDFW Grant Manager and the Project Tracker Regional Administrator, Hildie Spautz (Hildegarde.spautz@wildlife.ca.gov)

F. Editing Existing Project Information

1. Select a project from your **Project List** on the main Project Tracker page. The list is ordered by the Last Updated record and includes information on the public status and create date.
2. Click on the appropriate form for updating the information. Click on the **Save** button when you have completed your updates.
3. To Enter new CDFW funding information for an existing project, see the directions for entering funding for a New Project, Question 9, above. Additional fields are required by CDFW that are not required by the Project Tracker system, so if you are updating an existing project to add CDFW-specific information, please see the list of additional fields on page 1.

G. Deleting Project Information

At this time, users cannot delete project information. If you need to have information deleted for your project, please contact ptrackadmin@sfei.org.

H. Viewing and Downloading Projects

All projects marked for public display can be viewed and downloaded from EcoAtlas (ecoatlas.org). This function is available to all users including the public.

1. Go to ecoatlas.org
2. To view projects on the map, click on **Map** and select **Habitat Projects** from the Layers list. Click on a project polygon for a link to the **Project Details**.
2. To filter the display of wetland projects on the map, select **Show Tools – Habitat Projects**. You can filter the display by Administrative Region, Group, Site Status, Project Type, or Organization.
3. To download project data, click on the **Download Habitat Projects Data** button. You may download data in multiple formats (Excel, CSV, KML, shapefile).
4. Alternatively, search for projects by name. Click on **Projects** from the home page. Click on an individual project link to view project details and map.