



Conservation Action Tracker

Measuring conservation progress on California's Central Coast

CCAT Manager Guide

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CCAT Manager Guide

Welcome to the Central Coast Action Tracker. You are almost ready to begin. Your organization should have been given a manager username and password. Only one manager's account is needed per organization, however you may elect to have more than one. If you have not received one, please first check with other staff to ensure that no one else has requested a username. If not, please email Sierra Ryan at sryan@mlml.calstate.edu to request one.


Organization Management

The account you were given is a manager level account. That means that you are able to manage a number of CCAT items within your organization. Once you are logged in, click your organization's name that appears in the upper right section of the navigation bar next to the Log Out button. This takes you to a page called Organization Management:: Organization Details. There are four sections on that page that this document will describe.



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1. Programs

The Action Tracker distinguishes three project levels: Programs, Projects and Project Actions. It is important before you begin entering projects that you think about how you want them organized. Programs are high level and often have multiple organizations and are supported by several projects. For example, IRWMP, Volunteer Programs and Livestock and Land are all considered Programs. There are several Projects that support these Programs. Similarly, a Project can support multiple Programs. For example the MBNMS First Flush Project supports both Water Quality and Volunteer Programs. As a manager, you can view the compiled Program, Projects and Project Actions related to your organization by clicking on **Programs**:

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Organization Management :: Program Involvement Overview

This is an overview of your organization's involvement in various programs, quantified by the number of projects and actions tagged within each program. *Note that a project can be tagged in multiple programs or in no programs, and the count here will not add up to the total number of your organization's projects.*

Program	# Projects (3 total)	% Projects (3 total)	# Actions (2 total)	% Actions (2 total)
Water Quality	2	67 %	2	100 %
Habitat Restoration	1	33 %	1	50 %
Agriculture	1	33 %	1	50 %
Volunteer Programs	1	33 %	1	50 %
Stewardship for Small Acreage	0	0 %	0	0 %
Watershed Coordination / Planning	0	0 %	0	0 %
Rural Roads	0	0 %	0	0 %
Stormwater	0	0 %	0	0 %
TMDL	0	0 %	0	0 %
Permit Coordination / Alternative Review	0	0 %	0	0 %
Water Supply	0	0 %	0	0 %
Water Conservation	0	0 %	0	0 %
Low Impact Development (LID)	0	0 %	0	0 %
Education and Outreach	0	0 %	0	0 %
Community Stewardship	0	0 %	0	0 %
Cleanups	0	0 %	0	0 %
Flood Control and Management	0	0 %	0	0 %
Groundwater Protection	0	0 %	0	0 %
Livestock and Lands	0	0 %	0	0 %
Irrigation Nutrient Management	0	0 %	0	0 %
IRWMP	0	0 %	0	0 %
Mobile Irrigation Lab	0	0 %	0	0 %

As a manager, you may want to identify the Projects your organization is involved with that support specific Programs listed and identify someone in your organization to enter each Project OR you may decide to just let people in your organization enter the Projects they are working on. In either case, when entering the Project into CCAT, the person will check a box indicating the Program(s) related to the Project. These will then appear in this consolidated spreadsheet. I apologize if this sounds confusing, however once you are working with the CCAT, it will become clear.



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A Project is a concerted effort to achieve specific goals, undertaken by an organization and sometimes partner organizations. A Project is supported by funding and staff, and one or more actions are required to accomplish project goals. For example, a Livestock and Lands Program could have a Project that focuses on outreach to landowners in a specific watershed. An IRWMP Program could have a Project that involves drilling test wells. The Project is the level that most of the data entry in the action tracker will focus on. At the Project level, CCAT allows places to enter a description, goals, timing, photos and several other categories of information. Sometimes it can be difficult to decide whether something is a Project in and of itself or a Project Action within a larger scope Project. As the manager for your organization, you may want to put some thought into this determination for your organization.

Additionally, a decision needs to be made when projects are completed as a partnership between several organizations. One organization may enter the entire Project by garnering input from partner organizations. On the other hand, since organizations cannot edit one another's projects, one organization may elect to enter all of the information related to their Project Actions as a separate Project. This decision should be made by all the partners to avoid confusion.

Example: The Santa Rita Creek Project fits under the IRWMP Program and the Water Quality Program. It involves a partnership of MBNMS, the Monterey RCD and the CCWG. Each partner organization has staff and funding related to the Project and is engaged in Project Actions. Each organization may decide to enter its part as a Santa Rita Creek project under their organization. Or the MBNMS may choose to enter the Project on behalf of everyone.

Within a Project, there are often many Project Actions. These can include one or more implementation sites, as well as activities like public events, organized cleanups, and monitoring for pollutants. Each of these Project Actions has a site associated with it. In CCAT during Project entry, the section for identifying Project Actions and locating them on the map is referenced as "Actions and Map Location." Sites can be entered on the map, either as the actual location or a representative location such as a watershed or even county to protect proprietary information. (See the Instructions for Project entry)

Example (cont'd) The Santa Rita Creek Project has several Project Actions: a public watershed day event, creek restoration, monitoring for pollutants, and outreach for conservation activities with growers.



2. Users

There are several access levels available in the action tracker. We recommend that each organization have one person who manages the Action Tracker using the managers account we sent you, and that they add other staff. The manager has the highest level of access, with the ability to view and edit all the projects entered by that organization. It is possible to assign more than one person to the manager level if you want individuals in your organization to be able to edit one another's projects. Below that is the Editor. They can enter and view projects but are only able to edit the projects that they entered. The viewer is able to see all the projects entered by the organization but cannot make changes or add new projects. The general public could also be considered a user, they are able to view projects that the person entering the project makes public. No data will be public unless the user who entered it makes it public. Other options are visible to all CCAT member and visible only to members of your organization.

To manage the users, select Users on the Organization Management page. That takes you to the User Accounts page. This page lists the current users for the organization. To edit an existing user, click on the pencil next to their username in the first column. Here you can edit the person's name, username, password, user level and projects they can access. To add a new user, click on the blue + in the upper right corner. Select a username, we recommend an email address. You can choose your own password or you can have the program generate one for you. Once you have filled in the form and selected the Access Level, click Create User.

3. Map Area

If your organization is mostly interested in projects within a smaller area than the Central Coast, you can set that in the Map Area section. You can still view projects on the map viewer, but the "projects in my area" section of the dashboard will be limited.

4. Report Banner

The last thing you want to be sure to prepare as a manager, is the banner that will go at the top of reports generated by your organization. If you do not select a banner, the CCAT banner is the default.

With your understanding of how to manage CCAT, you are now ready to help your organization start entering Projects.