



## Guide for Entering New Projects

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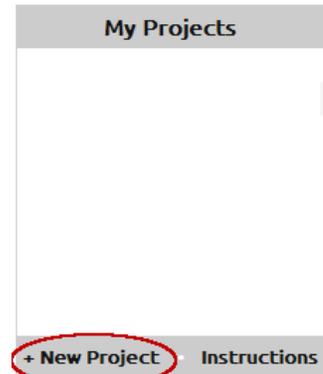


# Conservation Action Tracker

Measuring conservation progress on California's Central Coast

## Create the Project

1. Log in
2. Go to My Dashboard
3. Click on + New Project at the bottom of the My Projects section
4. Enter a name for the project and click continue.



## Project Information

Fill in all of the fields in the Project Information section and click the green “Save Project Information” button. Move your mouse over any field name to view help information/ field descriptions.

Privacy – After adding the project to CCAT, a project summary page including the project title, partners, description, goals, funders, documents, photos, contact information and map of project actions will be available for viewing. Set the Privacy option to specify who will have permission to view the project summary and see the project on the map. There are 3 options: members of your organization only, any logged in CCAT member, anyone.

### ▼ Project Information

<b>Privacy</b>	Project Summary is visible only to members of your organization		
Project Name *	<input type="text" value="Stormwater management"/>	Description *	<input type="text"/>
Status *	<input type="text" value="Planned"/>	Goals *	<input type="text"/>
URL	<input type="text"/>	Keywords *	<input type="text"/>
Project Programs	<input type="checkbox"/> Agriculture <input type="checkbox"/> Cleanups <input type="checkbox"/> Community Stewardship <input type="checkbox"/> Education and Outreach <input type="checkbox"/> Flood Control and Management <input type="checkbox"/> Groundwater Protection <input type="checkbox"/> Habitat Restoration <input type="checkbox"/> IRWMP <input type="checkbox"/> Irrigation Nutrient Management <input type="checkbox"/> Livestock and Lands <input type="checkbox"/> Low Impact Development (LID) <input type="checkbox"/> Mobile Irrigation Lab <input type="checkbox"/> Permit Coordination / Alternative Review <input type="checkbox"/> Rural Roads <input type="checkbox"/> Stewardship for Small Acreage <input checked="" type="checkbox"/> Stormwater <input type="checkbox"/> TMDL <input type="checkbox"/> Volunteer Programs <input type="checkbox"/> Water Conservation <input type="checkbox"/> Water Quality <input type="checkbox"/> Water Supply <input type="checkbox"/> Watershed Coordination / Planning <input type="checkbox"/> Other	Contact Person	Name: <input type="text"/> E-mail: <input type="text"/> Phone: <input type="text"/>
	Start & End Dates	<input type="text" value="01/02/2014"/> through <input type="text" value="01/02/2014"/>	<input type="text" value="ongoing"/>

**Save Project Information**



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## Climate & Emissions Reporting

If relevant for your project, use CalEEMod to generate an emissions report and fill in this section. When finished click “Save Emissions Information.”

### ▼ Climate & Emissions Reporting

Use [CalEEMod](#) to generate an emissions report, then enter some key values here. You may also attach the CalEEMod report for later reference. For more information, refer to the [Key Project Information Needed CalEEMod](#) guide, and to the [CalEEMod Guidance Document](#).

Reporting Timeframe

Land Use Size  acres

### Emissions

Construction:	Unmitigated Total CO2e <input type="text" value="0"/>	Mitigated Total CO2e <input type="text" value="0"/>
Operational:	Unmitigated Total CO2e <input type="text" value="0"/>	Mitigated Total CO2e <input type="text" value="0"/>

### Proposed Mitigation Strategies

- Energy efficiency
- Renewable energy
- Alternative energy
- Biodiesel use
- Water conservation
- Waste and Recycling
- Transportation reductions

### Upload the CalEEMod report

No report has been uploaded.  
You may upload the report using the upload box below.

No file selected.



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## Partner Organizations

View and edit the list of organizations related to the project. The display is separated into two tables, those who are members of the CCAT system and those who are not.

To add partners, click on the + icon. To edit a partner, click on the pencil. To delete a partner click X.

▼ Partner Organizations +

⌵ Partner Organization (CCAT)

✎ X Big Sur Land Trust (BSLT)

⌵ Partner Organization (Non-CCAT)

Click the checkboxes to select partner(s). Click Save.

If a partner is not in the list, click on the link at the bottom of the list to add.

**Partner Organizations** ✕

- Big Sur Land Trust
- Cachuma Resource Conservation District
- Castroville Community Services District
- Central Coast Agricultural Water Quality Coalition
- Central Coast Wetlands Group
- City of Salinas
- Coastal Watershed Council
- Coastlands Mutual Water Company
- Elkhorn Slough National Estuarine Research Reserve
- Environmental Justice Coalition for Water
- Garrapata Creek Watershed Council
- Loma Prieta Resource Conservation District
- Marina Coast Water District
- Monterey Bay National Marine Sanctuary Water Quality Protection Program

[Is a partner organization not listed? Click here](#)

Save Cancel

Add a partner name and website URL for each Non-CCAT Partner Organization.

Click Save.

partner name	partner website URL

Save



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## Staff Working On This Project

View and edit the list of staff users who have access to the project. Click on the + to add a new staff person, the pencil icon to edit a user, and the X to remove a user from the project.

▼ Staff Working On This Project <span style="float: right;">+</span>		
Username	First name	Last name
  greeninfomanager	Greg	Allensworth

Click the checkboxes to select user(s).

Click Save.

If a user is not in the list, click on the link at the bottom of the list to add.

### Staff Working on This Project ✕

greeninfomanager (Greg Allensworth)

[CREATE A NEW USER](#)

---

Create a new user:

Add user details and select an access level.

Viewers cannot edit the project. Editors have permission to edit the project. Managers have full access to the project and an option to delete the project.

Click Create.

### Create a New User ✕

**Username**

**Password**

**E-mail Address**

**First Name**

**Last Name**

**Phone**

**Access Level**  ▼

---



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## Links

View and edit the list of websites related to the project. Click on the + to add a new website, the pencil icon to edit website name or URL, and the X to remove a website..



Adding/Editing a website.

Choose a title for display on the Project Summary Page.

Enter the URL.

Click Add.

**Linked Document or Website** ✕

**Title**

**URL**

## Photos & Images

View and edit the list of photos and images related to the project. Click on the + to add a new image and the X to remove an image from the project.



To add an image, enter a caption and click Browse... to select a file from your computer.

Click Upload.

**Upload a New Photo** ✕

**Caption**

**File upload**  No file selected.



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## Funding

View and edit the list of project funding sources. Click on the + to add a new funding source, the pencil to edit a funding source and the X to remove a funding source from the project.

Funding							+
	Title	Type	Funder	Amount	Match Type	Match	
X	XYZ Title	Contract	XYZ Funder	10000	Cash Match, In-kind Match	10000	

TOTAL: \$ 20,000

Adding New Project Funding:

Fill in details.

Click Add.

**Project Funding** ✕

**Title**

**Funder**

**Contract Number**

**Funding Types & Amounts**

	Amount	Type	Source
\$	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
\$	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
\$	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
\$	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
\$	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>

**Match Types & Amounts**

	Amount	Type	Source
\$	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
\$	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
\$	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
\$	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
\$	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>



## Actions & Map Locations

From workshops and outreach to planning and implementation, a project may have a variety of actions and related locations. For a detailed view of what's happening and where, we're asking project managers to provide details regarding each project action and location. For each project action, you'll submit the following information:

1. Action details such as title, type of action, status, extents, outcomes, etc.
2. Action Location(s)
3. Action Assessment(s)

The project actions and locations will appear on the master map (visibility to other users depends on the project privacy settings that you specified earlier) and will also appear in the custom report creation tool.

In the table provided, view and edit the list of project actions and locations. Click on the + to add a new project action, the pencil to edit an action, and the X to remove an action from the project.

Actions & Map Locations <span style="float: right;">+</span>							
	Title	Type	Name	Date	Locs	Assms	
 	Invasive species management workshop	Education/Outreach	Workshop/class	07/31/2013	1	1	
 	Planting native species	Implementation	Critical Area Planting	06/30/2013	1	0	
 	Buckthorn removal	Other	Other	05/20/2013	7	1	



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## 1. Adding Project Action Details

Fill in Project Action details. Hold mouse over the fields for more information.

To add action extents, click on the +.

Fill in the quantity and unit (eg. 30 participants) and click Save.

The screenshot shows the 'Project Action' form with the following details:

- Title \***: New Project Action
- Action \***: Access Road Improvement
- Status \***: Planned
- Activity Date Completed**: ongoing
- Extents**: A dropdown menu is open, showing a '+' icon circled in red. Below it, an 'Extent' entry is visible with a quantity of '30' and a unit of 'participants'. The 'Save' button for this entry is circled in red.
- Objectives**: Click to expand
- Habitats**: Click to expand
- Species**: Click to expand
- Audiences**: Click to expand
- Outcomes**: Empty field
- Treated or represented acres**: Empty field, GIS estimate: NaN
- Map**: Shows the Central Coast region with labels for Santa Rosa, Napa, Stockton, Gilroy, Salinas, Soledad, and Goalinga. A legend on the right includes Marine Sanctuaries, MBNMS Watershed, Watersheds, Sub-Watersheds, NHD Hydro Units, Counties, and Parcels.

Add Cancel



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## 2. Adding Location(s) to the action

**Project Action**

Species > Click to expand

Audiences > Click to expand

Outcomes

Treated or represented acres  acres GIS estimate: 0

Is this the first time this acreage is being entered into this system?

No

Yes

NRCS Compliant?

Non-English Available? > Click to expand

**Locations** +

Name	Type
------	------

**Assessments** +

Title	Date
-------	------

City, landmark, or address Search

Scroll down to the Locations table

Click the + button

Save Cancel



## Setting the Location Type

Select “**Physical**” if you have detailed location information for the actual area where an action took place. If the project area is large in scope (eg. 80 water quality monitoring sites throughout the county) or you wish to preserve privacy and just show a generalized location on the map, select “**Representative**.” Add a location name and click “Save.”

**Action Location** ✕

**Location type**  ▼

- N/A
- Representative
- Physical**

map indicating the actual area where an action took place.  
Use representative locations to preserve privacy or to indicate a large scope.

**Location name**

**Save**

To use existing boundaries such as a parcel or sub-watershed to define a project location, choose one of these options. You'll next have an option to click on the map to select a shape to use for the project boundary. See example below.

**Define a Location** ✕

- Add the MBNMS Watershed Boundary
- Add a county
- Add a watershed
- Add a sub-watershed
- Add a NHD hydro unit
- Add a parcel
- Enter a point by address
- Draw a point
- Draw an area
- Enter coordinates for a point

To manually draw the project location, choose one of these options.



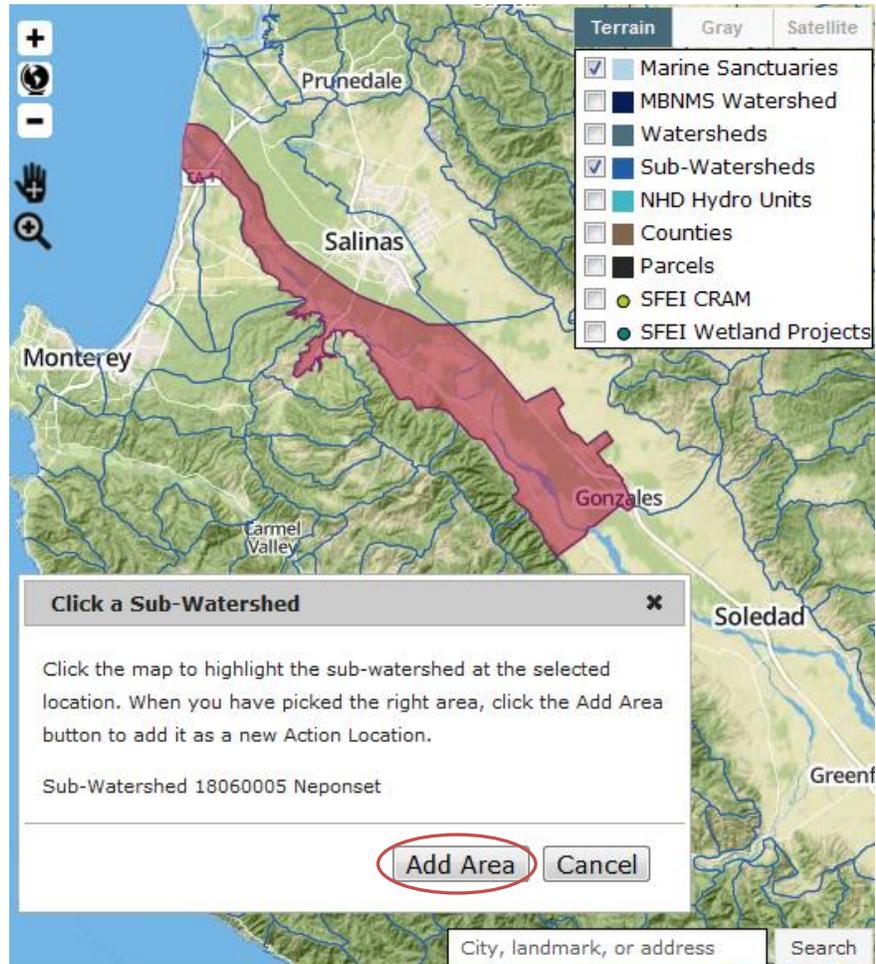
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## Using existing boundaries (parcels, watersheds) to define a project location

Click on the map to highlight and select a boundary to use for the action location. When finished, click the “Add Area” button.

**Tip:** Drag the “Click a Sub-Watershed” dialog down a bit to see map options for turning on reference layers to help guide your location selection.





# Conservation Action Tracker

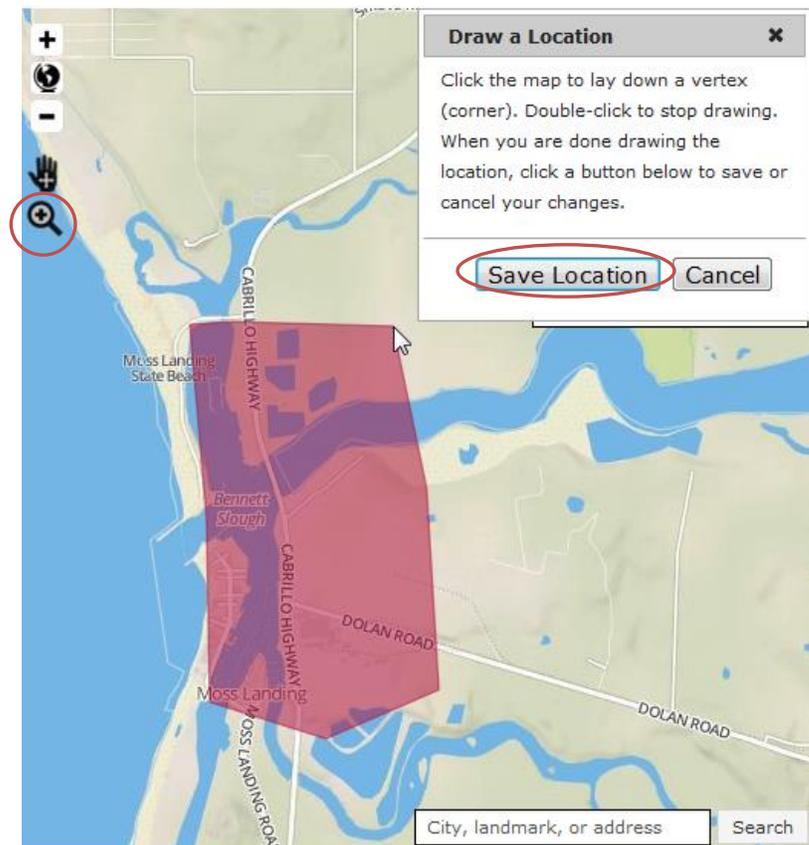
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## Manually drawing project locations

Click on the map to start drawing. Double click to stop drawing.

When finished, click the “Save Location” button.

**Tip:** Use the magnifying glass to quickly zoom to the general project area before beginning the drawing.





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## Editing Action Locations

After adding locations, they will appear on the map, outlined in red and also in the Locations table.

### Locations

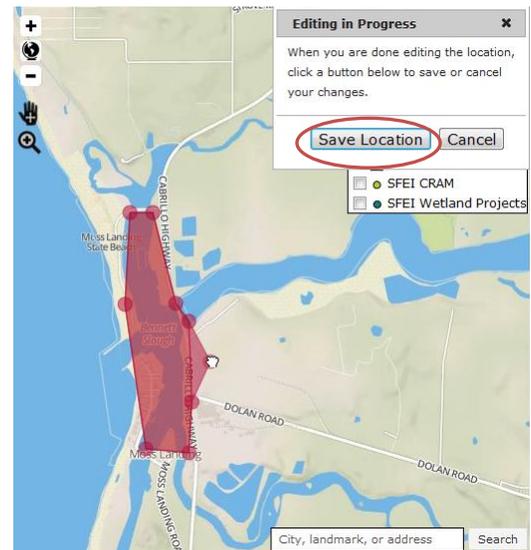
	Name	Type
   	Bennett Slough	Physical

Click  to delete a location

Click  to edit the location name or type.

Click  to edit the location shape. After activating the shape edit tool, all of the vertices will appear and dragging them will change the shape. When finished click "Save Location." See example to the right:

Click  to zoom to the action location.





### 3. Adding Assessments to the Action

Scroll down to the Assessments table and click the +.

**Assessments**



Title	Date
-------	------

Next, fill in the Action Assessment table and click “Save” when finished

**Action Assessment** [Close]

**Title**

**Date**

**Method**  [Dropdown]

**Model**  [Dropdown]

**Results**



## Save the Project Action

Finally, when finished adding the action details, location(s) and assessment(s), click “Save” at the bottom of the window.

Project Action
✕

Treated or represented acres:  acres GIS estimate: 0 acres

Is this the first time this acreage is being entered into this system?

NRCS Compliant?

Non-English Available? [Click to expand](#)

**Locations**

Name	Type
Bennett Slough	Physical

**Assessments**

Title	Date
Project Assessment	2013-12-31

Terrain Gray Satellite

- Marine Sanctuaries
- MBNMS Watershed
- Watersheds
- Sub-Watersheds
- NHD Hydro Units
- Counties
- Parcels
- SFEI CRAM
- SFEI Wetland Projects

City, landmark, or address

## Comments

To encourage coordination among organizations working in similar regions, we’ve set up a project comments feature. If your project privacy settings allow other users to view your project, users may view and add comments via the Project Summary Page.

**2 Comment threads** +

---

**Greg Allensworth (GIN) @ 2013-07-22 10:56** ↻

Great Project!

---

**Greg Allensworth (GIN) @ 2014-01-03 11:01** ↻

I agree! We'd love to volunteer!



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## Project Summary Page

When finished adding data for the project, click the “Save Project Information” button at the bottom of the page. Next, you can click on the “View Project Summary” link to view a formatted project information page as well as download a PDF version of the Project Summary.



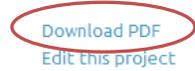
[Instructions](#) • [View Project Summary](#)



# Conservation Action Tracker

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[Home](#) [My Dashboard](#) [Map](#) [Reports](#) [GIN](#) [Log Out](#)



## Buckthorn removal

**GreenInfo Network (GIN)** in partnership with Amigos de los Rios, Big Sur Land Trust, Calflora, California Invasive Plant Council (Cal-IPC), Coastal Watershed Council, Dune Conservation League, Green Voters For A Better Tomorrow

Status: Active  
Dates: 05/20/2013 - 05/26/2013

Volunteers removing buckthorn from Crosby Lake

### Goals

Remove invasive buckthorn from 5 acres of habitat near Crosby Lake.

### Programs

- Habitat Restoration

### Funders

- Greg A
- Sales tax
- Thomas Smith Foundation
- Weedkillaz Inc

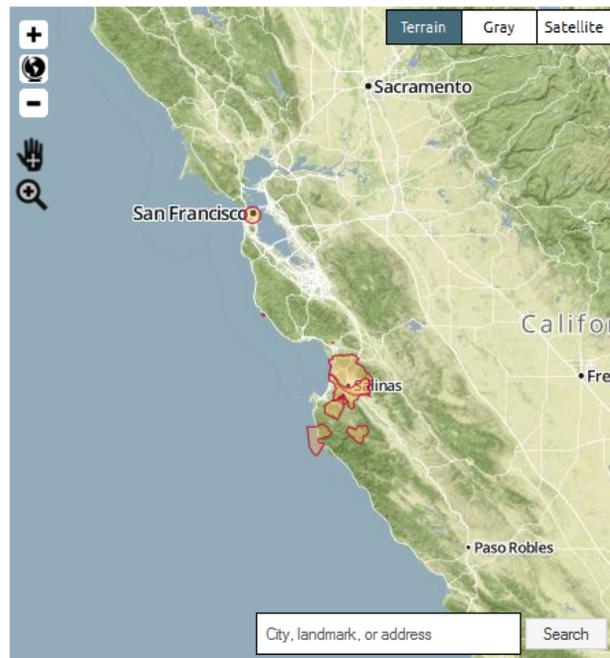
### Contact

Jennifer Strahan  
651-917-0191  
jennifer@greeninfo.org  
[Project website](#)

### Websites & Documents

- [Bing](#)
- [Google](#)
- [more](#)
- [Untitled Link](#)

### Photos & Images



	Title	Status
🔍	Invasive species management workshop Education/Outreach :: Workshop/class	Planned
🔍	Planting native species Implementation :: Critical Area Planting	Active
🔍	Project Action Education/Outreach :: Community event	Planned
🔍	New Project Action Education/Outreach :: Community event	Completed
🔍	New Project Action Planning/Design :: Conservation Plan	Planned