



Guide for Creating and Sharing Reports

Create a custom Report.....	2
Getting Started.....	2
Select Projects Using Filters.....	3
Area Filter.....	3
Organization Filter.....	3
Action Type Filter.....	4
Program Filter.....	4
Objective Filter.....	4
Date Filter.....	4
Status Filter.....	5
Keyword Filter.....	5
Remove Filters.....	5
Add Content To Your Report.....	6
Add a Map.....	6
Add a Table.....	7
Add a Graph.....	8
Add Some Text.....	9
Finalize Your Report.....	10
Add titles and captions.....	10
Sort Report Items.....	11
Create a PDF Report.....	12
Save Report Settings.....	13
Open a Saved Report.....	13
Sharing Reports – Public Reports Archive.....	15



Conservation Action Tracker

Measuring conservation progress on California's Central Coast

Create a custom Report

Getting Started

Log in and select “Generate a Custom Report” from the Reports menu

Conservation Action Tracker
Measuring conservation progress on California's Central Coast

Home My Dashboard Map Reports Tour GIN Log Out

My Projects

- Buckthorn removal
- Community Outreach
- Erosion Control
- Pervious Alley Project
- Pervious Driveways
- Rain Gardens
- Site assessment trials
- Stormwater Management

Projects In My Area

- Lower Salinas Valley treatm
- Santa Rita Creek Ferrasci P
- Sea Mist restoration ponds
- Snapshot Day
- Wetland

Public Reports Archive

Report Name	Date
Generate a Custom Report	11-15 12:51
Nov 15 test 3	2013-11-15 12:55
Nov 15 test 4	2013-11-15 12:58
Nov 15 test 4	2013-11-15 13:00
Nov 15 test 4	2013-11-15 13:09
Nov 15 test 6	2013-11-15 13:09
Nov 15 test 6	2013-11-15 13:19
Nov 15 test 8	2013-11-15 13:22

Activity Stream

- Greg edited an action in project Buckthorn removal
- Greg edited a assessment in project Buckthorn removal
- Greg edited a location in project Buckthorn removal
- Greg edited a location in project Buckthorn removal
- Greg added a location to project Buckthorn removal
- Greg added an action to project Buckthorn removal
- Greg edited a location in project Buckthorn removal
- Greg added a location to project Buckthorn removal
- Greg added a location to project Buckthorn removal

+ New Project - Instructions

© Conservation Action Tracker

Interactive mapping by GreenInfo Network



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Select Projects Using Filters

Use the filters to specify which projects you would like to include on the map and in the summary tables and graphs.

1. Select Projects Using Filters

Area

Organization

Action type

Program

Objective

Date

Status

Keyword

Area Filter

Set the Area Filter if you only want to include projects within a specific region such as county or watershed.

Filter By Area

Quick area search:

Need more detail?
[Click here to search by clicking the map.](#)

Organization Filter

Set the Organization Filter if you only want to include projects related to particular organizations. By default, reporting includes all projects that you have permission to view.

If you only want to report on your organization's projects, set the Organization filter accordingly.

Filter By Organization

all none

- 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
- GreenInfo Network
- Loma Prieta Resource Conservation District
- Marina Coast Water District
- Monterey Bay National Marine Sanctuary Water Quality Protection Program
- Monterey County Water Resources Agency
- Monterey Peninsula Water Management District



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Action Type Filter

Set the Action Type filter if you only want to include projects related to particular action types.

Filter By Action Type ✕

- all none
- Implementation
- Education/Outreach
- Planning/Design
- Permitting
- Other
- Cash Assistance

Apply

Program Filter

Set the Program filter if you only want to include projects related to particular programs.

Filter By Program ✕

- all none
- Agriculture
- Cleanups
- Community Stewardship
- Education and Outreach
- Flood Control and Management
- Groundwater Protection
- Habitat Restoration
- IRWMP
- Irrigation Nutrient Management
- Livestock and Lands

Objective Filter

Set the Objective filter if you only want to include projects related to particular objectives.

Filter By Objective ✕

- all none
- Defensible space
- Ecosystem function
- Endangered species
- Flooding
- Food safety
- Habitat
- Nutrients
- Pathogens
- Pest management

Date Filter

Use the project date slider to include projects within a specific time range.

Filter By Project Date ✕

01/01/2010 02/01/2014

Apply



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Status Filter

Use the status filter to select projects by current status.

Filter By Project Stat... ✕

- all none
- Active
- Completed
- Aborted
- On hiatus
- Planned

Apply

Keyword Filter

Use the keyword filter to include projects matching a keyword.

Keywords will match those specified in the Project Information “Keywords” section when the project manager added the project.

Filter By Keyword ✕

keyword filter

Apply

Remove Filters

Active project filters display under the filter options. To remove a filter, click on the **X** next to the filter name.

1. Select Projects Using Filters

Area Organization Action type Program Objective Date Status Keyword

Active filters: Active & Completed ✕ Keyword: pesticides ✕



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Add Content To Your Report

Use this section to add desired items to your report. After adding, you will have a chance to change the order of appearance and add titles and captions to each of the items.

Add a Map

With this feature, create a custom map of project action locations to include within the report.

1. Navigate to the “Add A Map” tab.
2. Zoom to the area you would like to include in the map.
3. Use the Map Legend and Layers section to add other layers to your map if desired.
4. Choose your base map: Terrain, Gray Satellite.
5. Click “+ Add To Report” button.

2. Add Content To Your Report

Add A Map Add A Table Add A Graph Add Some Text

+ Add To Report

2. Zoom Options

4. Base Maps

3. Layer Options



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Add a Table

A variety of tables are available for adding to your report. Navigate to the “Add a Table” tab to view options. Click the “+ Add to Report” button for each table you would like to include.

Data Download Tip: If you would like to download the tables as an Excel spreadsheet, click the Download XLS link.

2. Add Content To Your Report

Add A Map **Add A Table** Add A Graph Add Some Text

In addition to adding these tables to your report, you may download them as an Excel spreadsheet.

Download XLS

6 locations fit your filter criteria.

+ Add To Report

Org	Project	Action	Location	Location Type	Date Completed	Project Status
GIN	Buckthorn removal	Planting native species	Area for planting	Representative	2013-06-30	Active
CCWG	Santa Rita Creek Ferrasci Park restoration	Ferrasci Park restoration	Santa Rita Creek Restorations	Physical	2015-06-01	Active
CCWG	Santa Rita Creek Ferrasci Park restoration	Ferrasci Park restoration	Santa Rita Creek Outreach	Physical	2015-06-01	Active
CCWG	Sea Mist restoration ponds	Sea Mist Ponds Restoration	Sea Mist ponds	Physical	2009-01-01	Completed
GIN	Site assessment trials	Earth Day 2012 Working Picnic	Westside Road	N/A	null	Active
GIN	Site assessment trials	Earth Day 2012 Working Picnic	Goose Island	Representative	null	Active

Programs Summary

+ Add To Report

Program	Funding	Projects	Status	Earliest	Latest
Agriculture	\$ 80000	3	Active	2006-01-01	2015-12-01
Community Stewardship	\$ 594262	2	Planned	2010-01-01	2015-12-01
Education and Outreach	\$ 2194262	3	Active	2010-01-01	2015-12-01
Habitat Restoration	\$ 2927803	5	Active	2006-01-01	2015-06-01
IRWMP	\$ 2194262	3	Active	2010-01-01	2015-12-01
Permit Coordination / Alternative Review	\$ 1600000	1	On hiatus	2012-05-04	2014-11-01
Rural Roads	\$ 1620000	2	Planned	2012-05-04	2014-11-01
Stewardship for Small Acreage	\$ 1600000	1	Aborted	2012-05-04	2014-11-01
Volunteer Programs	\$ 0	1	Planned	2000-05-05	9999-05-01
Water Quality	\$ 120000	6	Completed	2000-05-05	9999-05-01
Watershed Coordination / Planning	\$ 594262	3	Planned	2010-01-01	2015-12-01

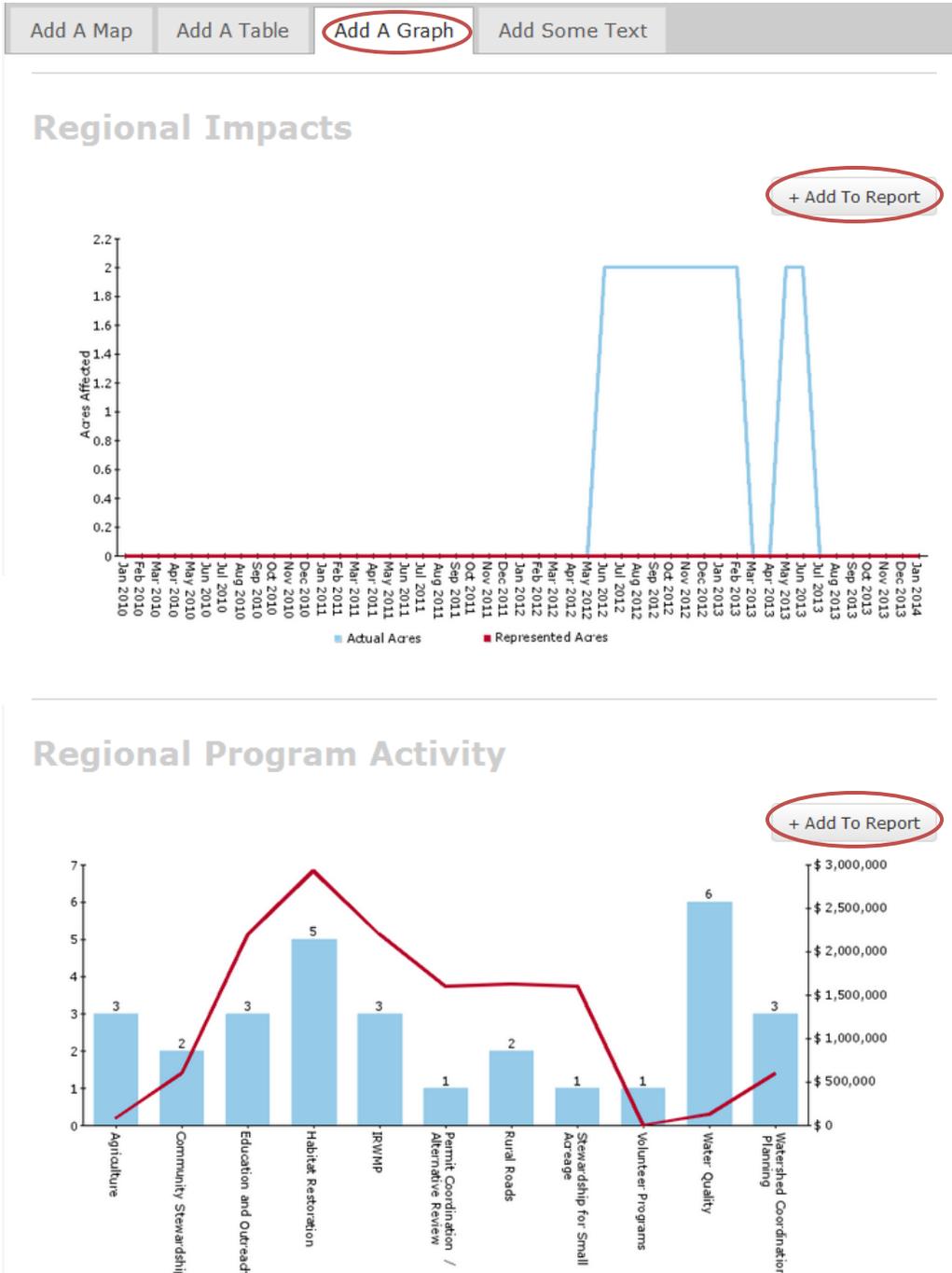


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Add a Graph

Navigate to the Add a Graph tab and click the “+ Add To Report” buttons to add a graph to your report.





Add Some Text

To add text to the report, click on the “Add Some Text” tab. Add a Page Title, and then use the editor below to add text for the report. When finished, click “+ Add To Report.”

2. Add Content To Your Report

Add A Map Add A Table Add A Graph **Add Some Text**

Add a page of text to the report.

Page Title: Clear + Add To Report

B I U x² x₂ H1 H2 H3  

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean molestie, ipsum et varius laoreet, nisl neque sollicitudin nulla, non interdum ante nisi vitae nunc. Suspendisse id nisi lobortis, ornare dolor quis, pretium erat. Nam vitae auctor odio, suscipit adipiscing leo. Proin lobortis facilisis mi nec gravida. Vestibulum sed dignissim metus. Phasellus consectetur massa tortor, vel ultrices velit convallis in. In hac habitasse platea dictumst. Fusce adipiscing velit at sapien lacinia porttitor. Donec fermentum dapibus cursus. Donec ac luctus est. Nunc sit amet scelerisque ligula.

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Finalize Your Report

After adding items to the report, click on View Report button in the upper right. This will open up a window with options for finalizing your report, saving report settings and generating a PDF version of your report.



Add titles and captions

The Finalize Your Report page represents each map, table, graph and text page with an icon and a title. There is also a text area for adding a caption to any of the items. Edit the titles and captions as desired.

Print This Report ✕ [Help](#)

Finalize Your Report

- Drag items up and down to set their order in the report.
- Click a red X to remove an item from the report.
- Edit the title and caption for each report item.

Title:

Subtitle:

Author / Attribution:

 **Title** ✕

Caption ⋮

 ✕

⋮

 ✕

⋮

Print Report

Save Settings As New Report

Close



Sort Report Items

If you would like to change the order in which report items appear, click on the item's icon and drag up or down.

Print This Report x

Finalize Your Report Help

- Drag items up and down to set their order in the report.
- Click a red X to remove an item from the report.
- Edit the title and caption for each report item.

Title:

Subtitle:

Author / Attribution:

 x

This is a list of volunteer work locations.

 x

Drag the report items up and down to set their order in the final report. x

 x

This graph shows all regional program activity for 2013.

Print Report

Save Settings As New Report

Close



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Measuring conservation progress on California's Central Coast

Create a PDF Report

From within the “Finalize Your Report” window, click on the “Print Report” button at the bottom.

Print This Report ✕

[Help](#)

Finalize Your Report

- Drag items up and down to set their order in the report.
- Click a red X to remove an item from the report.
- Edit the title and caption for each report item.

Title:

Subtitle:

Author / Attribution:

 ✕

This map shows locations where volunteers have helped to clear invasive Buckthorn. This area will be replanted with native species.

 ✕

This is a list of volunteer work locations.

 ✕

This graph shows all regional program activity for 2013.

Print Report

Save Settings As New Report

[Close](#)

When the report is ready, click on the link to download the PDF file.

Generating Report ✕

Your report is being generated.
This can take several minutes, depending on the number and type of sub-reports involved.



Report Ready ✕

Your report is ready.
[Click here to download](#)

[Close](#)



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Save Report Settings

If you anticipate re-running a report periodically, you can save the settings. When running the report again in the future, any new project that meets the filter criteria will be included.

Click the “Save Settings As New Report” to save the report. The report will be saved with the same name as Title you specified.

The screenshot shows the 'Finalize Your Report' window. It includes a 'Print This Report' button in the top left and a 'Help' link in the top right. The main heading is 'Finalize Your Report'. Below it are instructions: 'Drag items up and down to set their order in the report.', 'Click a red X to remove an item from the report.', and 'Edit the title and caption for each report item.' There are input fields for 'Title' (Sample Report), 'Subtitle' (XYZ Subtitle), and 'Author / Attribution' (Greg Allensworth). A 'Project Locations' section is partially visible. A white dialog box is overlaid in the center with the text: 'Your report settings have been saved, and can be recalled later via "Load a Report".' and an 'OK' button.

Open a Saved Report

There are two places from which you can open a saved report.

1. My Dashboard – Click on a Report Name to open the custom report tool with the saved settings loaded.

The screenshot shows the main dashboard of the Conservation Action Tracker. It features a navigation bar with 'Home', 'My Dashboard', 'Map', 'Reports', 'Tour', 'GIN', and 'Log Out'. The dashboard is divided into four main sections:

- My Projects:** A list of project categories including Buckthorn removal, Community Outreach, Erosion Control, Pervious Alley Project, Pervious Driveways, Rain Gardens, Site assessment trials, and Stormwater Management.
- Projects In My Area:** A list of specific projects such as Lower Salinas Valley treatm, Santa Rita Creek Ferrasci P, Sea Mist restoration ponds, Snapshot Day, and Wetland.
- My Reports:** A table of saved reports with columns for report name and date.

Report Name	Date
Nov 15 test 3	2013-11-15 12:51
Nov 15 test 3	2013-11-15 12:55
Nov 15 test 4	2013-11-15 12:58
Nov 15 test 4	2013-11-15 13:00
Nov 15 test 4	2013-11-15 13:09
Nov 15 test 6	2013-11-15 13:09
Nov 15 test 6	2013-11-15 13:19
Nov 15 test 8	2013-11-15 13:22
Sample Report	2014-01-05 10:12
- Activity Stream:** A vertical log of user actions, such as 'Greg edited an action in project Site assessment trials' and 'Greg deleted an action in project Site assessment trials'.



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Measuring conservation progress on California's Central Coast

2. Go to Reports -> Generate a Custom Report and click the “Load A Report” button.



Select the report you would like to load from the list.

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Measuring conservation progress on California's Central Coast

Home My Dashboard Map Reports Tour GIN Log Out

Start Over Load A Report View Report

1. Select Projects Using Filters

Area Organization Action type Program Objective Date Status Keyword

2. Add Content To Your Report

Add A Map Add A Table

Load A Report

Title	Subtitle	Author	Saved
Nov 15 test 3		Greg Allensworth, GIN	2013-11-15 12:51
Nov 15 test 3		Greg Allensworth, GIN	2013-11-15 12:55
Nov 15 test 4	everything except a location filter	Greg Allensworth, GIN	2013-11-15 12:58
Nov 15 test 4	everything except a location filter	Greg Allensworth, GIN	2013-11-15 13:00
Nov 15 test 4	everything except a location filter	Greg Allensworth, GIN	2013-11-15 13:09
Nov 15 test 6	everything!	Greg Allensworth, GIN	2013-11-15 13:09
Nov 15 test 6	everything!	Greg Allensworth, GIN	2013-11-15 13:19
Nov 15 test 6	everything!	Greg Allensworth, GIN	2013-11-15 13:22
Sample Report	XYZ Subtitle	Greg Allensworth, GIN	2014-01-05 10:12

Close

Map Legend & Layers

- ✓ Action Locations
 - Implementation
 - Education/Outreach
 - Planning/Design
 - Permitting
 - Other
 - Cash Assistance
- Marine Sanctuaries
- MBNMS Watershed
- Watersheds



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Sharing Reports – Public Reports Archive

If you would like to make PDF reports available to the general public, you can upload them to the Public Reports Archive.

1. Log in.
2. From the menu bar, go to Reports -> Public Reports Archive.



3. Click on “+ Add a report to the public archive” to add a new report. Click on X to delete a report from the archive and the pencil icon to edit the name, description or file of a previously uploaded report.



Reports Archive

Download reports about projects that affect **you**.

[+ Add a report to the public archive](#)

First Flush
Citizen Monitoring



Add a Title and Description for display in the Reports Archive.

Next, browse for the PDF file on your computer and click Save.

Upload a report to the archive ✕

Title:

Description:

The downloadable document. PDF files only.
 No file selected.