



Project Tracker

Project Tracker (ptrack.ecoatlas.org) consists of separate forms that group similar fields of information together for ease of data entry and review. Forms only need to be populated if information is available. All required fields are marked with an asterisk (*).

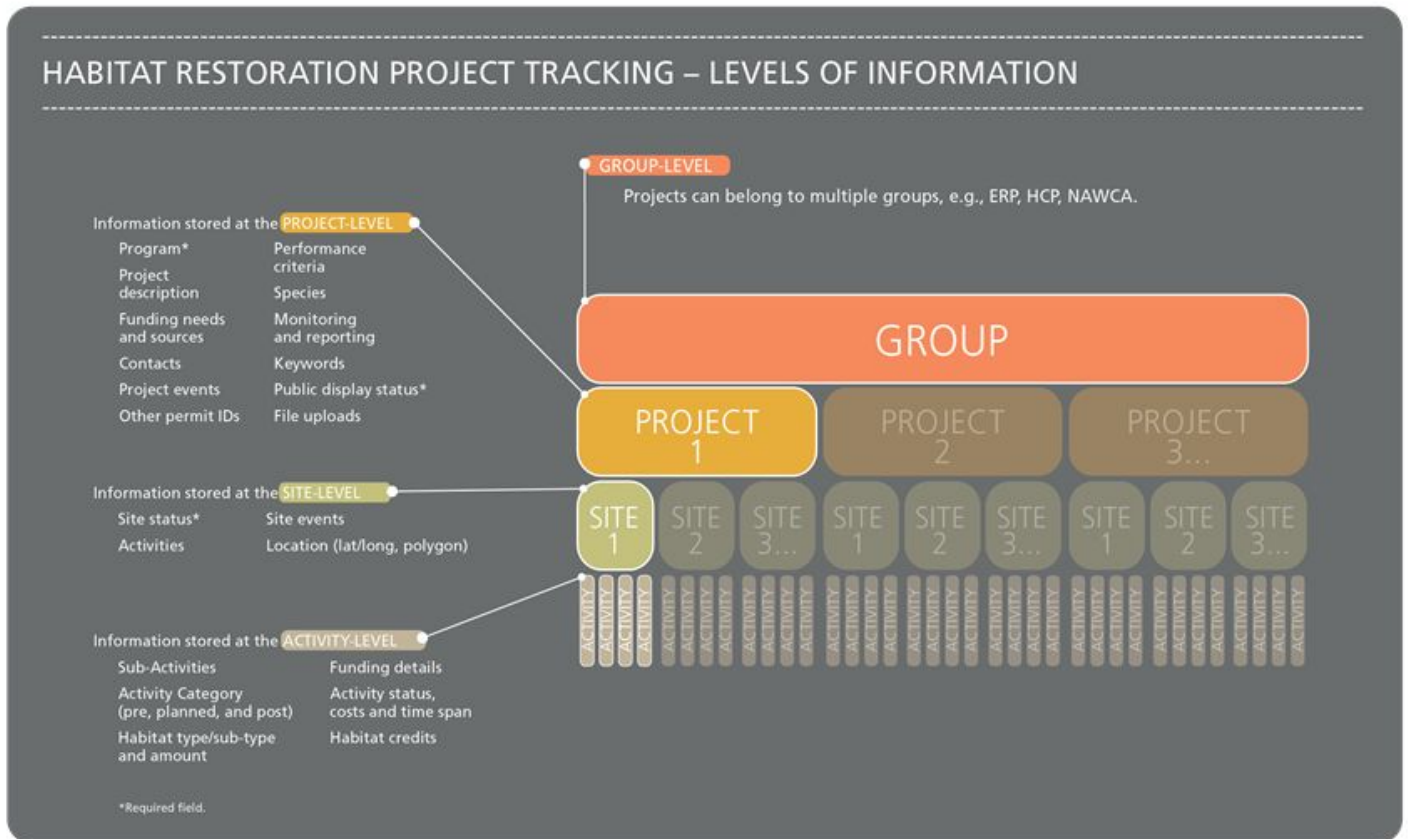
The **Project Tools** section contains the **Save** button which should be used to save any additions or updates to a project, and links to navigate to the various forms.

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

Entering New Project Information

1. To get started:
 - Note: To **open and preview a form**, save any changes you want to save first. Then select a form, review the required fields marked with an asterisk (*), select **Save and Abandon Changes**.
 - Click on **Create New Project**. Information stored at the project-level includes: sites, events, contacts, alternate project identifiers, performance criteria, and species.
 - Click on **Add New Project Site** and populate **Site Details**. 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.
 - **Figure 1** below illustrates the levels of information and hierarchy for storing data associated with a habitat restoration project.

Figure 1. Levels of Information



- If monitoring is required for your project and you have selected “yes” for the **Monitoring required** field, you can include more details in the **Activities** form under the Activity Type of “Monitoring & Evaluation”.

2. 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.

- 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.
- If the **Habitat or Activity Size** is known, enter this value. 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.*
- 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.
- Other activities are informational, such as Monitoring and Evaluation, Environmental Education/Outreach, and Demonstration. In these cases, select the Habitat Type of “Unknown/Unspecified”.
- 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.

3. 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. You may add multiple funding entities/programs for a given site activity.
- 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.

4. 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).

- 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 optimal 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. Note: Currently, the mapper functionality is only available using the Chrome browser.
- 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.

- 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.
- 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.

5. 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.

- 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 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.

6. 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.

- 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.

7. To add or edit [Alternate Projects](#) related to a project:

A project may be tracked by a number of governmental and non-governmental entities. Typically, each entity assigns its own internal identification number or code to the project.

- 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.

8. To add or edit [Performance Criteria](#) related to a project:

Performance criteria typically describe the required environmental goals of the project, how to measure them, and what to do if they are not met. Original criteria are defined at the beginning of a project, and progress towards achieving those criteria are tracked.

- To add new performance criteria, click on the [Performance Criteria](#) form and then on the [Add Performance Criteria](#) button. You may add multiple performance criteria for a project.
- To edit performance criteria, click on the [Edit](#) button next to the Performance Criteria Description you want to update. If there is only one Performance Criteria for a project, it will already be in edit mode.
- The [Evaluation Date](#) is required in the format “mm/dd/yyyy”. If the exact month and day are unknown, use January 1st.

9. To add or edit [Species](#) for a project:

Species are either the main focus or tangentially affected, depending on the project's objective to benefit or eradicate the species.

- To add new species information, click on the [Species](#) form and then on the [Add Species](#) button. You may add multiple species to a project.
- To edit species information, click on the [Edit](#) button next to the Species Name you want to update. If there is only one Species for a project, it will already be in edit mode.

10. 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.
- To request a new Group, please contact ptrackadmin@sfei.org.
- To remove a Group, click on the group listed under [Selected Groups](#).

Editing Existing Project Information

1. Select a project from your [Project List](#). The list is ordered by the Last Updated field, and also 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.

Deleting Project Information

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

Viewing and Downloading Projects

All projects marked for public display can be viewed and downloaded from EcoAtlas (ecoatlas.org).

1. To view projects on the map, 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 habitat projects on the map, select [Tools - Habitat Projects](#). You can filter the display by Region, Site Status, Organization, or Project Type.
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. To view a list of all projects, click on [Projects](#) from the home page. Click on an individual project link to view the project's information page and access [Files & Links](#) uploaded to the project's file repository.