SAN FRANCISCO BAY
RESTORATION AUTHORITY

Project Tracker Instructions for Authority Grantees

All Authority grantees are required to use the Project Tracker tool to create and maintain an EcoAtlas entry as a condition of the grant agreement.

You can find a recorded training on using Project Tracker at this link.

Quick-Start Checklist:

- **Step 1:** Create an account and wait for approval.
- **Step 2:** Log in and click "Create New Project."
- **Step 3:** Complete required fields (Project Name, Region, Description, Contacts) as described in this document.
- **Step 4:** Add sites and activities with the required information.
- **Step 5:** Notify your project manager that you have completed the entry.

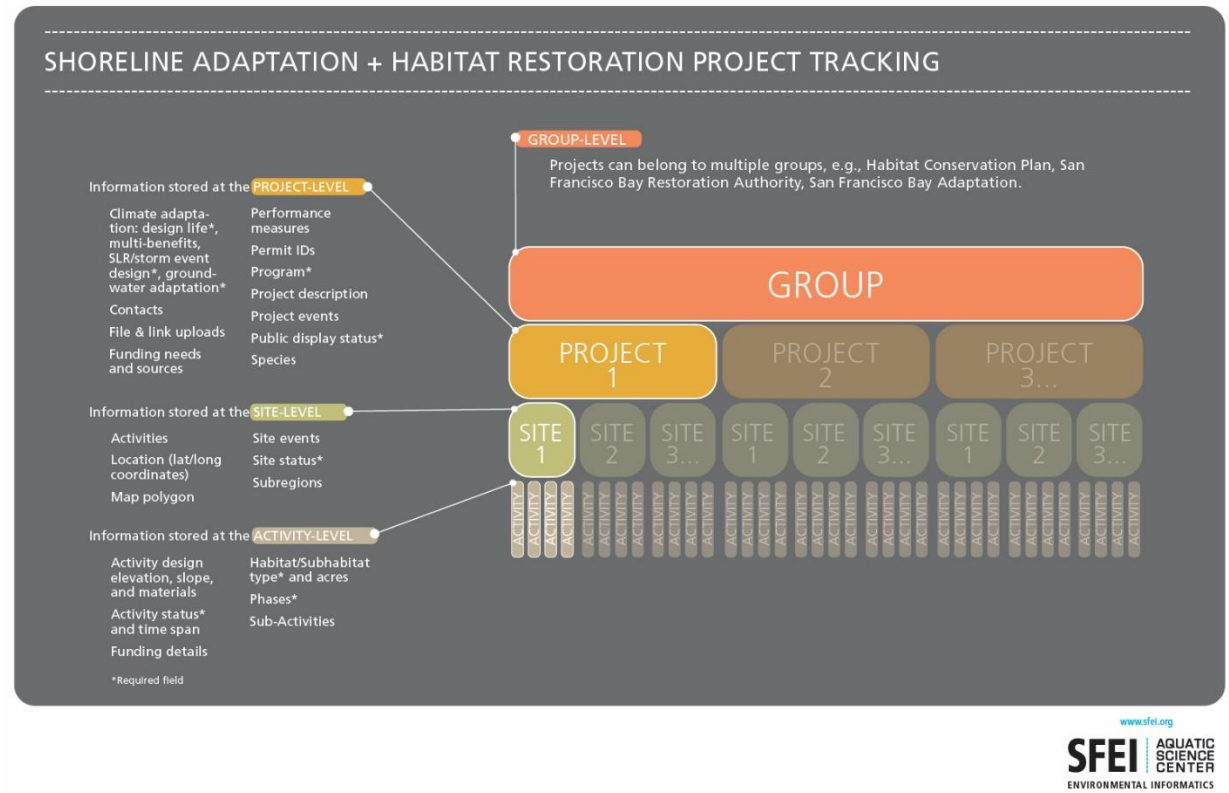
Avoid Common Pitfalls:

- Make sure you select "San Francisco Bay Joint Venture" for the Admin Region and "Non-mitigation" as the project type. If you select other options, SFBRA staff cannot access your draft entry for approval.
- Always click the blue save button after adding new data.
- Create at least one **Site** and **Activity** for your project. This is where you will add habitat acres, funding, a project area shapefile/polygon, and phasing information for this part of your project. Without these, your project will not show up on maps or dashboards.

Overview of Project Tracker Data Structure:

Project Tracker uses a hierarchical structure to organize project data.

- **Groups** are the highest level. Within a group, there can be several projects. Conversely, projects can also belong to multiple groups.
- The **Project** level contains the main project information, such as the project description and total project cost.
- Within a project, there can be several **sites** that each represent a geographically distinct area. The site level contains information relevant to a specific site, such as the location or site-specific events.
- Within a site, there can be several **activities** representing different project phases or project components. The activity level contains information on the associated habitats and secured funding.



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Getting Started:

Please add or update your project in Project Tracker. You can create a new account here. Accounts require approval from a Project Tracker administrator. Approval may take a few days.

There are general Project Tracker instructions on the site in addition to the below guidance.

Note: If when attempting to create an account, your organization is not available from the drop-down menu, you can email the Project Tracker administrator to add your organization at ptrackadmin@sfei.org.

1) Login to your Project Tracker Account (solve the math captcha problem at the bottom of the page)
2) Click "Add or Edit Projects"
3) Click "Create New Project" or use the search function to find and edit an existing project

Tip: Save your work frequently! There are many steps and it is important to save after each step.

Navigation buttons:

- The blue "**Save**" button is located in the upper left corner. After saving, a tan box will appear in the upper right corner notifying you that your work has been saved successfully.
    - Note: **Do Not click** the green "Add ….." buttons (e.g., "Add Project Event") to save your information when entering Project Events, Contacts, Species, etc. Only use the "Add..." buttons to create additional entries. Once a second entry is added, you must fill out the required information in order to save your project and proceed.
- To delete an entry, you must contact the Project Tracker admin ptrackadmin@sfei.org
- The gray "Return to Project List" button will bring you back to the list of projects that you have access to edit
- The green "Add a New Site" button will create a new site within your project
- The gray "Return to Project Information button" will bring you back to the main project information page that contains the Project Name, Administrative Region, Project Description etc. This button only displays after you have created at least one site.
- The navigation pane on the left side contains links to enter various project information (Project Events, Contacts, Groups, etc.)
- The "i" icon next to the Project Tracker fields will display a table of definitions that help define the drop-down menu options.

Create Project Tracker Project Entry:

Highlighted fields below indicate information that should be gathered prior to completing your Project Tracker entry.

**indicates fields required by Project Tracker

*indicates fields that are required by Project Tracker ONLY after clicking the "Add..." button (e.g. Project Events are not required, but if you click "Add Project Event", then the associated Event Date and Event Type fields are required and you will not be able to proceed without filing out this fields)

Make sure to include the following, at a minimum:

Main Entry Page

Project Name:** Enter the project name

Public Status:** Public

Administrative Region:** Choose the San Francisco Bay Joint Venture unless you have already been told the project is not eligible for the JV list or is outside of their jurisdiction. Most projects will fall under the SFBJV admin region. If the project is not SFBJV eligible, select the Unspecified Baywide projects Administrative Region. Selecting one of these two administrative regions is important for allowing SFBRA Staff access to edit the project entries.

Project Type:** Non-mitigation

Project Short Name (Limit to 15 characters):** Enter an abbreviated project name.

Project Description: Enter the project description. There is no character limit.

Project Abstract (Limit to 350 characters): Enter the project abstract in approximately 1-3 sentences. This will display on EcoAtlas, but the project description will not.

EcoRegion:** Bay/Delta

Regional Board:** San Francisco Bay

County: Select the appropriate county or counties.

Funding Need: Enter the funding amount needed in dollars. For SFBRA/SFBJV projects, enter funding need for the next 3-5 years.

Funding Secured To-Date: This amount is automatically entered as a sum of all the different funding sources entered under the Activities Section (described on the next page in the Funding section under Activities). Confirm that this auto-calculated value matches your total funding secured to date.

Total Estimated Cost: This amount is automatically entered as a sum of the Funding Need and Funding Secured To-Date. Confirm that this auto-calculated value matches your total estimated project cost.

Is monitoring required?: (yes/no/unknown)** Includes scientific monitoring or permit-related monitoring

Contacts Tab

Contacts: Enter contact information for the project lead. If your organization is not available from the drop-down menu, email the Project Tracker administrator to add your organization. ptrackadmin@sfei.org

First Name*, Last Name*, Organization*, Contact Role*, Department*

Project Events

Enter the dates for notable project events (i.e. project start date, start of construction, project end date, levee breach, etc.) Include project start date, at a minimum. Keep updated as major milestones, such as start of construction, are achieved.

Note: Events relevant to only a specific project site (i.e., levee breach, phase start/end date, start of construction only at one site), can be entered under the **Site Events** tab within each site (see below).

Event Date*: Enter the date of the event

Event Type*: Select the appropriate choice from the drop-down menu (i.e. project start date)

Group Tab

Groups: Please tag it with the Group name "San Francisco Bay Restoration Authority (Eligible)" and "San Francisco Bay Restoration Authority (Funded)", as appropriate. Selected groups will appear in the right pane "Selected Groups". To remove a group, click on the group in the "Selected Groups" pane and it will be moved back to the "Available Groups" pane.

If your BCDC permit requires your project to be listed in the Regional Project Database, please also tag it with San Francisco Bay Adaptation in addition the other tags listed above.

Climate Adaptation Tab

The Climate Adaptation tab is optional for SFBRA grantees; however, we encourage grantees at the planning or implementation stage to describe how the project is designed to adapt to sea level rise and other flood hazards, as well as the additional shoreline resilience benefits the project provides. This information helps the SF Bay region track progress and communicate needs for shoreline resilience through the Shoreline Adaptation Project Map (SAPMAP). BCDC has developed data entry guidance for this section that you can access here. BCDC Data Entry Guidance For Permittees available on their project website.

Project Benefits Tab

The information on this tab supports regional tracking efforts. SFBRA grantees should enter which SFBRA program areas their project falls under as follows:

- *Vital Fish, Bird and Wildlife Habitat Program* = Habitat restoration or protection
- *Safe, Clean Water and Pollution Prevention Program* = Water quality/flow improvement
- *Shoreline Public Access Program* = Access and recreation enhancement
- *Integrated Flood Protection Program* = Flood risk and erosion reduction

Enter the groups that will receive the benefit, which might only be General Public depending on your project location. For How will the benefit be tracked, select Qualitative Assessment, since all SFBRA grantees fill out a Lessons Learned Report as a final deliverable. If you are also doing Quantitative Assessment, select that as well. Under Benefit Comments, enter "SFBRA Program Area"

Alternate project IDs Tab

Alternate Project ID*: Enter SFBRA Project ID if already assigned. This is the project number shown on the staff recommendation and has the format RA-XXX.

Permit or ID Type*: SFBRA- Project ID

Date Issued: Enter date that the project was authorized by the board (also found on Staff Recommendation)

Species Tab

If applicable, include species that the project targets to benefit or eradicate.

Species Name*: (species are listed alphabetically by scientific name)

Species Focus*: (species main focus or tangentially affected)

Species Objective*: (benefit or eradicate species)

Files & Links Tab

Click green "**Add a File or Link**" button

Title*: Staff Recommendation **Type***: Other

Save, then upload **PDF of the Staff Recommendation**. If you make a mistake, you may change the display status to not approved and ask the EcoAtlas administrator to delete the entry for you.

Ecoatlas Display Status*: Approved

Performance Measures Tab

Skip this tab. SFBRA staff will fill it out once notified that you have created the entry.

Program Priorities Tab

Selected Priorities: Include all relevant Measure AA Program Areas. These are identified in the Staff Recommendation.

Measure AA Program Area – Integrated Flood Protection Program
Measure AA Program Area – Safe Clean Water and Pollution Prevention Program
Measure AA Program Area – Shoreline Public Access Program
Measure AA Program Area – Vital Fish, Bird, and Wildlife Habitat Program

Selected Program Priorities will appear in the right pane "Selected Priorities". To remove a Program Priority, click on the priority in the "Selected Priorities" pane and it will be moved back to the "Available Priorities" pane.

Add New Site to Project Button

Click the Green **"Add New Site to Project"** button on the left pane

Site Details

Site Name*: The Site Name should represent the geographic area of the project (i.e., American Canyon Wetlands). If project has more than one site, name the site appropriately by specifying the geographic region (i.e., Pond A22 and Pond B33).

Site Status*: The site status should generally correspond with the activity status (see below). If the site has multiple activities, the site status should match the activity with the least progress.

Least Progress ⟶ Most progress

Planning/Scoping | In-progress/Implementation | Completed

Although there nine options for Site Status, please select one of the following three:

- **Planning/Scoping**: if at least one activity status is "Proposed", "Planning in-progress", or "Permitting"
- **In-progress/Implementation**: if none of the activity statuses are "Proposed", "Planning in-progress", or "Permitting" and at least one activity status is "Implementation in-progress" or "Construction in-progress"
- **Completed**: if all activity statuses are "Completed" (i.e., wait to mark a site as complete until all activities are complete)

Location

Latitude: Enter latitude for the project site in decimal degrees

Longitude: Enter longitude for the project site in decimal degrees

Location Comments: Include a note specifying where this lat/long represents (e.g., entrance to site)

Activities

Phase*: Choose the appropriate option from the drop-down menu that best describes the phase/stage of this project activity. See table of definitions for phases. If your project does not fit one of the available phase types, you may select "none".

Note: If your project includes final design and permitting, you can select the final design phase. You do not need to add a separate activity for permitting.

Activity Type*: Choose the appropriate option from the drop-down menu. Common Activity Types are Acquisition/Preservation/Protection, Restoration (unspecified), and Environmental Education/Outreach/Stewardship/Access. A table of definitions can be viewed by clicking the (i) icon.

Note: If your project includes community engagement as a part of the restoration planning process, you can select the Restoration (unspecified) Activity. You do not need to add a separate activity for Environmental Education/Outreach/Stewardship/Access.

If the project is a construction level project, the Activity Type must be selected from the following categories. This allows projects to be pulled into the SFBRA Project Dashboards correctly.

Habitat Types	Activity
Tidal Marsh Complex	Restoration
Managed Ponds	Enhancement
Seasonal Wetlands	Restoration or Enhancement
Beach Habitat	Restoration or Enhancement
Other Bay Habitats	Restoration or Enhancement
Shellfish Beds	Restoration or Enhancement
Submerged Aquatic Vegetation	Restoration or Enhancement
Other Subtidal Habitat	Restoration or Enhancement
Upland Habitat	Restoration or Enhancement
Transition Habitat	Restoration or Enhancement

Activity Status*: Although there are ten options, please choose from the following five:

Proposed
Planning in-progress
Planning completed
Implementation in-progress
Implementation completed

Note: Acquisition activities should be marked as “Planning in-progress" until the land is acquired. Once the acquisition is complete, mark as “Completed”.

Easement/Agreement Time Span*: (if applicable)

Habitat Type/Subhabitat Type*: In Project Tracker, you must first select a Habitat Type and then the appropriate Sub-habitat Type. To maintain consistency between the habitat types you entered on the SFBRA Grant Application with the habitat types entered in Project Tracker, follow the below habitat examples when entering your project information.

Note: If your project area has multiple habitat types with defined acreage for each, record the primary habitat type within the activity and list all habitat types and associated acres in the Project Description.

Habitat Type Entered on SFBRA Application & Displayed on Dashboard	**Habitat Type**	**Subhabitat**
Beach Habitat	Subtidal Habitat	Beach
Managed Ponds	Seasonal Wetland	Diked wetland
Tidal Marsh Complex (Includes Tidal Marsh, associated tidal mudflat, and shallow bay habitat)	Estuarine Wetland	Marsh or Mudflat
Other Bay Habitats	Unknown/unspecified habitat	None
Seasonal Wetlands	Seasonal Wetland	Unknown/Unspecified or Grassland and associated wetland
Other Subtidal Habitat	Subtidal Habitat	Artificial structures, Rock, or Soft substrate
Shellfish Beds	Subtidal Habitat	Shellfish beds (includes oyster habitat)
Submerged Aquatic Vegetation	Subtidal Habitat or Estuarine Wetland	Submerged aquatic vegetation
Transition Habitat	Estuarine-Upland Transition Zone	None or Ecotone Levee

Upland Habitat	Upland	Grassland, Scrub-shrub, or Unknown/Unspecified

Calculate Habitat Size?*: No (Enter Habitat or Activity Size)

Habitat or Activity Size: Enter size of habitat in acres.

Note: Include the acres here even if you do not want these acres to be added to the total project area.

Units*: Acres

Include these acres in reported project area?: Check the box to include the Habitat or Activity size (acres) in the total reported Project Area. This field is used to prevent double-counting of acres for activities occurring in the same geographic area. Uncheck the box to exclude the Habitat or Activity size (acres) from the total reported Project Area.

For example, if you have an activity for the final design phase with the "Include these acres in reported Project Area" box checked. You should then uncheck the box for the implementation phase activity in order to avoid double counting of acres and misrepresenting the project size. For activities occurring in the same geographic area, only one of the activities should have this box checked.

Note: You can double check the total reported Project Acres and which activities are included in the project area by hovering over the Project Acres value in the upper ribbon. This value is in white text surrounding by a gray bubble. It will say, "The project has a total of # activities. # of these activities are contributing to the reported acres for the project".

Habitat Source Type*: For a recently initiated project, you may select "Not Recorded"

Funding

Enter all funding sources & amounts to date. Funding is entered at the activity level. If a single grant is funding multiple activities (habitat types/phases/project components) listed in Project Tracker, associate the funding with the main activity.

Funding Entity/Program*: Select "SFBRA San Francisco Bay Restoration Authority – Measure AA" if already granted funding. Other funding sources can be added separately by clicking the green "Add Funding button"

Funding Amount: Enter the funding amount.

Grant Contract Number: Enter the SFBRA grant agreement number if already executed. Note that this is different from the project number and has the format SFBXXXX-RAXXX. This can be found on the grant agreement.

Bond Proposition: Select Measure AA if already granted funding.

Award Date: Record the date of the board meeting when the project was authorized SFBRA funding. This can be found on the Staff Recommendation.

Site Events

Event Date/Type*: Include the event date and event type for site-specific events (i.e Phase start/end date, construction or other events specific to a site). Events that apply to the entire project, can be entered under the **Project Events** tab.

Events Comments: Include any relevant details (i.e. Preliminary design phase). Comments are displayed on EcoAtlas.

Map

Map: Please draw a map (project site polygon) or upload a map file. Selecting the World Imagery basemap can be helpful for drawing site polygons. See Instructions for details.

Acceptable upload file formats:

- File can be a *.kml or *.kmz with one or more polygons only.
- Shapefiles must be in a .zip file and include a .prj file.
- Import up to 20 polygons or select 1 for your area of interest.
- Attributes associated with the polygon will be ignored.

Congratulations on completing your Project Tracker entry! **Please notify your Project Manager or Sara Haugen, sara.haugen@scc.ca.gov, that the display status needs to be made public**. Your project will display on EcoAtlas after it is approved by an administrator.