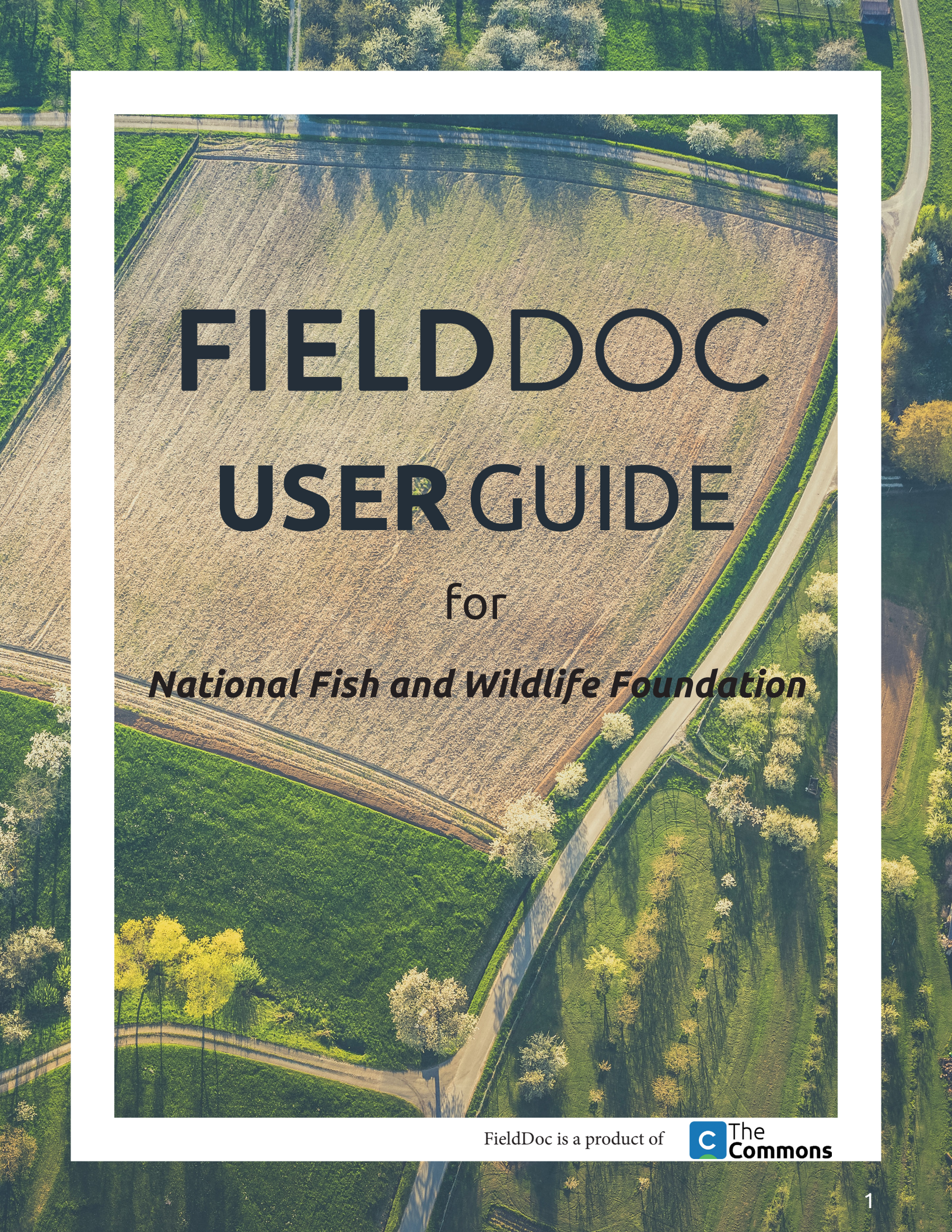


FIELDDOC USER GUIDE

for

National Fish and Wildlife Foundation

FieldDoc is a product of The Commons

Welcome to FieldDoc

Project implementation tracking is a critical and careful component of restoration work. Funding opportunity applicants and award recipients can streamline their project management and estimated pollution reduction calculations with the FieldDoc platform.

FieldDoc.org is a project management tool developed for the restoration community. The platform is set up so that the applicants, award recipients, and program administrators can track not only the location of restoration investments but also the impacts of those investments of reducing sediment and nutrients. Use FieldDoc to ensure the quality and consistency of data and information shared by award recipients.

How to Use this Guide

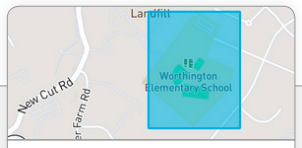
This guide provides complete but simple instructions for applicants and award recipients on use of the FieldDoc platform. Use this guide to create an account and fill out your project award details, calculate estimated reduction metrics and then track progress towards implementation. Additional online help documentation and videos are available at help.fielddoc.org.

While FieldDoc has been built with simplicity in mind, we highly recommend familiarizing yourself with the system and data entry process using this guide before embarking on your data entry process.

Let's get started!

FieldDoc System Structure

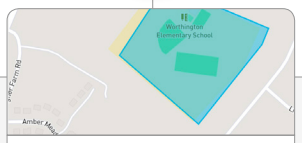
Use this refernce to understand how the different components of FieldDoc fit together to build out your entire project and track your progress via metric targets.



Project Name

PROJECT LEVEL

Each grant award needs a separate project tile. Make sure to add the **Funding Opportunity** and project-wide **Metrics**.

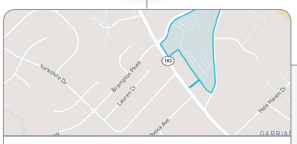


Site 1

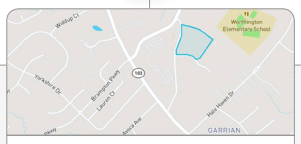
Site 2

SITE LEVEL

Add all of your sites, an organizing unit for your practices. Add the site boundaries via **Location**. No metrics are needed at this location.



Practice 1



Practice 2

PRACTICE LEVEL

The **Practice Type**, **Location** and polygon acreage are inputs to calculate the estimated N, P, and TSS reductions. Add more practice-level **metrics** too.

Installation Report

Installation Report

INSTALLATION REPORT

Track progress on your practice installations via installation reports. Installation reports can only be added from within each practice's dashboard.

Icon library

Each project consists of **project**, **site**, and **practice** dashboards. The following list of icons and their brief description provides an overview of all icons you might encounter throughout FieldDoc. Familiarize yourself with them here so you can move around and build your project faster.

Summary Dashboard
Return to your summary dashboard from a feature input page.
available for project, site, practice

Edit
Change the details to the name, description, or practice type.
available for project, site, practice

Funding Opportunity
If you edit or remove your grant program, the lists of options and models may be impacted.
available for project

Project Collaborators
Everyone that you add can access and edit all components of your project.
available for project, site

Partnerships
Associate outside organizations providing match with your project.
available for project, site

Metric Targets
NFWF has a curated metrics list. Add metrics the project level. They appear in your practices.
available for project, practice

Save
Save your work using the check mark. FieldDoc does not save work automatically.
available for project, site, practice

Location
Mapping tool to upload or draw polygon of site or practice area.
available for site, practice

Tags
Check for any tags for users to choose.
available for project, site

Geography
Non-editable shapefiles of general delineations based on site location.
available for site

Photos
Mapping tool to upload or draw polygon of site or practice area.
available for practice

Print
Choose “save to pdf” in your print settings.
available for project, site, practice

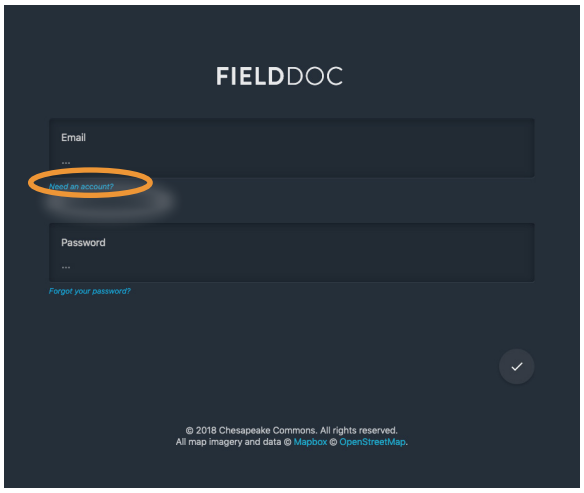
Delete
Deleting any component of your project is an irreversible action.
available for project, site, practice

Batch Delete
Delete multiple sites or practices simultaneously. Deleting is irreversible.
available for project, practice

Step 1. Register for a FieldDoc account

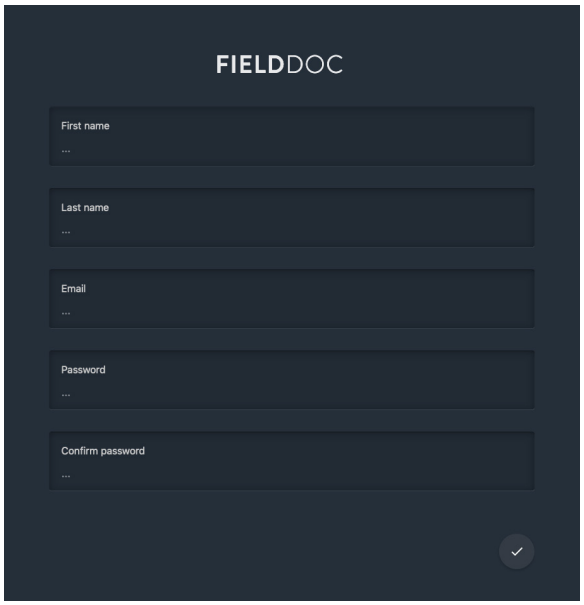
Create an account to enter FieldDoc. Once you have set up your account you can explore all of FieldDoc's features and start setting up your own projects to track and manage.

TIP: Multiple users can collaborate on the same project. Each user can create a single account rather than sharing log-in information.



Navigate to Registration Page

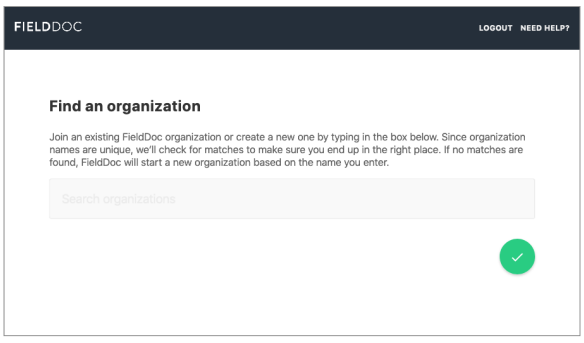
Create your user account at https://www.fielddoc.org/register or from the log-in page.



Enter the required fields

Enter a valid email address, first name and last name, organization, and password to create your account.

The check mark will turn green once all fields are completed. Click that check mark to save your account.



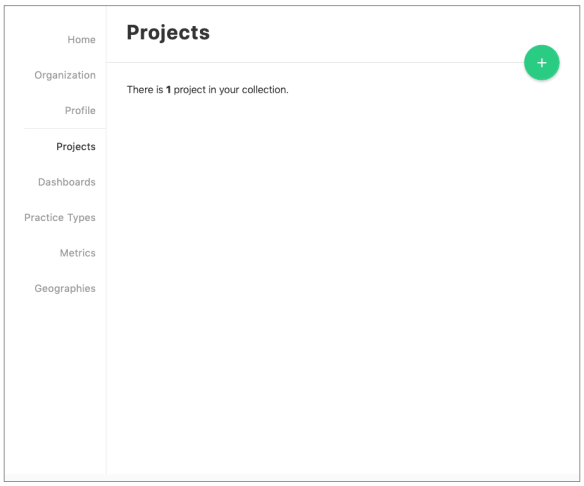
Select your organization

Find or add your organization to associate it with your account.

Click the green check mark and you're ready to start tracking your restoration work!

Step 2. Build your project summary page

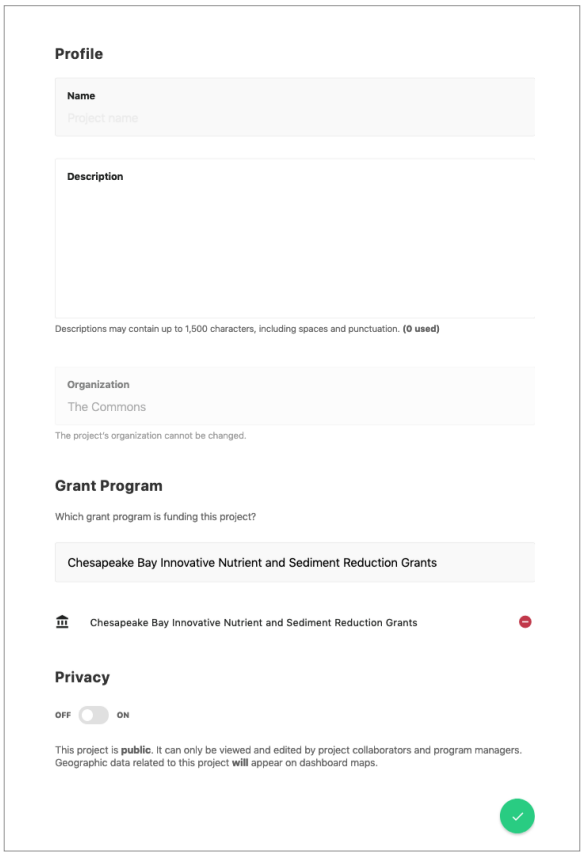
Each **project** should encapsulate all of the work being funded by a specific funder through a single grant. Projects house overall project information along with sub-sections to identify sites and restoration practices implemented at each site.



TIP: You can add multiple projects and navigate between all projects via the Project tiles on your landing page.

Start a New Project

Log onto your FieldDoc.org account. Users always start at the Home page. From here, click “Projects” and then clicking the green + circle will let you create a new project in the upper right-hand corner.



TIP: Each project can only have one associated Grant Program.

Enter Project Summary Details

Name

Replicate the application title and include the 5-digit Easygrant ID.

Description

Use the description provided in your award

Organization

Uneditable and pre-populated via user account

Grant Program

Type to search for your funding opportunity. The selected program populates the relevant practice types, metrics, and models.

Privacy

Privacy settings will still allow program managers to see all location information.

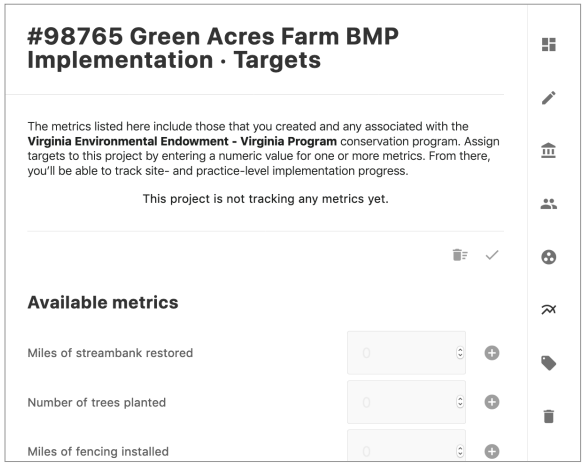
save your inputs

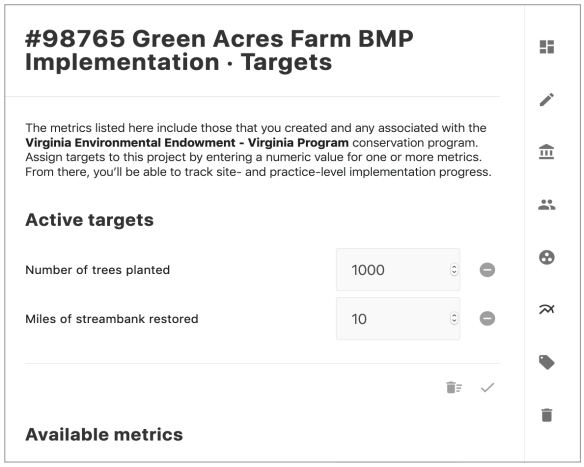
return to dashboard

Step 3. Add project-level metrics

Before you further build out your project, you must select **target metrics** for the overall project. Metrics will only be available to select at the **practice level** if they have been added on the **project metric page.**

TIP: Only add "Estimated reduction" in N, P, or TSS (custom) if you want to add a custom target reduction for these pollutants. FieldDoc will automatically generate and display the calculated estimated reductions on each Practice's individual metrics page.





Select Project Target Metrics

Click on the metrics icon on the Project Summary Dashboard.

Find a metric to include from the available list.

Your metrics list should match the metrics reported in Easygrants.

Enter in the total target metric number in the empty field and then click the plus sign to add it to your shortlist.

REPEAT until you have added all targets associated with your project that **the funding program** has asked you to track.

After you've added your metrics, they'll appear within your "Metrics" box on your project summary page.

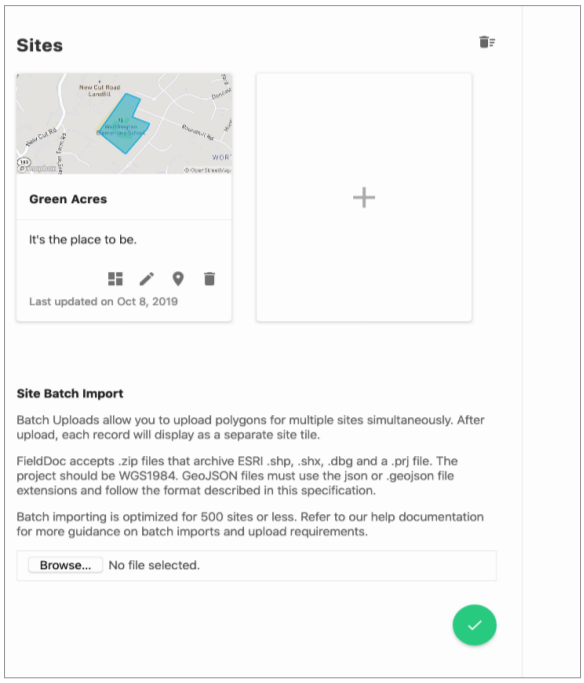
Click the dashboard icon to return to your project summary dashboard.

save your inputs

return to dashboard

Step 4. Add sites to your project

Sites identify the location of one or more practices. From your **project summary dashboard**, click the plus sign under **Sites** to add sites individually or use the **Site Batch Importer** to upload multiple sites simultaneously. Repeat for more sites.



TIP: The sites will include the polygon, so you can skip step five in these instructions.

Option 1. Click the plus sign to add a site

On your project summary page, click the plus sign under Sites to add a new site.

Create additional sites within your project as separate tiles.

Option 2. Import multiple polygons

The importer allows you to create multiple sites simultaneously. The importer accepts .zip files with archived ESRI files: .shp, .shx, .dbg, and a .prj (WGS1984). The system is optimized for 500 sites or less.

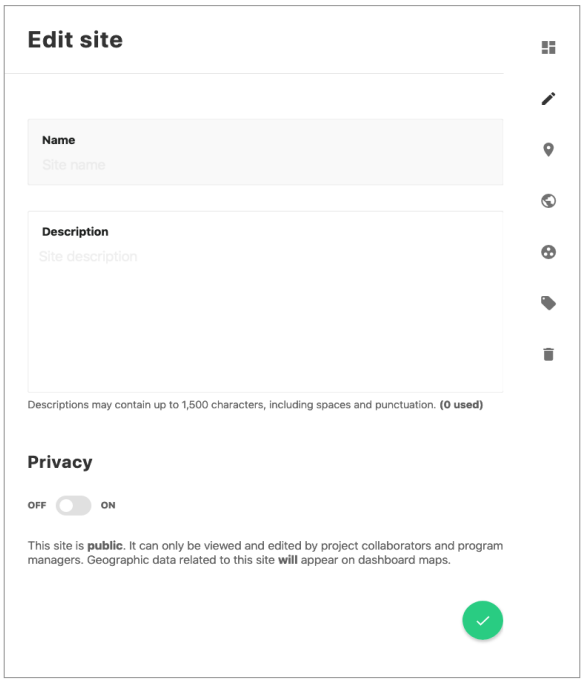
FieldDoc will separate each polygon as a separate site location that will appear as a unique tile in FieldDoc.

Once you have imported your file you will edit each site to add a description and confirm the site name.

Next you will add details to your site and add practices to your sites.

Step 5. Enter your site details and location information

Name your **site**. Each site also needs a corresponding polygon to delineate its boundaries. **The RFP** asks that you create sites that outline the parcels where practices will be implemented. Polygons can be drawn directly on the map or uploaded.



Add details for your new site

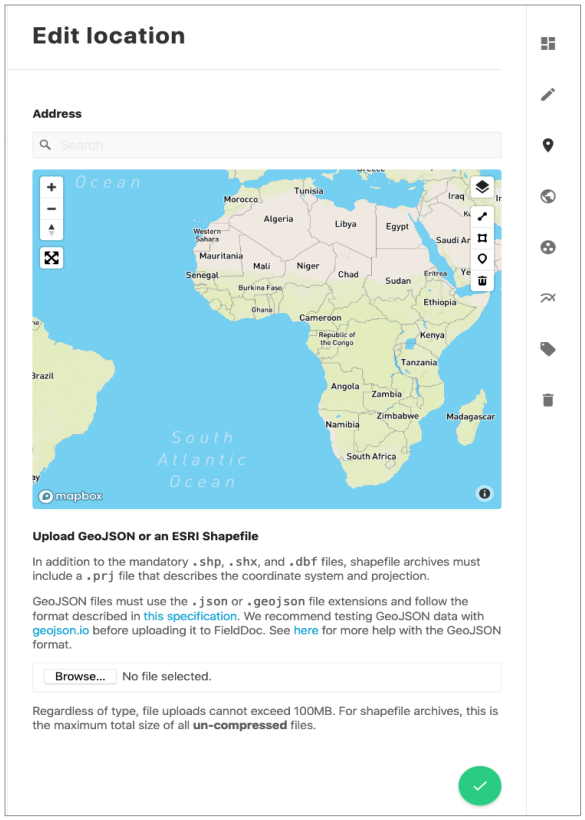
Name
Enter site name

Description
Describe the parcel location.

Privacy
Public = Off, Private = On. Private will still allow program managers to see site locations.

save your inputs

return to dashboard



Option 1. Draw your polygon.

Use the address finder to zoom in on the map. Click on the Layers Icon and switch the basemap to “Satellite” in order to better delineate a parcel boundary.

Then use the Polygon tool to draw the location boundary. Click the green save button to confirm the location.

Option 2. Upload your polygon.

Any ESRI shapefile upload must be packaged as a a .zip file that includes the following: a .shp, .shx, .dbf, and .prj file. The coordinate system and projection should be WGS1984.

Each file can only have one record associated with it. If your file includes multiple polygons make sure to dissolve the features into one record.

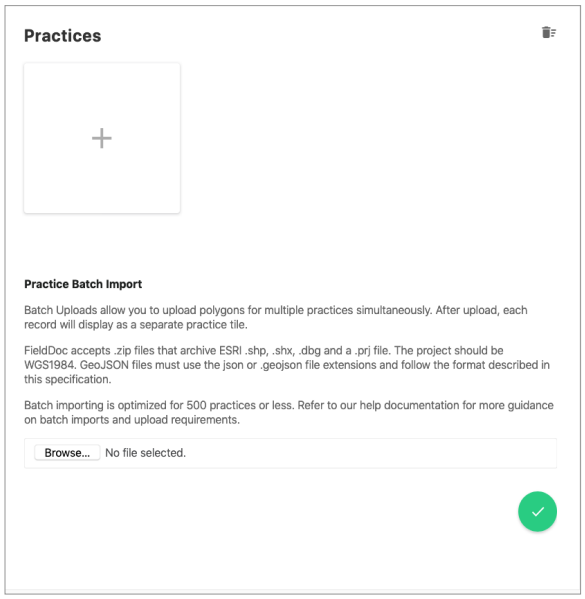
TIP: If your polygon does not appear on the map, try uploading and re-exporting the file through mapshaper.org.

save your inputs

return to dashboard

Step 6. Add Practice(s) to your site

Once you have at least one site associated with your project, you can start entering specific practice data to that site. Practices refer to the on-the-ground restoration work you and partners will complete through the life cycle of the funded project.



TIP: While we don't recommend it, multiple polygons will appear as one practice if they are dissolved into one record the uploaded file.

Option 1. Add practices individually

On your site summary dashboard, click the plus sign under **Practices** to add a new practice.

Create additional practices within your site as separate tiles.

Option 2. Import multiple practices

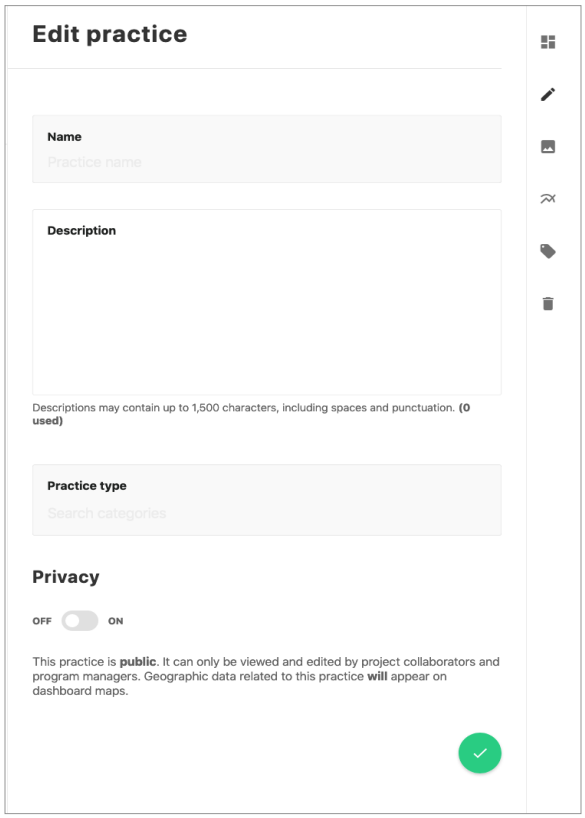
The importer allows you to create multiple practice tiles simultaneously. The importer accepts .zip files with archived ESRI files: .shp, .shx, .dbg, and a .prj (WGS1984). The system is optimized for 500 sites or less.

FieldDoc will separate each polygon as a separate practice that will appear as a unique tile in FieldDoc.

Once you have imported your file you will enter into each practice tile to add a description, select the **Practice Type** and confirm the practice name.

Step 7. Add Practice Details to your site

Practices house your target metric progress and modeled calculation information. From your **site summary dashboard**, click the plus sign under **practices** to add your first Practice. Repeat these steps to add multiple practices to your site.



Add details to your new practice

Name

Give your practice an easy-to-reference , identifiable name.

Description

Describe your practice, if needed here.

Practice Type

Find and select the practice type from the provided list. You must use one of these practices in order for the models to calculate the estimated reductions. If you do not see your practice listed here, contact your program manager.

save your inputs

return to dashboard

IMPORTANT NOTE

FieldDoc calculates the estimated redcutions to sediments and nutrients based on three inputs:

the Practice Type,

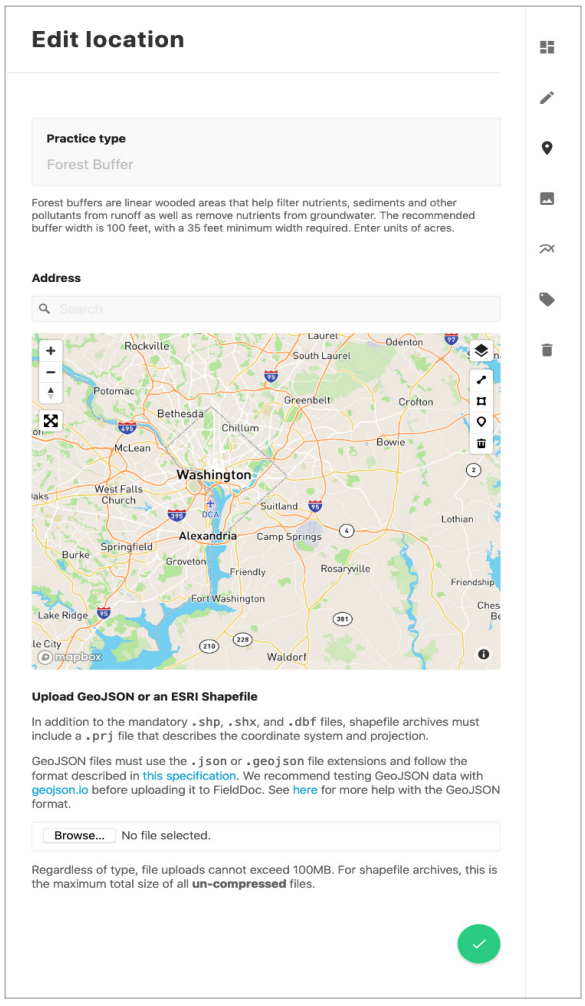
the Land-River Segment, and

the practice extent, which is often the acreage.

You must choose a practice type from the FieldDoc list in order for any models to calculate estimated pollution reductions. Refer to the descriptions for more detailed instructions and information for each option.

Step 8. Add Location polygon to your practice

Refer to the **Practice Type** description to confirm how to delineate your practice area. All practices **locations** must be drawn as polygons. If you used the **import** feature to upload multiple practices, this step should already be complete.



Option 1. Draw your polygon.

Use the address finder to zoom in on the map. Click on the Layers Icon and switch the basemap to “Satellite” in order to better delineate a parcel boundary.

Then use the Polygon tool to draw the location boundary. Click the green save button to confirm the location.

Option 2. Upload your polygon.

Any ESRI shapefile upload must be packaged as a a .zip file that includes the following: a .shp, .shx, .dbf, and .prj file. The coordinate system and projection should be WGS1984.

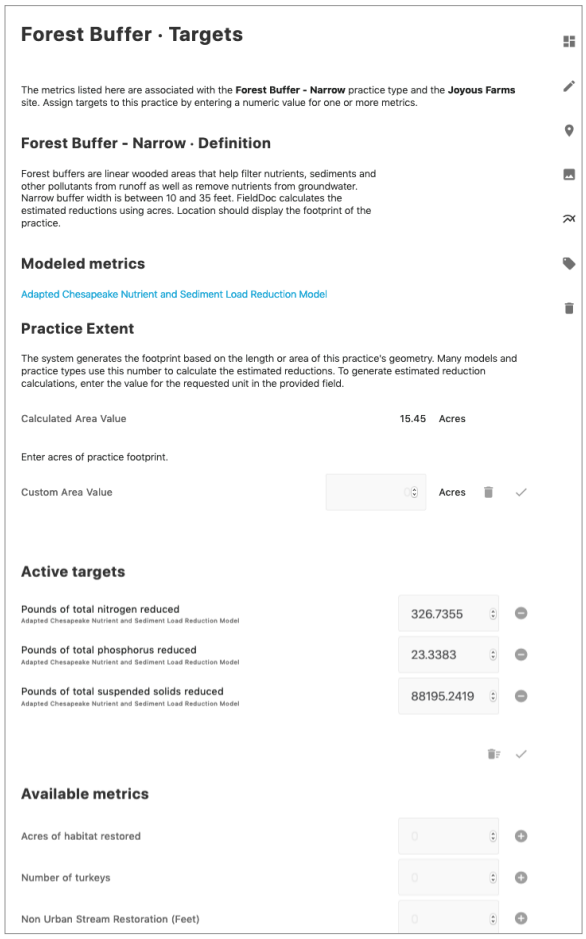
Each file can only have one record associated with it. If your file includes multiple polygons make sure to dissolve the features into one record.

save your inputs

return to dashboard

Step 9. Add Practice Metrics

Add the **metrics** from the list that you assigned to your project on the project metrics page. For practices where additional inputs are required, like streambank restoration, you can find those fields here. Reduction calculations will appear here.



Calculate Reductions and Add Targets

Click on the metrics icon on the **Practice Summary Dashboard**.

The practice's estimated reductions in N, P, and TSS will appear after a practice type and polygon have been entered. These are not editable.

Practice Extent

The practice extent displays the footprint calculated by the practice location input. Enter the custom value in the unit requested in order to calcuate the estimated reductions. Click the check mark to save and the **Active Targets** will calculate.

Available Metrics

Add additional metrics to this practice, select a metric to include from the list of **Available metrics**.

Enter in the "goal" target metric number in the empty field and then click the plus sign to add it to this practice's shortlist.

REPEAT until you have added all targets associated with this practice.

After you've added your metrics, they'll appear within your "Metrics" box on your practice summary dashboard.

save your inputs  return to dashboard 

Step 10. Add Implementation Report

Documenting progress towards completion occurs through Reports that are found at the foot of each individual practice dashboard. Multiple reports can be entered per practice and progress towards target metric goals are captured here.

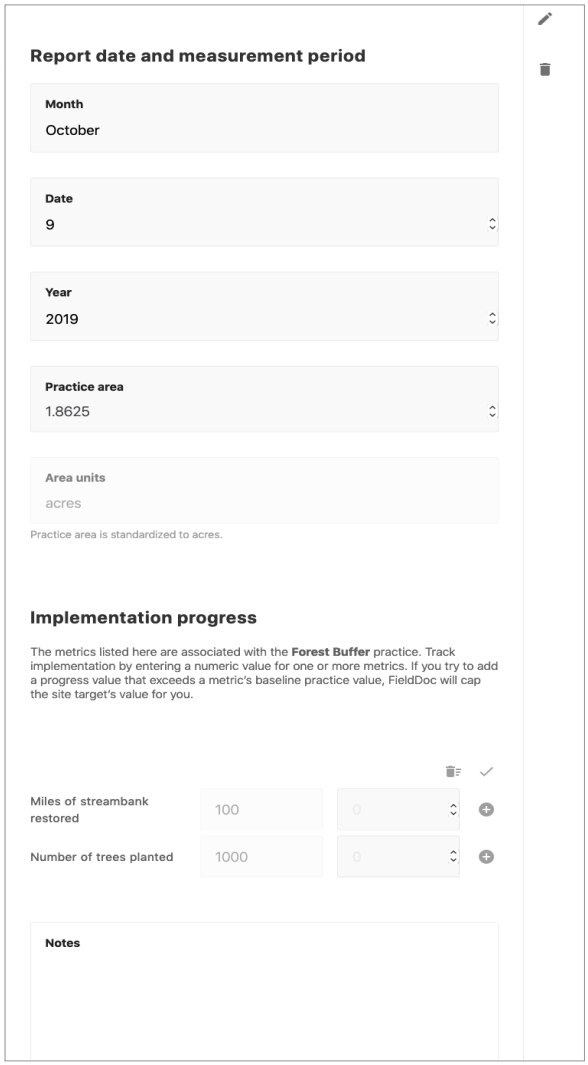
Click the plus sign to add a report

On your practice summary dashboard, click the plus sign under Reports to add a new implementation report.

Create additional reports within your practice as separate tiles.

Step 11. Complete an installation report

Each report will show progress towards your target metrics and any notes that you want to share. Estimated reductions will always return a 100% complete value, so no progress can be shown towards those estimates.



Click the plus sign to add a report

Implementation Progress

Select the metrics that you implemented during the reporting period and add them to your progress report.

Enter the progress made towards individual target metrics.

Add any additional notes to the report.

save your inputs

return to dashboard

Repeat, Restore, Report

Repeat the steps to add additional sites and practices to your project. Return to your project and drill down to each practice to enter in installation reports.

Where to go for help

This **Getting Started Guide** skims the surface of how to use FieldDoc to track your restoration work and its impact on reducing pollutants.

For more information, check out our online help documentation to read detailed articles on all components of FieldDoc and watch videos walking through the project build process.

If you're stuck, reach out to your program officer:

Sydney Godbey
sydney.godbey@nfwf.org

Frequently Asked Questions

Answers to some of our most common user questions, compiled in one easy-to-reference list!

What if I don't know the exact locations?

That's OK. Please enter in representative sites that estimate the total acreage that will be under the new practice. Sites should be placed in the county where work will actually take place, in an effort to capture the correct land-river segment in the model calculations.