

FIELDDOC USER GUIDE 2023

FieldDoc is a product of



Welcome to FieldDoc

Project implementation tracking is a critical and carefully managed 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 implementors and funding 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 the instructions for project implementors on the use of configuring projects and practices in the FieldDoc platform. Use this guide to create an account and fill out your project details; select and delineate practice installation sites; calculate estimated reductions; and, track progress towards implementation. Additional online help documentation and videos are available at help.fielddoc.org.

Funding Programs that use FieldDoc may provide supplemental, program-specific, guidance as well.

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

Let's get started!

NOTE: The Commons edits this guide regularly to reflect the latest system updates. This version reflects system updates made through March 2023. Additional information and videos can be found at help.fielddoc.org.

Icon library

The following list of icons and a brief description provides an overview of all icons you might encounter throughout FieldDoc. Familiarize yourself with them here so you can move around the system and build your project faster.



Add image

Add photos of the practice location, such as before and post-installation.

Available in Projects, Practices, Reporting



Base layer

Build custom filters from the atlas of projects within a program or portfolio.

Available in Map displays



Collaborators/Members

Each person that you add can access and edit all components of your project.

Available in Projects



Copy

Copy practices that report the same target metrics within a project.

Available in Practices



Delete

Deleting any component is an irreversible action in the FieldDoc system.

Available in many sections



Documents

Review all photos and files uploaded to a project summary.

Available in Projects and Reporting



Edit

Edits can be made for summary information. The change log captures edits.

Available in many sections



Edit location

Draw, upload, or edit a geometry within each practice.

Available for Practices



Exports

Export a .CSV or Geo-package of all information at the practice scale.

Available for Projects, Programs



Home

Returns user to their overview page which displays the portfolio or work.

Available for all Users



Maps

Build custom filters from the atlas of projects within a program or portfolio.

Available in Projects, Programs



Edit report

Track goals, model inputs, and installation progress for each practice.

Available for Practice



Organization

Account information that ties projects and users together. Manage membership and status.

Available for all Users



Partnerships

Associate outside organizations providing match with your project.

Available for Projects



Polygon draw

Draw polygon of your practice location on the location edit page.

Available on Practice & Site Edit Location page

Icon Library, continued



Practices

Explore your list of practices created within projects.

Available on General Users Home



Practice list

Curate a programmatic list of available practices for general user application.

Available in Programs



Print

Save a PDF of your page. This can be shared to external viewers.

Available for Project, Practice



Program

Curate a programmatic list of available practices for basic user application.

Available on Projects pages



Profile

Individual to each user, confirms basic account information.

Available for all Users



Projects

Delivers user to a portfolio of all projects the user has permissions to view.

Available for Account



Save

Save your work using the check mark. FieldDoc does not save work automatically.

Available in many sections



Tags

Program managers can create and assign tags to filter and organize projects.

Available for Project, Practice, Program



Upload file

Upload external, filed information to your project page.

Available for Project



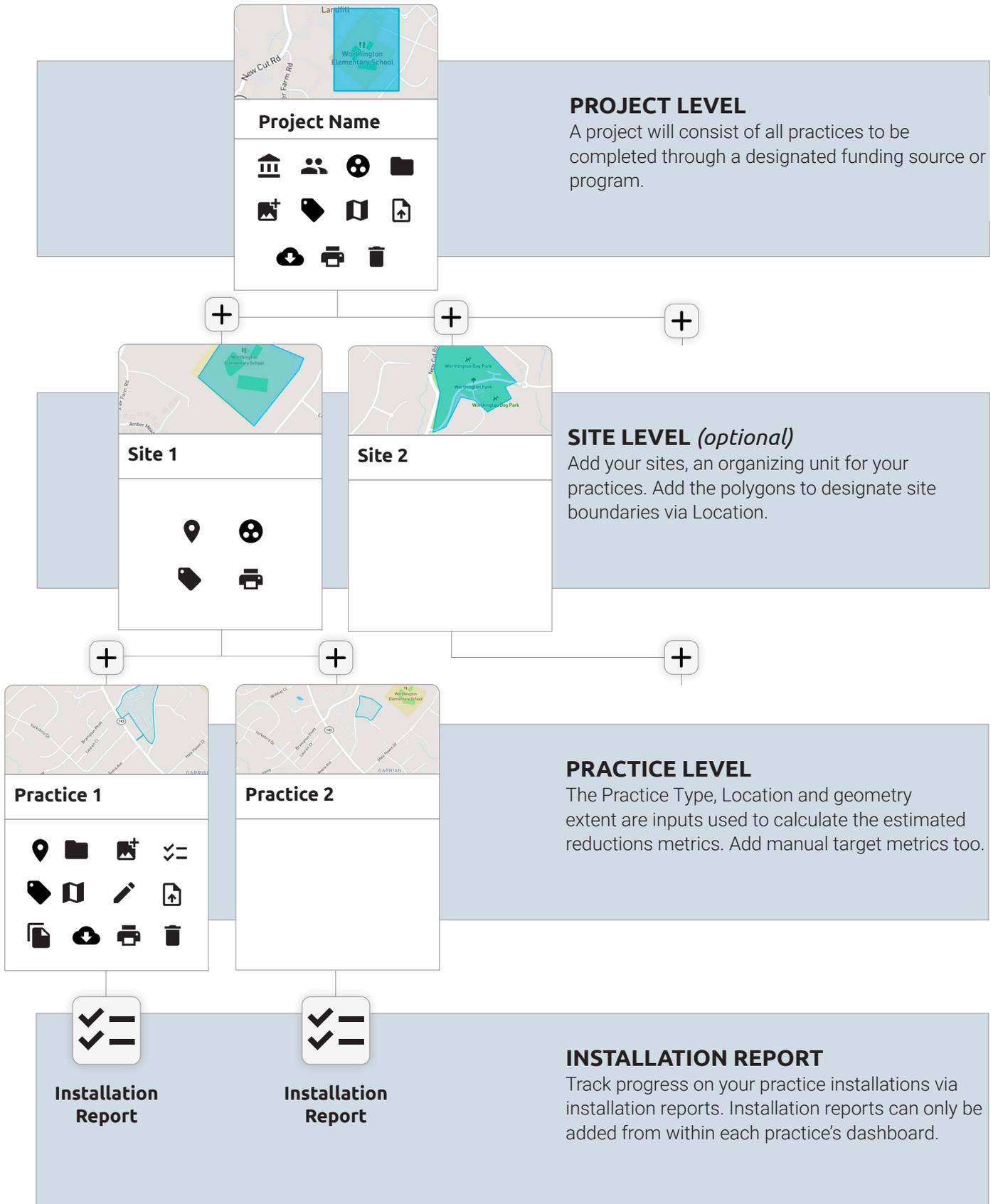
View summary

Summary pages collect all information inputted into that section.

Available for Project, Practice, Program

FieldDoc System Structure

The components of each FieldDoc project fit together to build out your work and track your installation progress via metric targets.



Step 1.1 | Register for your FieldDoc account

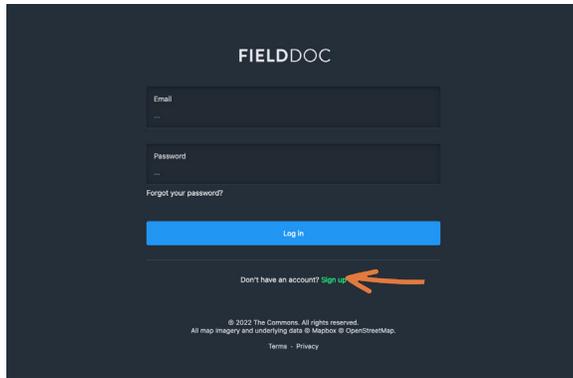
Create an account to enter FieldDoc. Once you have set up your account you can explore all of FieldDoc’s features and start setting up your own projects to track and manage.

TIP: Multiple users can collaborate on the same project. Each user must create a single account. You should not share log-in information.

TIP: Use your work email address for an easier set up process.

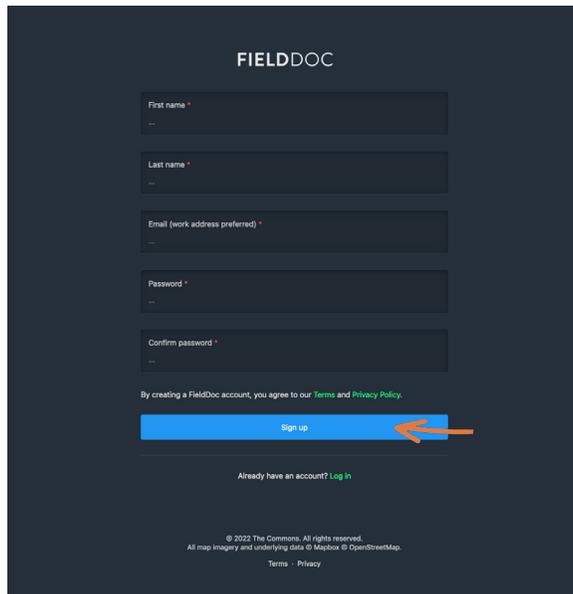
TIP: If you are an organization owner, you will need to approve or reject requests to join your organization.

TIP: Only staff or volunteers at your organization can be part of your organization.



Navigate to Registration Page

Create your user account at <https://www.fielddoc.org/register> or from the log-in page, click **Sign Up** to register.

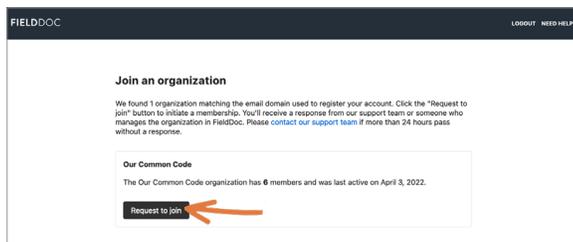


Enter the registration required fields

Enter First name, Last name, a valid email address, and password to create your account.

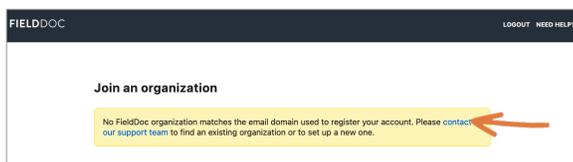
Tap the **Sign Up** button to move to the next step of the registration process. Every user must be associated with an organization.

All users must be associated with an organization. The system will reference your email to determine and suggest an organization for you to join or ask you to get in touch with support to create a new organization in the system.



View 1. Request to join your organization

The system will recommend an organization to join based on your email domain name. Click **“request to join”**. An email will be sent to existing organization owner(s) who must then approve your request. Upon approval you can begin entering projects.

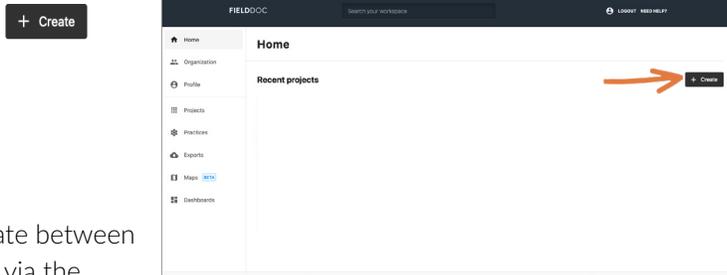


View 2. Add your organization

If your organization is not yet in the system or we cannot determine your organization based on your email address, you should contact support@fielddoc.org. A new organization will be created for you.

Step 2.1 | Build your project

Each project represents the agreement for the installation work. Projects house information to track and report individual practices and sites, associated with a single grant agreement.



TIP: Navigate between all projects via the Project tiles on your landing page.

Enter a name for this project.

Select a program supported by FieldDoc (required for project setup).

Search programs

Cancel OK

Programs / Chesapeake Bay Small Watershed Grants / Projects / #000 User Guide Restoration Project / Edit project

Edit project

Name
#000 User Guide Restoration Project

Description

Descriptions may contain up to 1,500 characters, including spaces and punctuation. (0 used)

Organization
Our Common Code

The project's organization cannot be changed.

Privacy
Off On

This project is private. It can only be viewed and edited by project collaborators and program managers. Geographic data related to this project will not appear on dashboard maps.

Save

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

Start a New Project

Log into your FieldDoc.org account. You will arrive at your Home page. From here, click **Projects** on the left hand panel to access all projects in your portfolio.

Click the **[+ create]** button in the upper right hand corner to start building a new project.

Name your project

Enter your project title.

Search for the correct grant program in the Search programs field.



Description

Enter a description that matches your role as affiliated with your grant.

Organization

Will pre-populate with user account.

Grant Program

Each program displays a separate list of practices, metrics, and models.

Privacy

Choose whether or not to keep the privacy setting off.



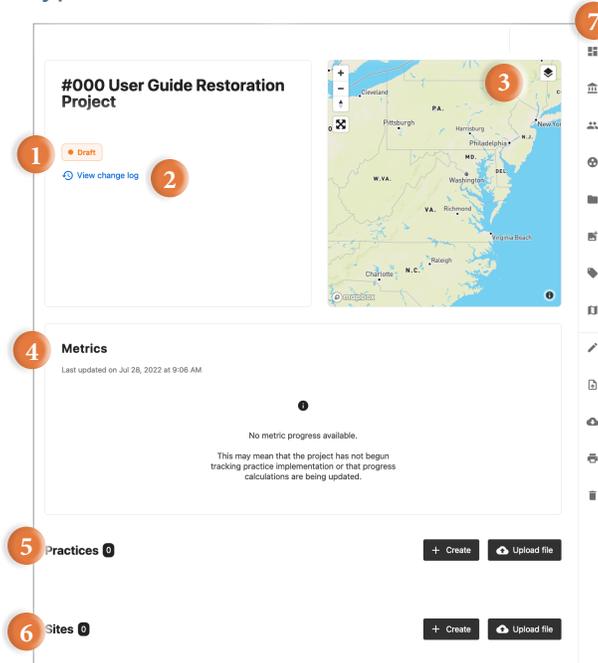
Navigate to your project summary

Click the summary icon to enter into your project. Next we will add practices.



Step 3.1 | Project level summary page

Before you add your implementation information, let's take a quick tour of your project summary page. Your summary page will update as you add your practices' type, location, and metric information.



Project Summary page overview

1. Status

All projects begin a drafts. A program administrator will change the status if they select your project for funding.

2. Change Log

Check the change log to review any edits made to your project.

3. Map

The map will zoom in to your project area as your add locations to your practices and/or sites.

4. Metrics

Metric targets added at the practice level appear in summary on this page. Indicate progress in practice reports.

5. Practices

Practices available for use are unique to each funding program in FieldDoc. Follow instructions in Step 6 to add all practices individually or in a batch upload.

6. Sites (optional)

Sites are an organizational feature that users with large projects may choose to use. Follow instructions in Step 4 to add site locations individually or in a batch

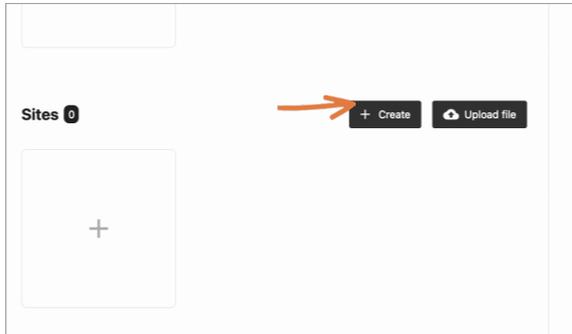
7. Right Side Panel

Use the right hand panel of icons to navigate to additional project-level input options.

	Program	Confirm or change funding program tied to the project
	Collaborators	Add additional members to manage the project
	Partners	Document match sources and amounts
	Documents	Access documents uploaded to the project
	Add Images	Upload .jpg images of the project
	Tags	If relevant, select tags to associate with your project
	Map	View a map of your project footprint
	Edit	Edit your Project name and description
	Upload	Confirm or change funding program tied to the project
	Print	Confirm or change funding program tied to the project
	Delete	Confirm or change funding program tied to the project

Step 4.1 | Add sites to your project *(optional, go to step 5 if skipping)*

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.



+ Create

Enter a name for this site.

Cancel OK

Upload file

Tips

In addition to the mandatory **.shp**, **.shx**, and **.dbf** files, shapefile archives must include a **.prj** file that describes the coordinate system and projection. All files must be compressed into a **.zip** file before uploading. To ensure that FieldDoc reads the archive correctly, the archive itself and the files it contains should share the same name. File names must not contain spaces.

GeoJSON files must use the **.json** or **.geojson** file extensions and follow the format described in [this specification](#). We recommend testing GeoJSON data with [geojson.io](#) before uploading it to FieldDoc. See [here](#) for more help with the GeoJSON format.

FieldDoc uses the World Geodetic System (WGS84, EPSG:4326) as its reference coordinate system. FieldDoc does not support other coordinate systems or projections.

Regardless of type, file uploads cannot exceed 20 MB. For shapefile archives, this is the maximum total size of all **un-compressed** files.

Batch import is optimized for 100 sites or fewer. Refer to our [help documentation](#) for more guidance on batch imports and upload requirements.

Browse... No file selected.

Cancel Upload

Sites can refer to a specific parcel or organizational unit such as a county. Sites only display the polygon and do not contain any metric information.

Option 1. Create individual sites.

On your project summary page, tap the **+ Create** to create an individual site.

Name your site and tap **OK**.

Return to the project summary page to create additional sites within your project.

OK

Option 2. Upload multiple polygons

The importer allows you to create multiple sites simultaneously. The importer accepts .zip files with archived ESRI files: .shp, .shx, .dbf, 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 then add practices.

Upload

Step 4.2. | Enter your site details and location information

Name your site. Each site also needs a corresponding polygon to delineate its boundaries. Your site should outline the parcels where you will implement practices. Polygons can be drawn directly on the map or uploaded.



Edit site

Name
Demo Farm

Description
Site description

Descriptions may contain up to 1,500 characters, including spaces and punctuation. (0 used)

Privacy
Off On

This site is **private**. It can only be viewed and edited by project collaborators and program managers. Geographic data related to this site **will not** appear on dashboard maps.

Save

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. Private sites will not appear on dashboard maps.

Click **Save** and then click on the location icon.



TIP: If your polygon does not appear on the map, try to dissolve multiple polygons to one layer or uploading and re-exporting the file through mapshaper.org.

Edit location

Address
Search

Estimated site extent
Unable to calculate estimated extent. The site geometry is missing or invalid.

Draw site location
If you do not have GeoJSON data or a shapefile of your site area then you can draw your site directly on the map. To draw a polygon, select the square polygon draw tool, second from the top of available tools. Estimate your site area and double click to complete the shape. FieldDoc uses the delineated polygon area to perform model calculations.

Upload GeoJSON or an Esri Shapefile
In addition to the mandatory .shp, .shx, and .dbf files, shapefile archives must include a .prj file that describes the coordinate system and projection. All files must be compressed into a .zip file before uploading. To ensure that FieldDoc reads the archive correctly, the archive itself and the files it contains should share the same name. File names must not contain spaces.
GeoJSON files must use the .json or .geojson file extensions and follow the format described in this specification. We recommend testing GeoJSON data with geojson.io before uploading it to FieldDoc. See here for more help with the GeoJSON format.
Regardless of type, file uploads cannot exceed 20 MB. For shapefile archives, this is the maximum total size of all un-compressed files.

Browse... No file selected.

Save

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 blue save button to confirm the location.

Option 2. Upload your polygon.

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

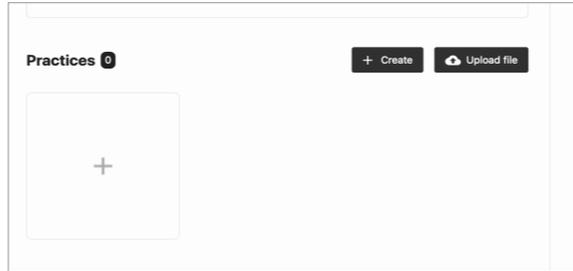
Each file can only have one record associated with it. If your file includes multiple polygons make sure to dissolve the features into one record.



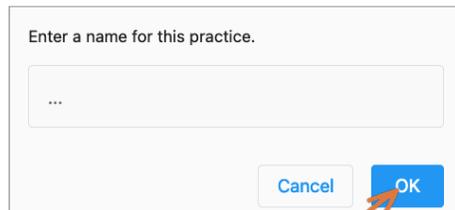
Step 5.1 | Add Practice(s) to your project (required)

Practices refer to the on-the-ground restoration work, or BMPs, to be installed during the project period. From your project summary page, click the plus sign under practices to add each practice.

TIP: Each practice type description indicates if FieldDoc has linked a model to it.



Each practice you implement will need its own tile. Repeat these steps to add multiple practices to your project.

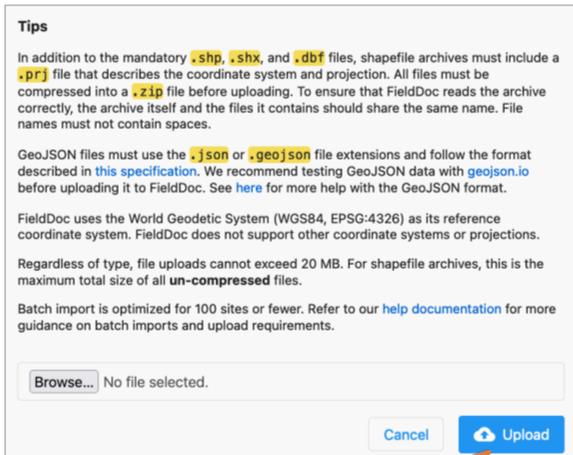
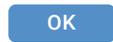


Option 1. Add practices individually

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

Name your practice

To get started, give your practice an easy-to-reference name and tap OK. This name is not tied to anything in the system but will help you refer back to the practice throughout the project period.



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, .dbf, 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.

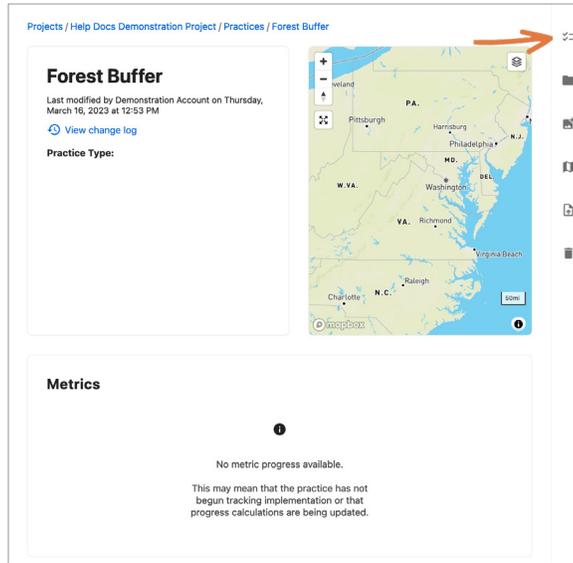


Step 5.2 | Add Practice Details to Report Editor

The following steps walk through the components of setting up a single practice. Practices must include location, footprint, modeled calculations, and metric targets.



TIP: Each restoration practice will require a separate entry and file.



Enter Edit Reports

All practice information is entered in the **Edit Reports, Settings** tab. New input fields will appear as you add components.

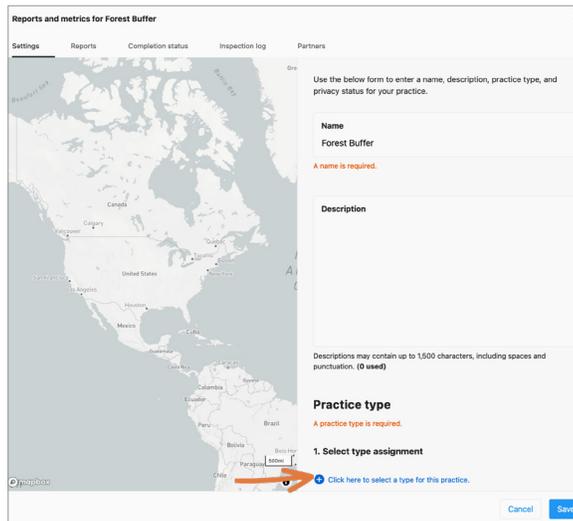
Name. Give your practice an easy-to-reference, identifiable name.

Description

Describe your practice here.

Practice Type

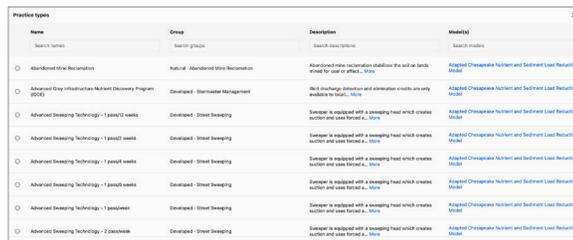
Click the link to search through and select a practice type. Each practice will have individual instructions for what inputs are required to calculate the estimated reductions. Each program has a curated list of practices. If you do not see your desired practice listed here, contact the program manager.



Select practice type

Enter into the practice type list. Scroll or search through the program's list to select your practice type.

Review the description to confirm you have selected the most relevant practice. Each practice type has a unique list of metrics and model calculations tied to it.



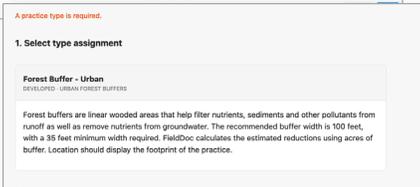
Click the circle to select the practice and then click **Save**. Save

You will be returned to the Edit Reports Summary page. The practice type will appear as well as more input fields to complete.

IMPORTANT NOTE:

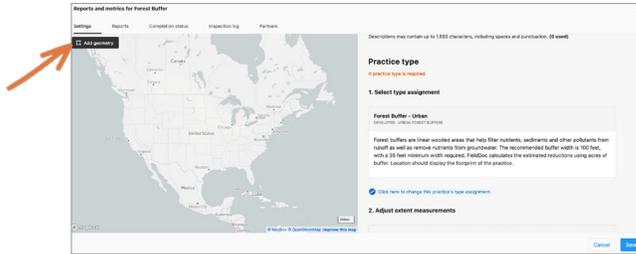
For most practice types, FieldDoc calculates reductions to sediment and nutrients based on the practice type, the land river segment, and the practice extent, which is often acreage.

Some practice types may require additional inputs. These additional steps appear on the metrics page, when required.



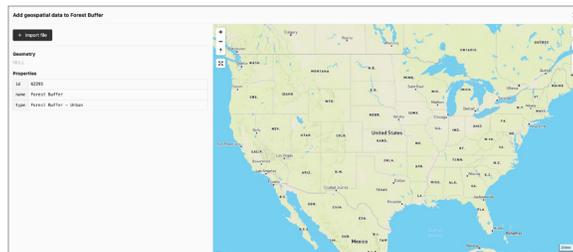
Step 5.3 | Add geospatial data to your practice

Next you will add your geospatial data to your practice. You can draw your geometry directly in FieldDoc or upload a shapefile. Only one feature can be added to each practice and the geometry type is determined by the selected practice.



Click the “edit geometry” button

You will be brought to the FieldDoc Map Editor page, where you have options to draw your geospatial data directly on the map or upload a pre-configured geospatial file.



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 available **draw tool** to draw the location boundary. Click **save changes** button to confirm the location.



Option 2. Import file

Any ESRI shapefile upload must be packaged as 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.



Review geospatial data

Make sure to save your work. Once saved, you can review the source data and view measurements. This information is provided as a courtesy for easy review.

Once you are satisfied with the geospatial data, close out of the map editor by clicking the “x” in the upper right hand corner.

Step 5.4 | Enter additional inputs

Most practice types require a geospatial component in order to run attached models. Once your geospatial component has been added additional fields appear for you to review and enter input information.



2. Adjust extent measurements

FieldDoc calculates extent based on the dimensions (area, length, etc.) of a practice's geometry. Many models and practice types use this number to calculate estimated nutrient and sediment reductions and other modeled parameters.

FieldDoc uses the World Geodetic System (WGS84, EPSG:4326) as its reference coordinate system. Note that the estimated extent value produced by FieldDoc may differ from values produced by other systems that process geospatial data. Please use the "Custom" input below if you need to override the FieldDoc-generated extent.

Estimated area
6.18 acres

Custom area
 acres

Adjust extent measurements

After adding your practice's location extent, return to the Edit Report Summary page. Next you will review the estimated area, calculated based on your geometry. If you need to enter in a custom area, enter it here. Click Save.

Save

3. Map to NEIEN best management practice specification

Align practice metadata and implementation measurements with Environmental Information Exchange Network specifications. This step enables implementation tracking and crediting by state governments and the U.S. Environmental Protection Agency.

[Click here to select a best management practice from the NEIEN appendix.](#)

Measurements

Select a NEIEN best management practice to add measurement entries.

Select NEIEN specification

Urban Forest Buffer (forestbufurban)

Cancel Save

Measurements

Acres	0.00	ACRE	...
Area Planted	0.00	ACRE	...
Impervious Area Planted	0.00	ACRE	...
Buffer Length	0.00	MELES	...

Edit measurement

Delete measurement

Adjust measurement

Acres

Enter a new value.

Cancel Save

Map to NEIEN

Align your practice metadata and implementation with the federal Environmental Information Exchange Network specifications. Select your NEIEN specification. For details on which BMP to select, reference the NEIEN appendix.

Save

Measurements. All NEIEN-related fields appear. Click the ellipses to edit or delete a measurement.

Adjust Measurement. Enter in a new value to the measurement selected. Click Save.

Save

Repeat with additional measurements.

Step 5.5 | Complete implementation targets and outcomes



TIP: If your Metric Goal 'active targets' are all zero, click "save" at the bottom of the page or check for a "modify inputs" button.

TIP: Throughout the project period you will use FieldDoc Reports to demonstrate progress towards outcomes through your practice installation for non-modeled metrics.

4. Implementation targets and outcomes

Modeled metrics

Adapted Chesapeake Nutrient and Sediment Load Reduction Model

Pounds of total nitrogen reduced 79,85 pounds per year Calculated on Mar 20, 2023 at 10:11 AM	Pounds of total phosphorus reduced 6.41 pounds per year Calculated on Mar 20, 2023 at 10:11 AM
Pounds of total suspended solids reduced 20,185.87 pounds per year Calculated on Mar 20, 2023 at 10:11 AM	

Adjustable, non-modeled metrics + Add target

Acres with BMPs for nutrient and sediment reduction 6.18 Modified on Mar 17, 2023 at 12:20 PM	Acres with BMPs to control stormwater runoff 0.00 Modified on Mar 17, 2023 at 12:20 PM
Number of trees planted 0 Modified on Mar 17, 2023 at 12:20 PM	

Edit target

Delete target

Adjust metric target

Number of trees planted

Enter a new value.

500

Cancel Save

Site

Sites are an optional way to organize your practices. To use sites, first create one or more via the [project summary config](#). Please note that un-named sites will not appear in the dropdown list. If you do not wish to use a site with this practice, leave this field blank.

Search project sites

Privacy

Off On

This practice is **private**. It can only be viewed and edited by project collaborators and program managers. Geographic data related to this practice **will not** appear on dashboard maps.

Modeled metrics

Reference the model used for more information. Modeled metrics are non-editable; however, if you see a button that says "modify inputs" then you need to add more information before the outputs will calculate.

Save

Adjustable, non-modeled metrics

Program managers may assign additional non-modeled metrics for you to track as part of this practice installation.

- Click the ellipses to access the **edit target**.

Add your target outcome.

Save

Add more targets, if applicable.

You can add additional targets not listed, use the **+ Add Target** to select from the entire list.

Site (optional)

Search project sites to assign this practice to a site. This is an optional step.

Privacy

Changing a practice's visibility status to private means that the installation footprint will not appear on mapping applications. The practice metrics will still be included in program summary views and be visible to program managers.

Once all metric targets and model inputs are entered, you have completed the practice set up process. Return to your project summary page to add more practices to your project.

Save

Step 6 | Review all information entered appears on your practice summary

The Practice summary page includes location, footprint, modeled calculations, and metric targets that you entered during your practice set up. This information rolls up to the project summary page and program page. The information will update as you add reports throughout the practice installation period.

Project

Forest Buffer
 Last modified by Conservation Assistant on Monday, March 20, 2023 at 10:11 AM
[View change log](#)

Practice Type: Forest Buffer - Urban
 Practice Area Extent: 6.16 Acres
 Forest buffers are linear wooded areas that help filter nutrients, sediments and other pollutants from runoff as well as remove nutrients from groundwater. The resource-based buffer width is 100 feet, with a 25 foot minimum width required. FIELDDOC calculates the estimated reductions using acres of buffer. Location should display the footprint of the practice.



Metrics

Adapted Chesapeake Nutrient and Sediment Load Reduction Model
 The following metric values were generated using data and equations supplied by the Adapted Chesapeake Nutrient and Sediment Load Reduction Model. Model. You can find more information about the model [here](#).

	Estimated Value
Pounds of total suspended solids reduced	20,185.87 pounds per year
Pounds of total nitrogen reduced	79.89 pounds per year
Pounds of total phosphorus reduced	6.43 pounds per year

	Modelled Target	% Targeted	
Acres with BMPs for nutrient and sediment reduction	0.00 acres (0%)	0%	<input type="radio"/>
Number of trees planted	0.00 (0/100)	0%	<input type="radio"/>

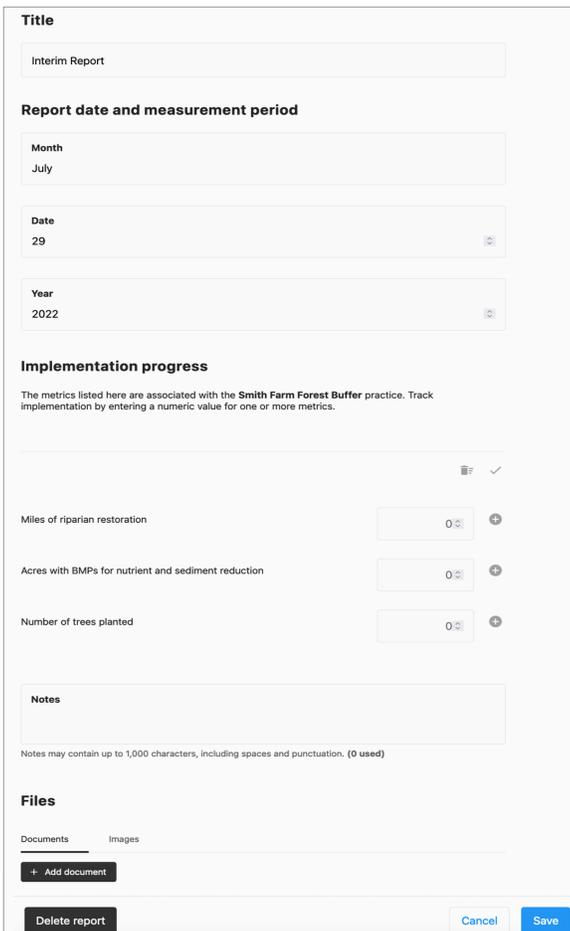
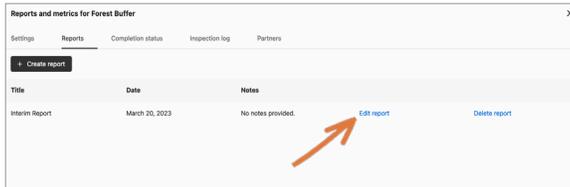
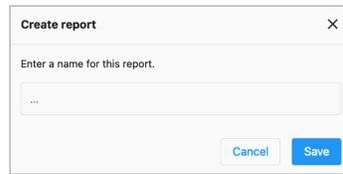
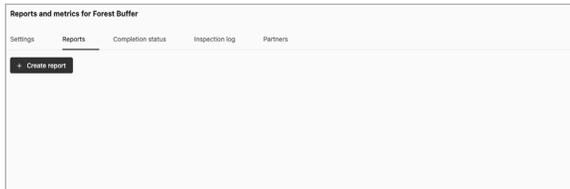
Territories

The practice is located in a significant geographic area. The territory shown here is model calculated as well as project-level information gaps and strategies.

INVEST14_2304_2000
 Last time assigned

Step 7.1 | Add Implementation Reports

Through a project installation period, use Reports to document progress towards project completion. Add reports individually within each practice.



Create a Report

Within the practice's **Edit Reports**, click on the **Reports** tab.

Click **+ Create Report** button.

Name your report.

Click **Save**. The Report has been added to your Report list.

Click **Edit report** to add progress and notes to the report.

A new page in the modal will load where you can add all of your information for reporting.

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. Make sure to click the "+" circles next to each metric to add them to the report.

Important. Once you have added all metrics, click the check mark that appears. Progress bars appear below each metric.

Notes.

Add any additional notes to the report.

Files. Upload any documents or Images that you would like to attach to this report.

Click **Save**.

Step 7.2 | Implementation report, continued

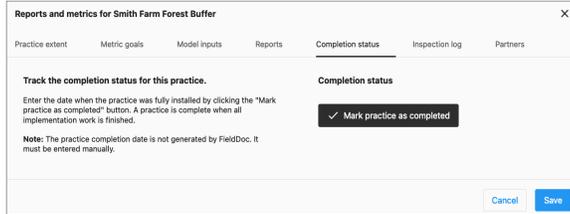
Title	Date	Notes		
Interim Report	March 20, 2023	No notes provided.	Edit report	Delete report

Click **Create report** to add additional reports.

Most practices will have, at minimum, an interim and final report added to the practice.

Step 8 | Mark practice installation “complete”

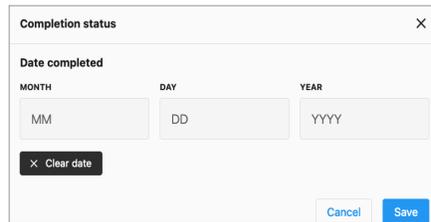
Track your completed installations by using the “Completion Status” tab. Also found in the reporting module, this tab is visible both to project owners and funding program managers.



Click “Mark practice as completed”

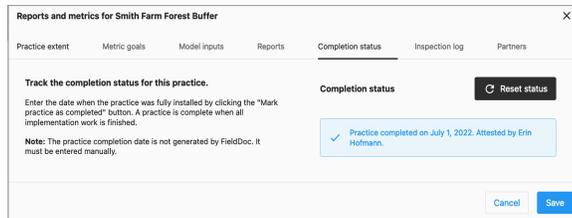
You only need to use this tab when you have completed installation of your practice.

Click the button “Mark practice as completed”.



Enter the date of completion

Date should align with the date of the completed installation, not the date of the reporting.



Status updates

The status will update in the reporting modal. The system will attribute the attestation to whichever user submitted and saved the report.

Learn about your program practices & metrics

To learn more about the practices and metrics within each program, you can search the program that you have assigned to your project. You can access the program summary page from your project summary page.

Practice Types

Metrics

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](#). Read detailed articles on all components of FieldDoc and watch videos walking through the project build process.

For all technical support questions, email support@fielddoc.org.