FIELDDOC
USER GUIDE

FieldDoc is a product of
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 award recipient 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 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!

NOTE: The Commons edits this Guide regularly to reflect the latest updates to FieldDoc. This version reflects system updates made through June, 2020.
FieldDoc System Structure

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

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

**SITE LEVEL** *(optional)*
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 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**
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**
  VEE has a curated metrics list. Add metrics the project level so they appear for 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**
  At this time, VEE has not selected 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.

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 subsections 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.

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

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.

Enter Project Summary Details

Name
Match to the grant award title

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.
Step 3. Project Level Summary Page

Before you proceed to adding your implementation information, let’s take a quick tour of your project summary page. Your summary page will update as you add practices and locations.

Select Project Target Metrics

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

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

Metrics
Add all target metrics from the practice types. The system will roll up the metric targets from the individual practices to display project level metrics.

Practices
Practices available for use are unique to each FieldDoc program. When fully added, FieldDoc will calculate the estimated reductions from that practice. Follow instructions in Step 6 to add all practices individually or in a batch upload.

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.

Right Side Panel
Use the right hand panel of icons to navigate to additional project-level inputs.
Step 4. Add sites to your project *(optional, go to step 6 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.

### 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.

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

### 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, .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 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.

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

TIP: Site polygons, once added, will appear blue on the project summary page and in the site tiles.

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.

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.
Step 6. Add Practice(s) to your project *(required)*

Practices refer to the on-the-ground restoration work you and partners will complete through the life cycle of the funded project. Reductions are calculated for each practice after completing all inputs.

**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, .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.

**TIP:** While we don't recommend it, you can dissolve a file with multiple polygons so that it will appear as one practice. This may result in errors in the calculations for reductions.
Step 7. Add Practice Details

Practices house your target metric progress and modeled calculation information. From your project summary page, click the plus sign under practices to add practices. Repeat these steps to add multiple practices to your project.

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. Each practice will have individual instructions for what inputs are required to calculate the estimated reductions. If you do not see your practice listed here, contact your program manager.

Sites
Select None if your practice is not associated with a site. Otherwise, select a site from the portfolio you created in Step 4.

Privacy
Select None if your practice is not associated

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IMPORTANT NOTE

For most practice types, FieldDoc calculates the estimated reductions to sediments and nutrients based on three inputs:

- the Practice Type,
- the Land-River Segment, and
- the practice extent, which is often the acreage.

Some practice types may require additional inputs beyond the basic three. Refer to the metrics page for practice-specific instructions and to add those additional fields, where required.
Step 8. Add Location polygon to your practice

Refer to the Practice Type description to confirm if the practice footprint or practice drainage area should be delineated. All practice footprints may be drawn as points, lines, or polygons.

**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 .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:** The final geometry can be edited or deleted. To edit, double click on the geometry, hover your mouse over the geometry and then click and drag points.

**Review your Polygon.**

Save your polygon. A red shape will appear on your map. The system recognizes this as the practice extent for your project.
Step 9. Add Practice Metrics

Now you get to add metrics and take the final steps to calculate FieldDoc-generated metrics. For practices where additional inputs are required, like stream restoration, you can find those fields by clicking on modify inputs under model inputs.

Select Project Target Metrics

Practice Extent
The system generated the practice footprint based on the geometry on the location page. If this is inaccurate, enter the custom area that will be used for calculating reductions here.

Modeled Inputs
For practices that require additional inputs to calculate reductions, you will click here to enter a separate page where you can enter the relevant values.

Add Metric
Search the system for manual metrics to add to this practice. All metrics will roll up to display in aggregate on the project summary page.

Assign Targets
Automatically, N, P, and TSS values will appear here. You cannot edit these values. Assign targets for manually added metrics. Targets indicate the value assumed at the completion of the proposed work.

Click the check mark to save your work in each section.

Repeat, Restore, Report

Repeat the steps to add additional practices to your project. When you are ready to report installation program you will enter into each practice summary page. Navigate to the bottom and add a new Installation Report.
Step 10. Add Implementation Report

Documenting progress towards project completion occurs through Reports. Reports are found at the bottom of each practice summary. 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.
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.