Tracking and Reporting on Actions
for Conservation of Species

The User Instructions guide contains essential information and guidance for the user to make full use of the Wildlife Tracking and Reporting Actions for the Conservation of Species (Wildlife TRACS). The instruction guide includes step-by-step procedures for system access and use.

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Introduction

Wildlife TRACS (Tracking and Reporting on Actions for the Conservation of Species) is a geospatial tracking, reporting and decision-support tool that will demonstrate the effectiveness of grants administered by the Wildlife and Sport Fish Restoration (WSFR) Program of the US Fish and Wildlife Service (FWS). TRACS will be used for all grants administered through WSFR and address the needs of policy makers, appropriators and the public to determine the relevant outcomes and performance of the WSFR Program, and provide decision support to the FWS and the States to facilitate strategic and effective investment of public funds in the conservation of species and other mandated uses.

Need

The need for Wildlife TRACS originated from the need to demonstrate to the Congress and to the Office of Management and Budget (OMB) the efficacy of State Wildlife Grants at addressing the needs of Species of Greatest Conservation Need (SGCN). In 2009, the US Fish and Wildlife Service formed a pilot group with representatives from sixteen state fish and wildlife agencies and partner NGOs to develop a new system to track accomplishments of the SWG Program and to indicate the effectiveness of federal expenditures in reversing declines in SGCNs and preventing those species from being listed under the federal Endangered Species Act.

Reporting on accomplishments with WSFR administered funds has traditionally focused on units of outputs such as acres of habitat or miles of stream improved. Although this information is important for conservation practitioners to track progress and efficiencies of projects, how these outputs contribute to desired conservation outcomes have not necessarily been quantified or tracked – or, for that matter, clearly explained. For example, when SWG funds have been used to restore native grasslands, conservationists have inferred from the number of acres restored the benefits to grassland birds. Inference, however, is neither a measurement of improvement for grassland birds nor, more importantly, a quantification of how restored acres of native grassland may have contributed to sustainable populations of grassland birds.

The tracking of outputs has also been traditional for projects funded by Pittman-Robertson (PR) Wildlife Restoration Act and Dingell-Johnson (DJ) Sport Fish Restoration Act grants. Indeed, measures just of output served the conservation community well for decades. Today, things are changing. The recreational shooting, archery, fishing, and boating industries that fund PR and DJ want to know more than just outputs; they also want to know if the outputs are increasing hunter and angler recruitment and retention and if the excise taxes they pay are benefitting their financial bottom lines.

Wildlife TRACS will provide the WSFR program an opportunity to expand tracking and reporting for all WSFR administered grant programs beyond historic output-based accomplishment reports to reports that include performance and outcomes of WSFR-funded fish and wildlife conservation programs.

Glossary

Access Priviledges	Precise statements that define the extent, to which an individual can access computer systems; use the programs and data on a system, and under what circumstances this access will be allowed.
Account	A combination of username and password or other authentication combination which allows access to a system.
Account Management	Involves (1) the process of requesting, access, group and role assignment and deactivating user accounts; (2) tracking users and their respective Access authorizations; and (3) managing these functions.
Action	An action is an intervention undertaken by a project team to reduce threats, capitalize on opportunities, or restore natural species and ecosystems (equivalent to a "strategy" in the CMP Open Standards). An action is user defined and can be represented spatially by polygon(s) on the TRACS mapper. Projects contain one or more actions; and, actions are used as the reporting mechanism for grants.
Activity	A specific descriptor of an action used for very specific reporting needs. This level of detail is optional with some exceptions. For those programs for which this level of detail is required, outputs are also required. Estimated costs are optional at this level.
Approach	A plan to solve a situation or problem that leads to a desired outcome.
Basemap	A map depicting background reference information such as landforms, roads, landmarks, and political boundaries, onto which other thematic information is placed. A basemap is used for locational reference and often includes a geodetic control network as part of its structure.
Bookmarks	A TRACS map tool that enables a user to quickly access frequently used geographic locations.
Bundles	A collection of projects rolled up together in a package for submittal (e.g. projects are grouped into an application bundle before being submitted to WSFR for approval).
Category	A category is a generic descriptor that determines the type of action. This is a pick list in TRACS. Estimated costs are required at this level. Category is used as a basis for aggregating like actions for reporting purposes.
Converted Data	Data from legacy systems or remote databases that has been translated into a structure that is compatible with TRACS.

Data Ingestion	The process of consuming data from remote systems in a format that is compatible with TRACS.
Effectiveness Measure	A metric of accomplishment that describes how successfully the objectives of a project are met through the implementation of specific actions (quantitatively or qualitatively). An accomplishment and outcome assessment that quantifies the extent to which a project process produces intended results. The effective measurement process quantifies how well the project provides timely, accurate, and useful information to decision makers.
Expected Results	Describes specifically the expected effects of the completed effort on people or resources.
Indicator	A method of measuring the desired future state of an objective. In particular, TRACS uses indicators to assess whether a given conservation action is leading to a desired objective and ultimate impact. Indicators may be standard (i.e. measurable by action outputs) or custom (i.e. measurable only by the end user via periodic progress reports).
Feature Editor	A TRACS tool allowing the user to create and edit plan, project, and action shapes.
Feature Explorer	A TRACS tool allowing users to view, create, and edit plan, project and action attributes such as properties, cost, objectives, and attachments.
Feature Search	Allows users to search for a plan, project, or action.
Federal Funding Source	Award information from FBMS can only be associated with a project statement by the WFRS grant specialist
Geospatial Data	Information that identifies the specific location and characteristics of natural or constructed features as well as boundaries on the earth.
Grant	An award of financial assistance made by the Federal Government to an eligible grantee allowing fulfillment of one or more approved projects.
Grantee	A person or group to whom a grant is made. Recipients of grant proposals receive funds.
Group Layers	A group is a collection of users assigned to a specific entity. By default, Data TRACS has top-level groups that correspond to state and federal Agencies. A top-level group can have one or more sub-groups that correspond to state fish and wildlife agencies or regional offices. A sub-group can have one or more-sub groups of its own that correspond to regional boundaries, departments, jurisdictions, or areas of responsibility. The workload associated with user management necessarily increase as

more-sub-groups are defined.

Data TRACS users participate in one or more groups and are assigned one or more roles that pertain to one or more entities. For example:

User: John Doe
Group: Washington Department of Fish and Game
Role: State Editor
Entity: Project

Additional spatial datasets that are superimposed onto a base map.

Map	A graphical representation of the spatial relationships of entities within an area.
Map Legend	Allows users to view symbology information for all visible features on a map (e.g. figures, shapes, lines and places).
Multipurpose Project	A grant-funded project that carries out the purpose of a single grant program and also carries out either the purpose of another grant program, or an activity unrelated to a grant.
Need Statement	A statement that describes a specific problem and cites research or data to support the description.
Objective	The specific and measurable desired future state of the purpose or target (e.g. "decrease the number of hunting accidents" or "increase the population of species x by 30%). Objectives consist of specific statements of what exactly will be accomplished by a plan, project, or action. Objectives may be expressed as a quantity, a deadline, and/or the required quality of accomplishment.
Output Measure	A metric of accomplishment quantifying the amount of work, activity, or production completed by a group of practitioners during a given time frame.
Plan	A defined and accepted strategy for achieving specific goals within a defined geographic region. Plans are optional in TRACS, but they are helpful to show linkages between work and strategic planning efforts.
Polygon	A flat shape consisting of straight lines that are joined to define the borders of a project.
Project	A user defined boundary in which a set of actions and/or activities are performed by a team of practitioners to achieve specific goals and objectives.

| Project Narrative | A description that highlights the project's benefits, purpose, species, and implementation techniques and, is used internally and externally. |

Project Narrative — A description that highlights the project's benefits, purpose, species, and implementation techniques and, is used internally and externally.

Project Description — A narrative that highlights the project's purpose, benefits, impacts, and implementation techniques and, is available internally and externally.

Purpose/Target — The intended outcome of a project in general terms.

Role — A role is the permissions that are associated with a particular user function or operation.

Symbols

✳	Indicates the field is required
❓	Description of the field
👁	Information is display in public reports

Strategy — A specific descriptor that can be used to generate more specific aggregations for reporting purposes. This is a pick list in TRACS. Estimated costs are options at this level; output measures are required.

Threat — A negative force or pressure acting upon a specific resource and requiring a specific response.

TRACS User — Includes user profiles, groups, permissions, etc.

Need — The lack of something that is wanted or deemed necessary as it relates to a specific resource.

Vertice — Polygon points that segment polygon lines; multiple points are called *vertices* or corners. Vertices can be used as handles to move and adjust a polygon's lines.

Wildlife TRACS — Tracking and Reporting Actions for Conservation of Species (TRACS). TRACS is an online data management tool to facilitate WSFR tracking and reporting accomplishments related to federal assistance grants. It is comprised of two parts: Data TRACS and State TRACS.

Workflow — A set of tasks carried out in a certain order to achieve a goal.

Keys

Point of Contacts

System Manager

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Chapter 1 – User Management

Guidelines

Account Establishment and Duration. Each Account shall be for the individual use of an identified user. Accounts remain valid for the duration the individual maintains the relevant status with the U.S. Fish and Wildlife Service or state agency or until the account is deactivated.

Each user must have a unique identifier and to be successfully authenticated to gain access.

Records of processed and denied requests for the creation and/or modification of user accounts will be kept for auditing purposes. Records will be retained for one year.

The creation of a user account must be initiated through an on-line request form and be authorized by pertinent levels of management.

If a user is servicing multiple offices, a separate Wildlife TRACS User Access Request must be authorized by their supervisor and submitted for each individual office.

To retain an "Active" status on your Wildlife TRACS account simply log into the Wildlife TRACS application system every 60 days. Infrequent users are responsible for keeping their user account with an "Active" status.

Access Procedures FrequentlyAsked Questions

Who should use Data TRACS?

Persons responsible for inputting or managing WSFR grant program projects and performance data, especially state wildlife agency coordinators, program specialists, project leaders, and WSFR grant specialists.

Who should approve new user requests?

New user requests are approved by the User Administrator for the office or agency to which the user belongs. The User Administrator is informed of new user requests via email and is responsible for approving or denying access within a reasonable time frame. User Adminstrators are responsible for verifying the accuracy and validity of new user requests prior to approval.

The TRACS Help Desk via tracs-helpdesk@fws.gov can assist offices with the initial registration of User Administrators.

What happens when an employee no longer requires access?

TRACS User are responsible for deactivating end-user accounts when access is no longer needed. End-user passwords expire every 60 days as a security measure. Regional office and state agencies should review all system accounts and privileges on an annual basis.

What is a role?

A role is the permission associated with a particular user function or operation. Data TRACS defines the following roles:

Account Holder: The individual which is assigned an account.

User Administrator: Individual who is responsible for administering user access requests, group and role assignments, and account deactivation.

State Editor: Responsible for entry of specific data elements (e.g. plans, projects, actions).

State Review: Responsible for review of system outputs and reports.

State Approver: Responsible for approval of system outputs and reports.

Federal Reviewer: Responsible for review of system outputs and reports.

Federal Approver: Responsible for approval of system outputs and reports.

What is a group?

A group is a collection of users assigned to a specific entity. By default, Data TRACS has top-level groups that correspond to state and federal agencies. A top-level group can have one or more sub-groups that correspond to state agencies or regional offices. A sub-group can have one or more sub-groups of its own that correspond to regional boundaries, departments, jurisdictions, or areas of responsibility. The workload associated with user management necessarily increases as more sub-groups are defined within a parent group.

How are permissions handled in Data TRACS?

Permissions in Data TRACS are group based. State and Federal agencies are assigned a top-level group (e.g., Group = Montana; Group = Department of the Interior). Within each top-level group, sub-groups are created to correspond to state fish and wildlife agencies, Federal bureaus,and regional offices. Sub-groups can have additional sub-groups to accommodate various office, departmental, or jurisdictional organization schemes.

End-users belong to one or more groups and have specific permissions (i.e. the operations or functions the user can perform). Permissions are inherited in a top-down hierarchy. For example,a user with permission to edit project data in the Department of Interior (DOI) group automatically has permission to edit project data in the U.S. Fish & Wildlife Service (USFWS) group. However, a user who is in the USFWS group *does not* have implicit permission to edit data in the DOI group. It is important to keep track of which end-users belong to a specific group in order to ensure that unintended access is not available through group inheritance. Data TRACS will include user management tools that display group participation and end-user permissions.

Federal end-users of Data TRACS are managed by the appropriate regional WSFR office. Management of state, tribal, and territorial users is the responsibility of the appropriate State agency. State agencies will identify one or more User Administrators during the registration process who are responsible for approving, managing, and deactivating end-user accounts at the appropriate level.
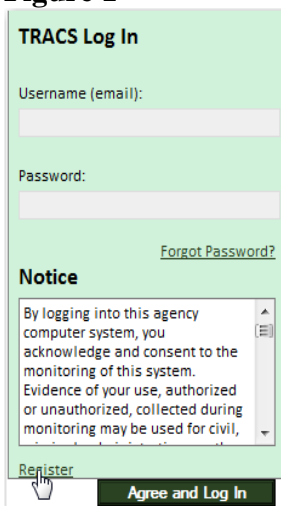
Requesting Access to Wildlife TRACS

New users request access to the Data TRACS application at **https://tracs.fws.gov** site using the Register link.

Step 1
- Click on the <u>Register</u> link located on the bottom far left side located under the **Notice**

Figure 1

(Figure 1)

Step 2
- Complete the Profile Information using <u>only</u> your official contact information

Figure 2

(Figure 2)

Step 3

- Select the appropriate Agency Type from the drop down list. i.e., Federal, Tribal, State

Note: The Agency drop down list values are determined by the Agency Type selected by the requesting user.

Figure 3

(Figure 3 Federal)

Data TRACS will use your e-mail address as your username; therefore, if your e-mail changes you should register for a new access account and your old account will be disabled.

Step 4

- Type in your full official e-mail address and confirm
- Create and enter password and confirm

Hint: Your password should be a minimum of 12 characters with a combination of lower, upper case and contain one non alphanumeric character such as #@. Numeric numbers are optional. Passwords should change by at least two characters. Passwords cannot be re-used within 365 calendar days.
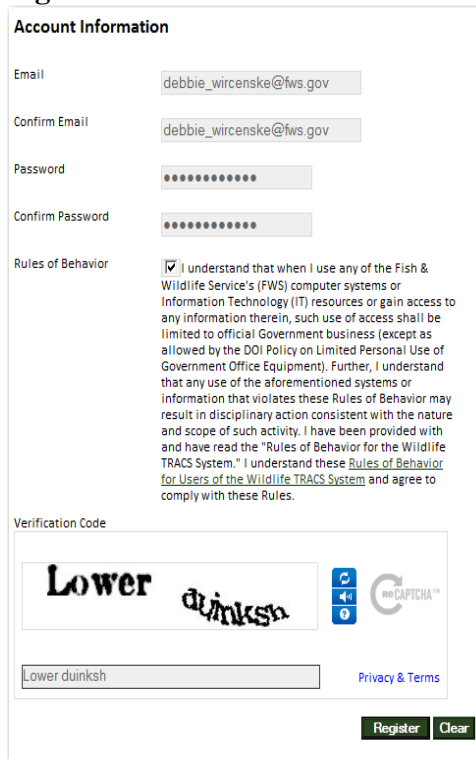
Note: Change your password if you believe it has been compromised and report the incident to the Wildlife TRACS Help Desk at tracs-helpdesk@fws.gov. If a user account name and password are keyed in five (5) consecutive times without correctly accessing the system, the account will be automatically locked for 15 minutes.

- Click on the "Rules of Behavior for Users of the Wildlife TRACS System" link. Close out of your browser by selecting the located in the upper right hand corner of your desktop.
- Select the Rules of Behavior box indicating that you have read and agree to comply with the rules of behavior.
- Type the Verification Code as shown on your screen.

Hint: If you unable to read the verification code select the button located on the right side of the Verification Code to generate a new code.

- Click the Register button

Figure 4

(Figure 4)

Note: User Administrators will receive a system generated e-mail "New TRACS Registeration Request Waiting for Your Approval" when the requesting user has successfully completed the registration process.

Note: Requesting users will receive a system generated e-mail "TRACS Registration Request Approved" when the User Administrator has successfully approved the TRACS registration.

Wildlife TRAC users can log into Wildlife TRACS via url address **https://tracs.fws.gov**

Step 5

- Type in your username which is your official e-mail address and the password that you created.
- Select the Agree and Log In button

Figure 5
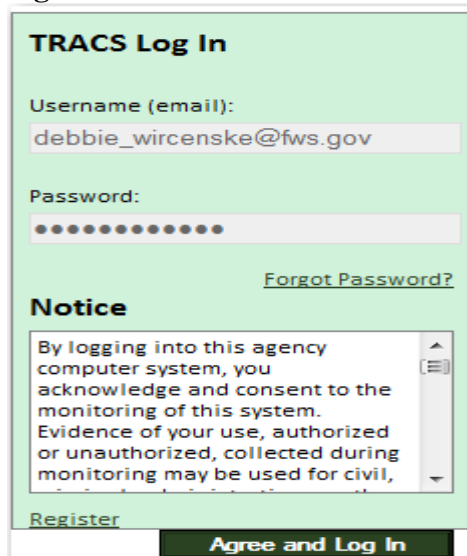
(Figure 5)

Congratulations you have successfully logged into Wildlife TRACS!

Forgot Password
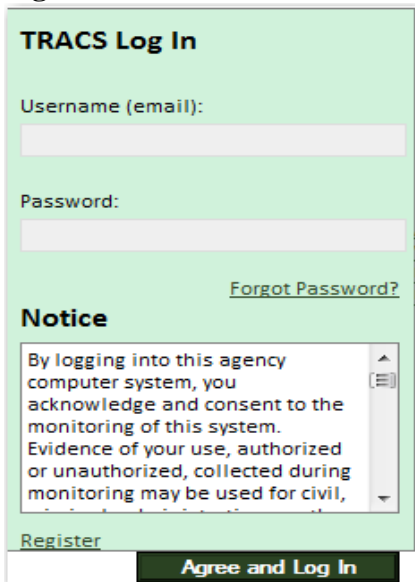
Users can select the "Forgot Password" link to reset their password.

Note: If your account has been deactivated by the User Administrator, you will need to complete the registration process again.

Step 1
- Select the Forgot Password? link located on the left side under the Password field in the Wildlife TRACS Log in Screen

Figure 1

TRACS Log In

Username (email):

Password:

Forgot Password?

Notice

By logging into this agency computer system, you acknowledge and consent to the monitoring of this system. Evidence of your use, authorized or unauthorized, collected during monitoring may be used for civil,

Register

Agree and Log In
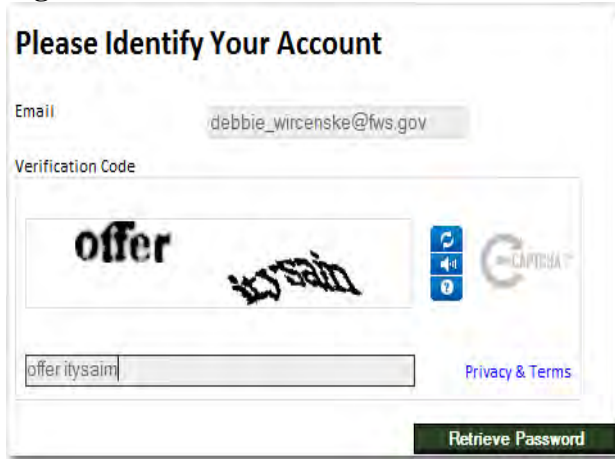
(Figure 1)

Step 2
- Enter your official e-mail address ONLY (e.g. user@stateagency.gov).
- Enter the Verification Code.
- Click the Retrieve Password button. Retrieve Password

Note: Passwords can **only** be changed one (1) time during a 24 hour period.

Figure 2

Please Identify Your Account

Email   debbie_wircenske@fws.gov

Verification Code

offer itysaim   Privacy & Terms

Retrieve Password

(Figure 2)

You will receive a system generated e-mail via tracs-helpdesk@fws.gov.

Step 3
- Select the link contained within the e-mail.

Note: The link in the e-mail will re-direct you to the Reset TRACS Password Screen.

Figure 3

tracs-helpdesk@fws.gov   3:21 PM (2 minutes ago)
to me

Hello Debbie Wircenske,

A password reset request for the TRACS application has been submitted on your behalf. If this request did not originate with you, it may indicate that an unauthorized person is trying to access your account.

If you did not make this request, please contact the TRACS Help Desk immediately at tracs-helpdesk@fws.gov.

If you did make this request, you can finish changing your password by clicking on the following link:

https://tracs.fws.gov/training/data_tracs/dt/account/password/start?code=13410150910218939056044844545876708021844339294419456098847076793074042179393510573420284220351576825030763361752402537456887209729142807075794830667816855986401900735233348200096179887126862945911183700962068265283872863211998972231381097178877479372808 67

This link will only be valid for 1 hour after the password change request was made. It will expire at: Tue Jun 18 16:21:33 MDT 2013

(Figure 3)

Step 4
- Enter your official e-mail address and confirm.
- Create and enter your password and confirm.
- Type the Verification Code.
- Select the Change Password button.

Figure 4

(Figure 4)

Note: A system generated notification that the password has been successfully changed will be sent to the user email address.

Step 5
- Select the login to TRACS link

Figure 5
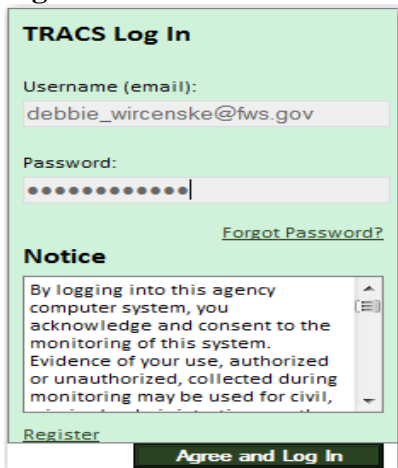
(Figure 5)

You will be re-directed to the TRAC Log In Screen.

Step 6
- Type in your username which is your e-mail address and your new password.
- Select the Agree and Log In button.

Figure 6

TRACS Log In

Username (email):

debbie_wircenske@fws.gov

Password:

••••••••••••

Forgot Password?

Notice

By logging into this agency computer system, you acknowledge and consent to the monitoring of this system. Evidence of your use, authorized or unauthorized, collected during monitoring may be used for civil,

Register

Agree and Log In

(Figure 6)

Change Password

Users can reset their passwords using the Data TRACS Dashboad tool known as Profile. A current password is required and the user account must be active.

Step 1
- Select "Profile" located to the right of your username.

(Figure 1)
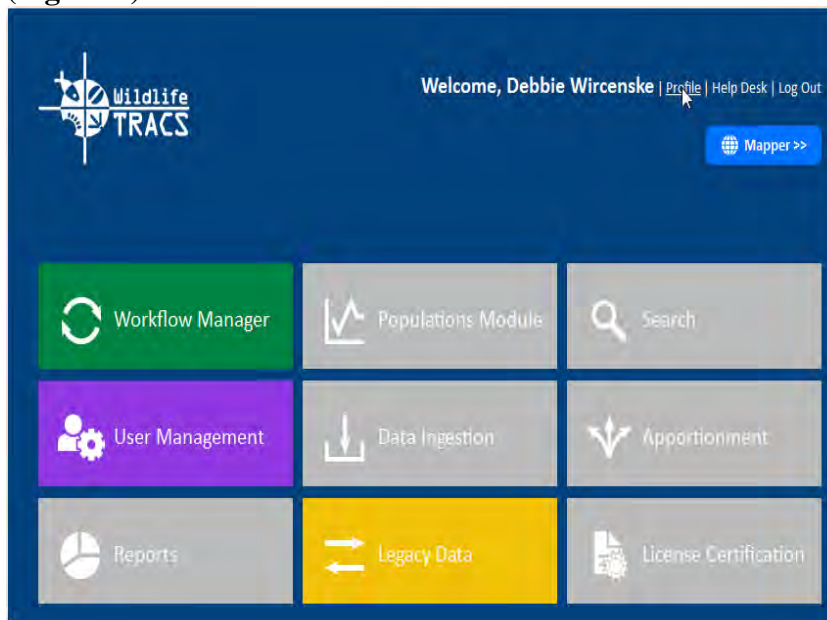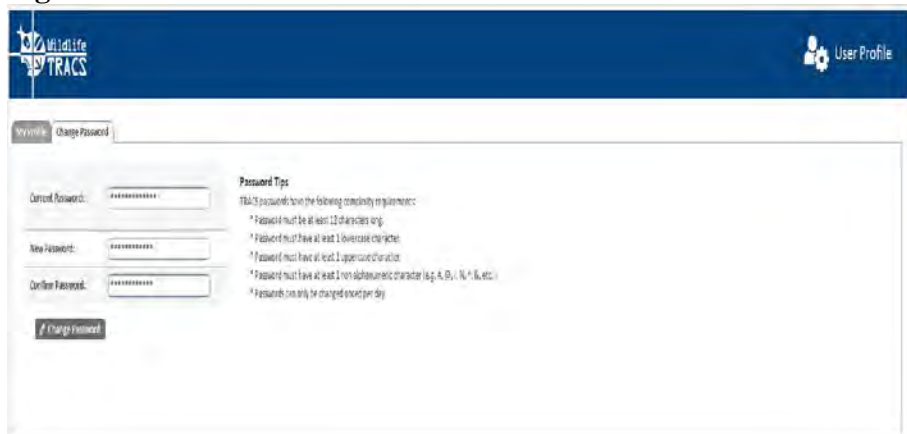
(Figure 1)

Step 2

- Select the Change Password tab.
- Enter your current password, new password and confirm your password.
- Select the Change Password button.

Figure 2

(Figure 2)

Approving User Request (User Administrator Only)

If you are a User Administrator, a system generated e-mail notification "New TRACS Registration Request Waiting for Your Approval" will be received when a user successfully completes the registration process.

TRACS User Manager: New TRACS Registration Request Waiting for Your Approval

tracs-helpdesk@fws.gov
to me, jeremy_bradley, dan_hogan, brian_j_davis

Hello TRACs User Manager,

There is a new TRACS registration request awaiting your approval.

- Requesting User: Jacqueline Trout
- Agency Requested: U.S. Fish and Wildlife Service
- Role Requested: Federal Reviewer
- Requested On: Fri Jun 14 13:21:27 MDT 2013

If you have questions about this request, please contact the TRACS Help Desk at tracs-helpdesk@fws.gov.

Step 1
- Log into Wildlife TRACS via url address **https://tracs.fws.gov**
- Enter your username and password.
- Click the Agree and Log In button.

Figure 1

(Figure 1)

User Administrators will directed to the Wildlife TRACS dashboard.

Step 2

- Place your cursor over the User Management module and left click.

Note: The User Management button will expand to display a nested submenu to the right of the User Management module.

- Select Manage Access Requests.

Note: A list of Requesting Users is displayed for users who have been identified as an Administrator for their respective agency.

Figure 2
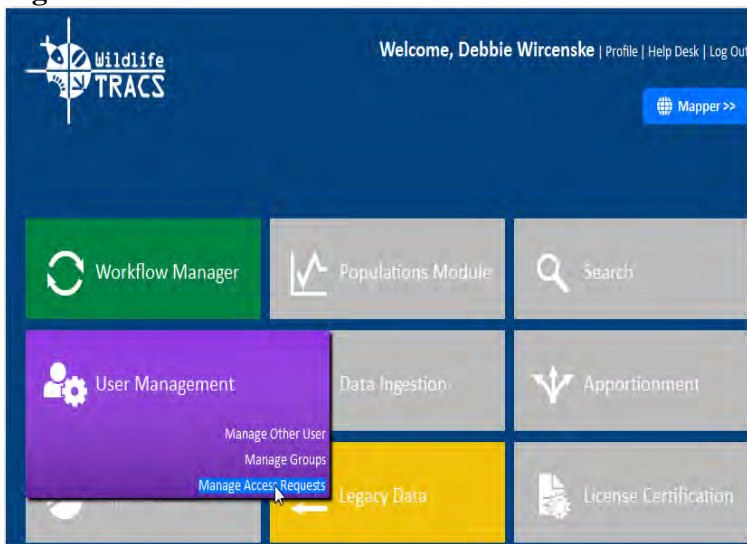
(Figure 2)

Step 3

- Select the Manage button located on the right side under the Controls column and left click.

Figure 3

(Figure 3)

The Manage Access Request form contains the user profile information and the type of access requested by the user.

Step 4

- Select the Start Approval button located on the bottom left hand side of the form.

Figure 4
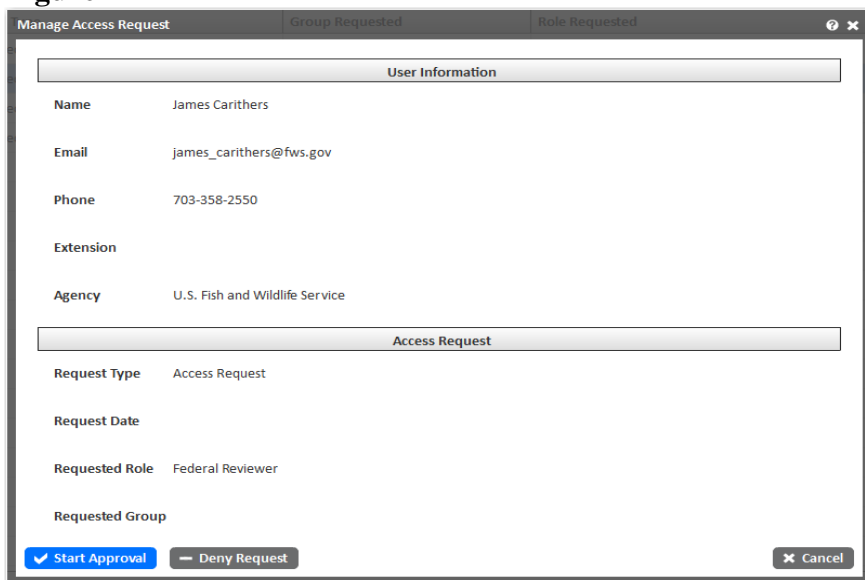
 (Figure 4)
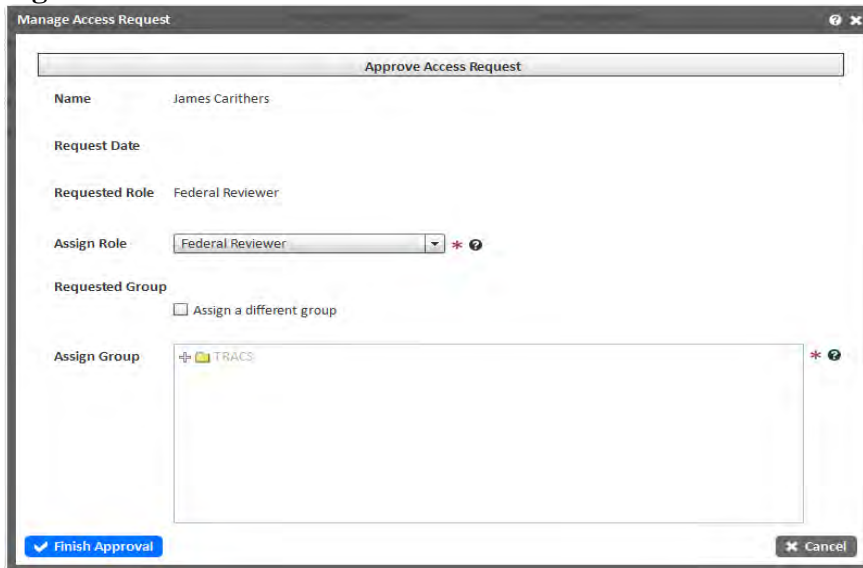
User Administrators will be redirected to the Approve Access Request form.

Step 5

- Verify the user information, role, and group and select the Finish Approval button

Note: Should you need to add/edit the group and role assignments refer to Role and Group Assignment.

Figure 5

(Figure 5)

Step 6

- Select the OK button

Figure 6

(Figure 6)

Congratulations you have successfully approved a requesting user!

The requesting user will receive a system notification entitled "TRACS Registeration Request Approved".

TRACS User Manager: TRACS Registration Request Approved   Inbox x

tracs-helpdesk@fws.gov
to me, jeremy_bradley, dan_hogan, brian_j_davis

Hello TRACS User Manager,

The following TRACS registration request has been approved:

- Requesting user: Jacqueline Trout
- Role Approved: Federal Reviewer
- Group Approved: Wildlife and Sport Fish Restoration
- Agency Approved: U.S. Fish and Wildlife Service
- Approved By: Daniel Hogan
- Approved On: Mon Jun 17 13:40:13 MDT 2013

If you have questions about this denied request, please contact the TRACS Help Desk at tracs-helpdesk@fws.gov.

Role and Group Assignment

The Approve Access Request form allows the User Administrator to assign or change role(s) and groups for the requesting user.

The "Requested Role" is the default role assigned to the requesting user. The default role is identified from the Agency Type selected by the requesting user when registering for access to Data TRACS. The default role for users associated with a Federal agency is Federal Reviewer. The default role for users associated with a State or Tribal agency is State Editor.

> ➢ The Editor role enables a requesting user to create and edit plans, projects, and actions within their group assigment and initiate workflow actions.

> ➢ The Reviewer role enables a requesting user to create and edit plans, projects and actions within their group assignment and complete reviewer functions in the workflow.

> ➢ The Federal and State Approval role enables a requesting user to create and edit plans, projects and actions within their group assignment and complete approval functions in the workflow.

A group is a collection of users assigned to a specific group or subgroup. By default, Data TRACS has top-level groups that correspond to state and federal agencies. A top-level group can have one or more sub-groups that correspond to state fish and wildlife agencies or regional offices. A sub-group can have one or more sub-groups of its own that correspond to regional boundaries, departments, jurisdictions, or areas of responsibility.

Federal: In this example, a user is assigned to a Federal Agency, U.S. Fish and Wildlife Service, Headquarters (subgroup of U.S. Fish and Wildlife Service), Division of Ecological Services (subgroup of Headquarters). The Federal Reviewer role is assigned by default.

State: In this example, John Doe is assigned to a State Agency, Mississippi, Mississippi Department of Wildlife Fisheries (subgroup of Mississippi), and Parks (subgroup of State of Mississippi). The State Editor role is assigned by default.

Creating a New Group

Step 1
- Select the Manage Group submenu from the User Management module.
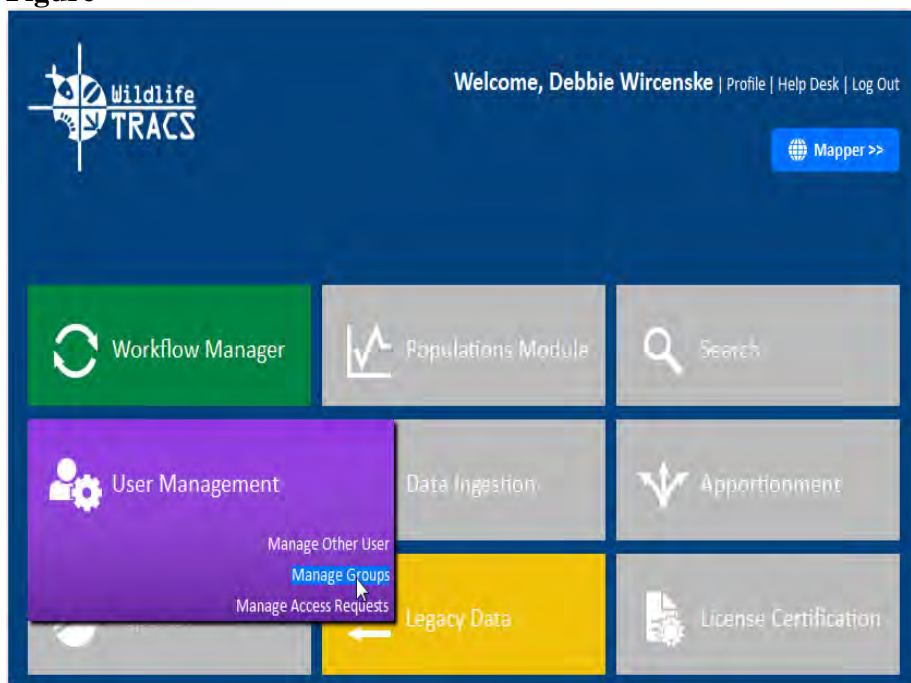
Figure

(Figure 1)

Step 2

- Select the Create New Group button ![+ Create New Group]
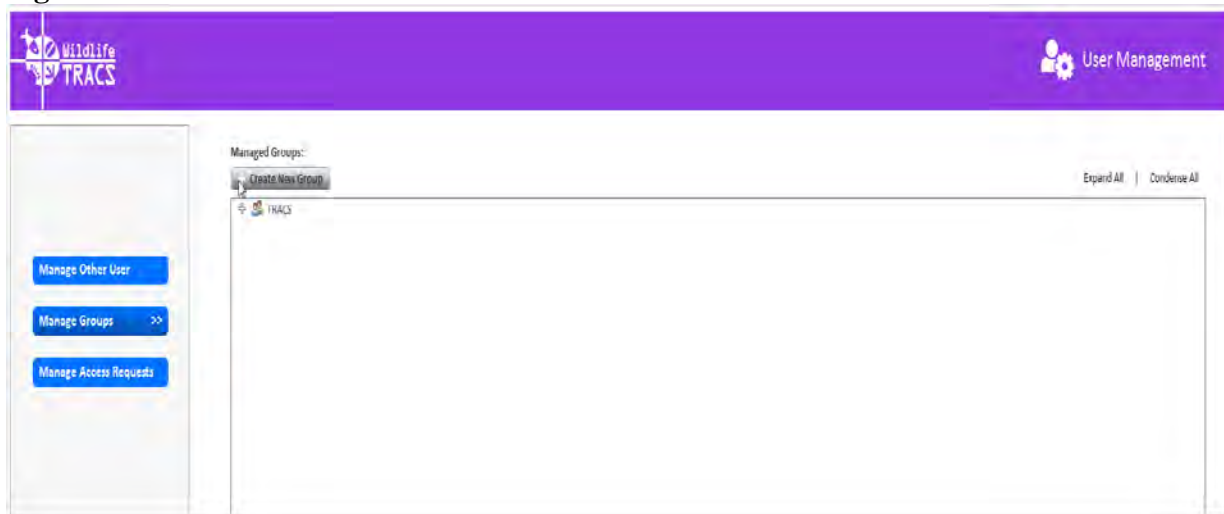
Figure 2

(Figure 2)

The Create A New Group window will open.

Step 3

Select the ![dropdown] for a drop down list to select i.e., Headquarters (U.S. Fish and Wildlife Service)
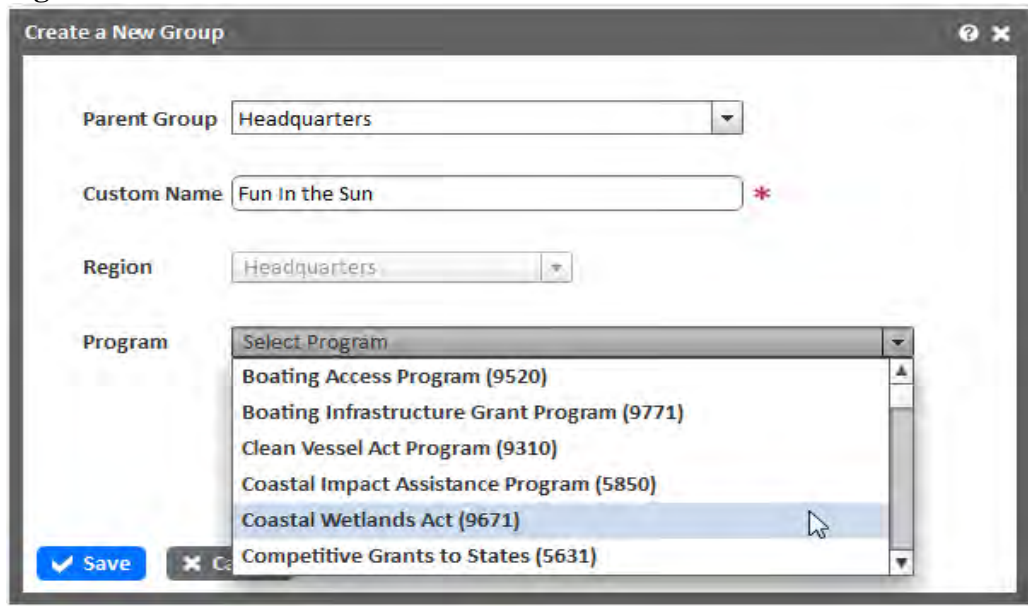
- Type in a Custom Name (e.g. Fun in the Sun).
- Select the Grant Program.
- Click the ![✔ Save] button.

Figure 3

(Figure 3)

Viewing the New Group

Step 1
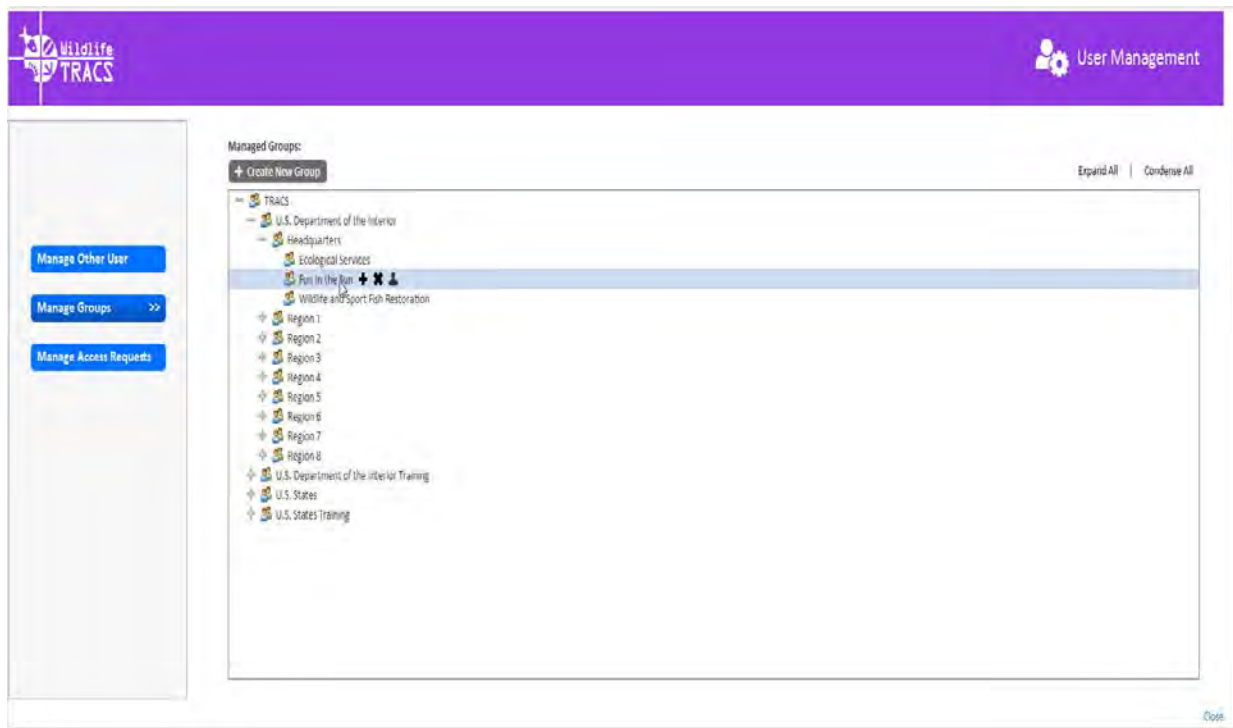
- Expand TRACS by selecting the plus sign.

Figure 1
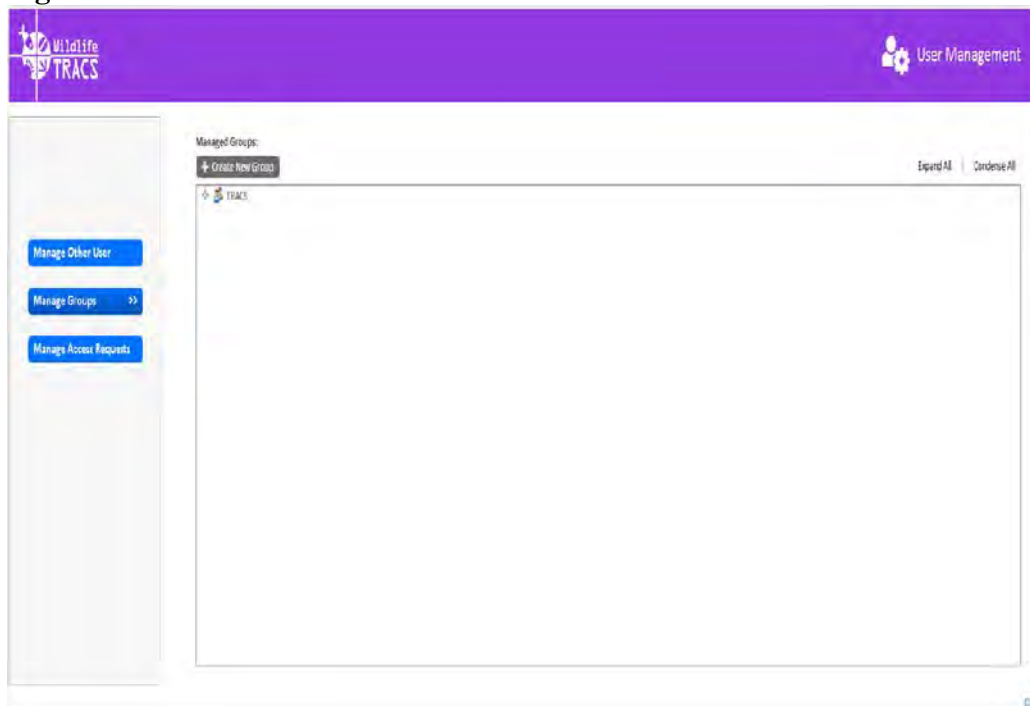
(Figure 1)

A new group "Fun In the Sun" has been successfully created under U.S. Department of Interior, Headquarters.

Create New Subgroup for an Existing Group

Step 1

- Select the Create New Group button.
- Select the parent group in which the subgroup will reside.
- Complete the required fields and click Save.

Note: A new subgroup can also be created by highlighting a parent group node and clicking the plus sign.

Figure 1
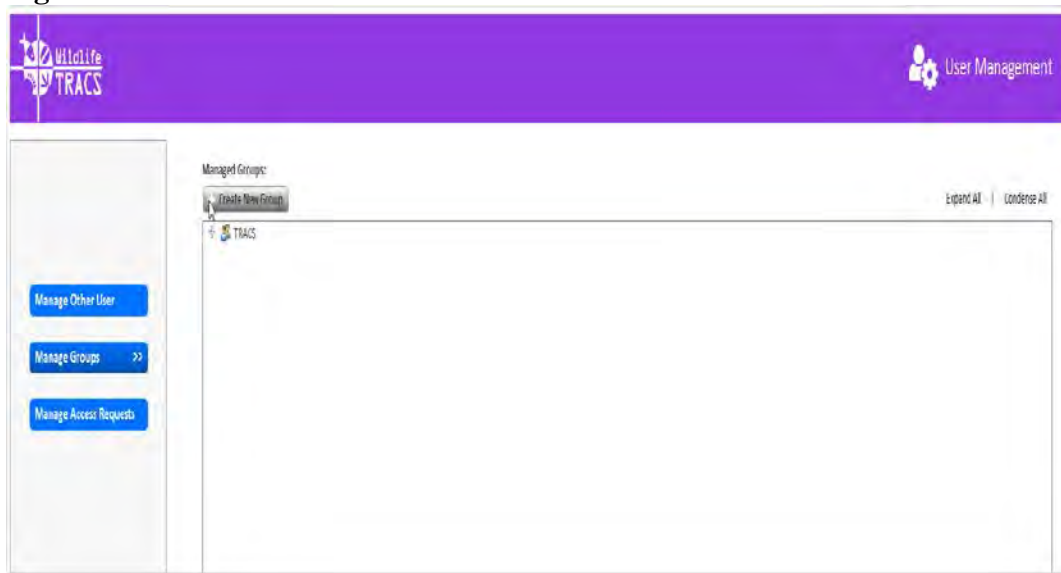
(Figure 1)

Step 2

- Expand TRACS-> U.S. Department of The Interior->Headquarters by clicking the plus signs.
- Click the plus sign located to the right of Ecological Services.

Figure 2
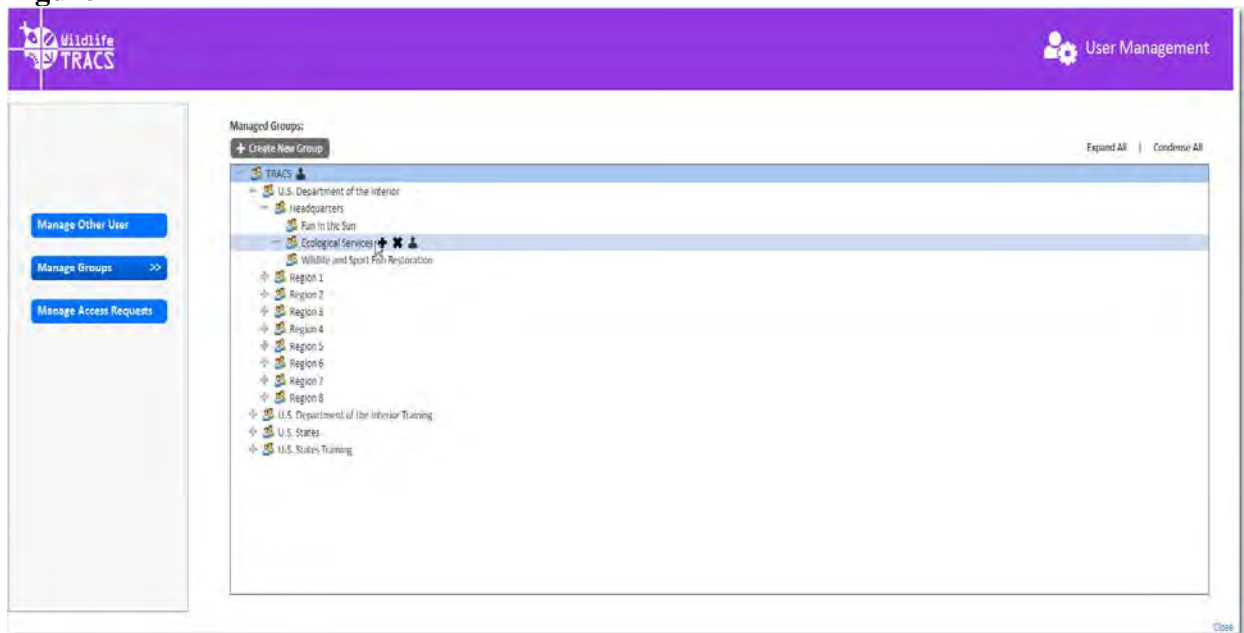
(Figure 2)

Step 3

- Select the parent group in which the subgroup will reside.
- Enter the name of the new subgroup (e.g. Turtle) and click Save.

Figure 3
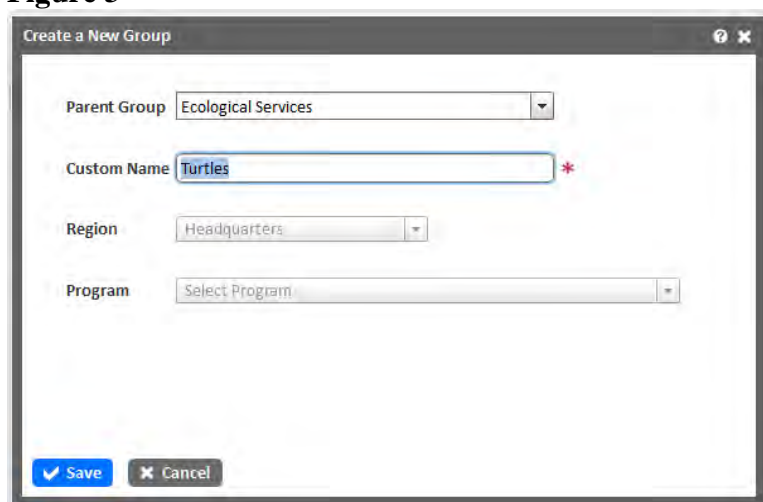
(Figure 3)

A new subgroup layer "Turtle" has been created under -> U.S. Department of The Interior->Headquarters->Ecological Services
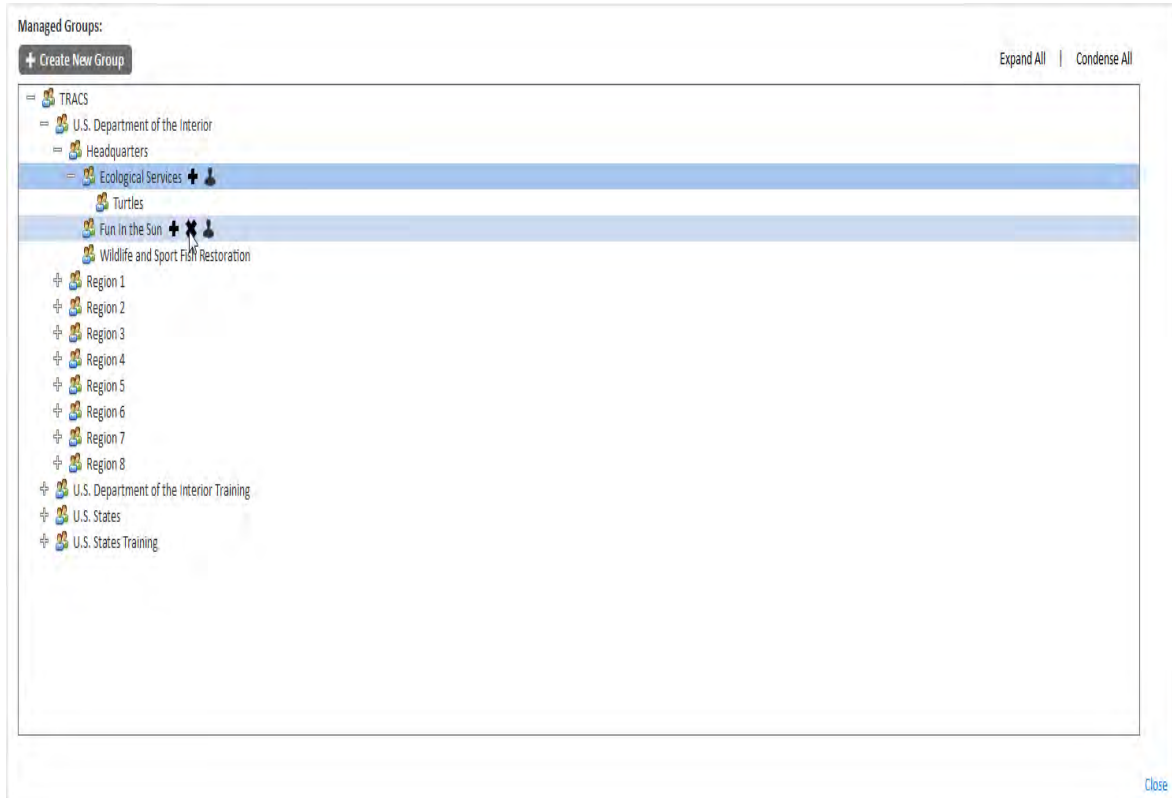
Review and Verification of New User Setup

Step 1

- Select the Manage Other User submenu from the User Management module
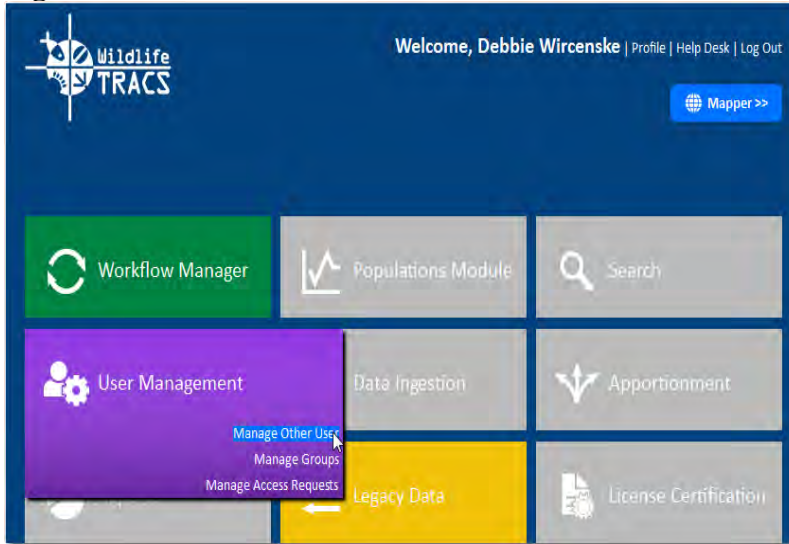
Figure 1

(Figure 1)

Step 2

- Type in the first three letters of the user's first or last name

Note: The Manage Other User tool cannot be used to manage your account. Use the Profile tool instead to manage the details of your account.

Figure 2
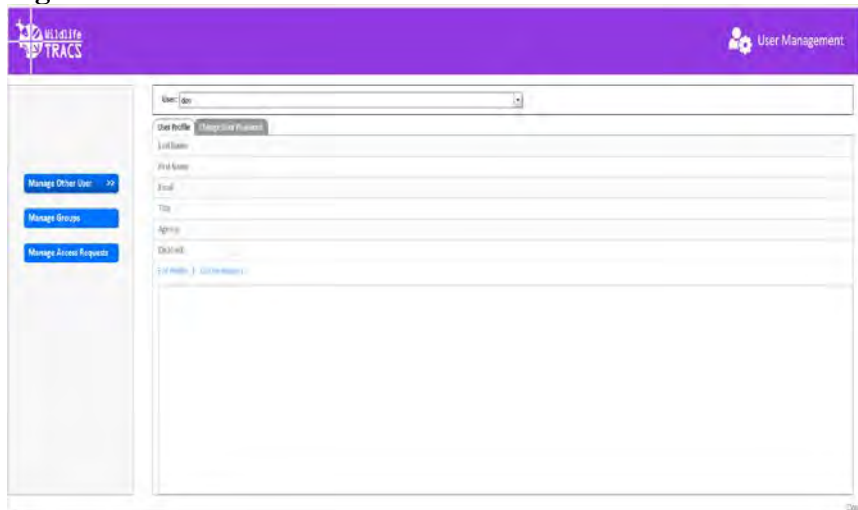
(Figure 2)

Step 3

- Select the user from the drop down list

Figure 3
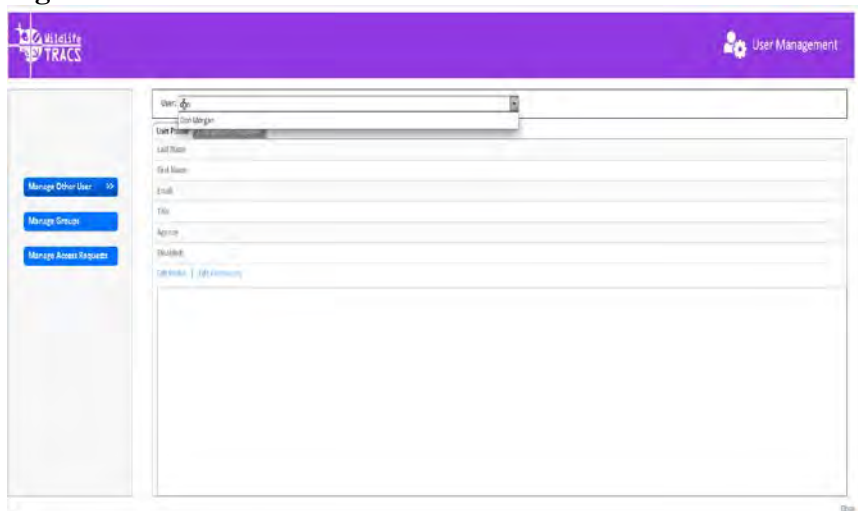
(Figure 3)

Step 4

- Expand the TRACS group tree to view the groups in which the user participates.

Figure 4
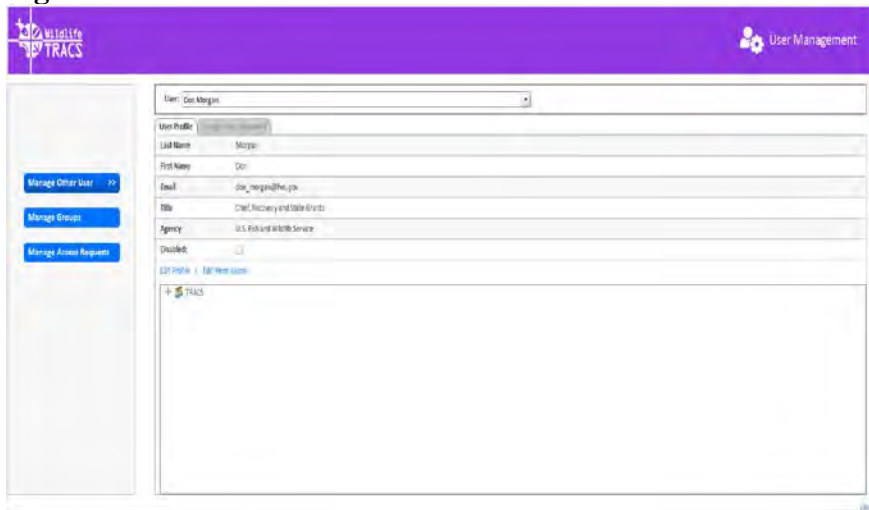
(Figure 4)

Figure 5
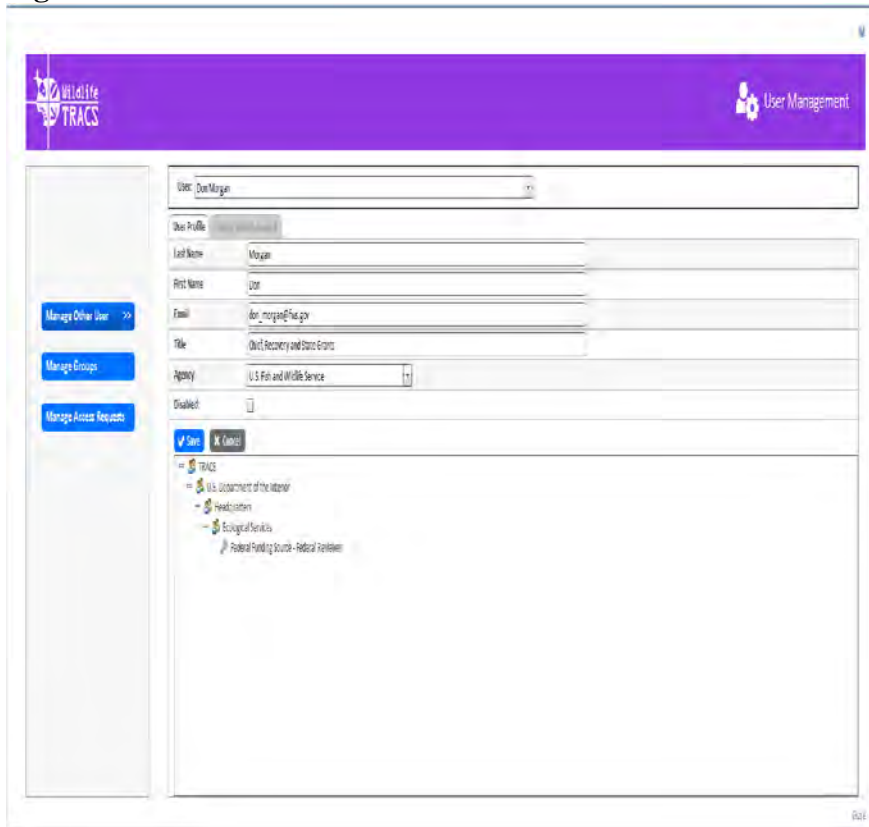
(Figure 5)

Deleting a Group

A group can be deleted by a User Administrator; however, a group cannot be deleted if user(s) are assigned to the group.

Step 1
- Select Manage Other Users.
- Click the plus sign to open all applicable groups and subgroups
- Select the located to the right of the group and or subgroup.

Figure 1
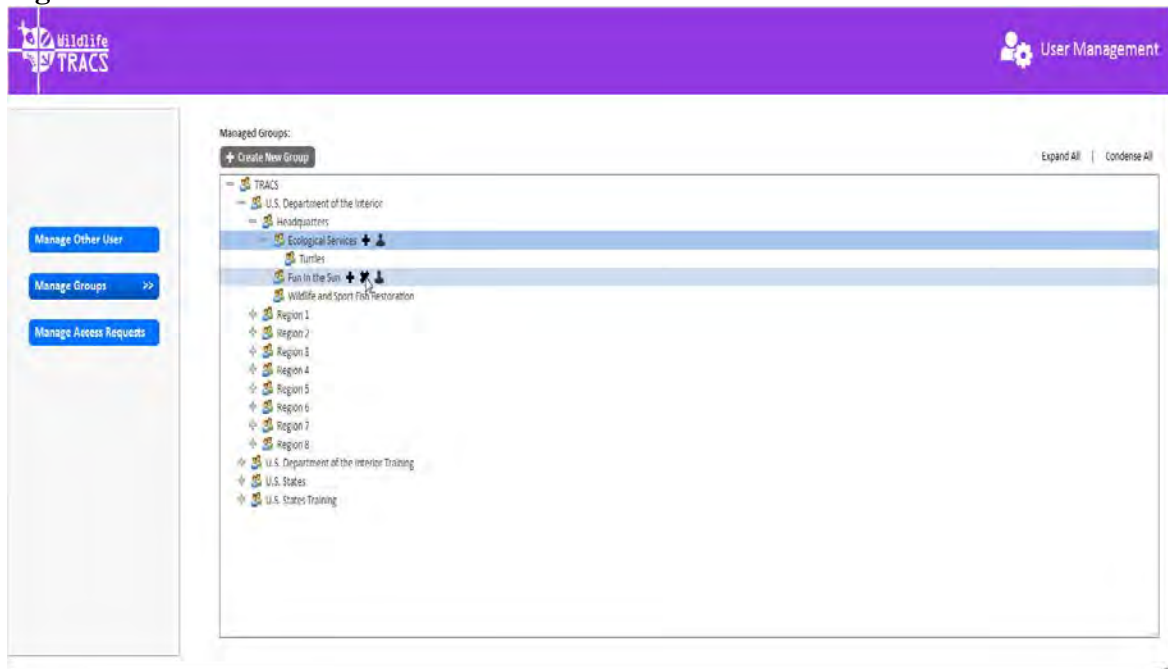
(Figure 1)

The Delete Group warning message will appear. Click the button.

Figure 2
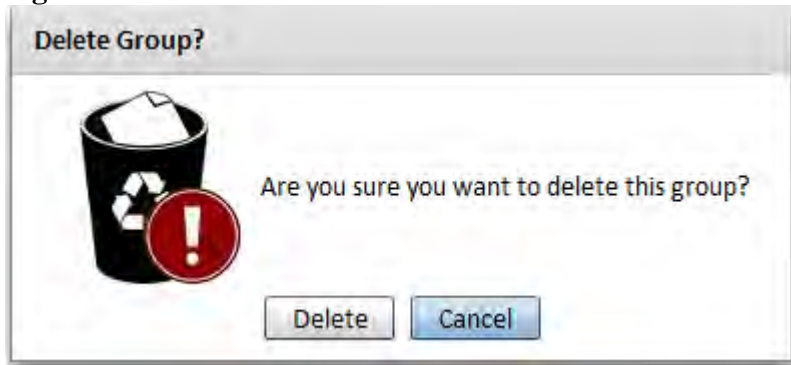
(Figure 2)

Subgroup "Fun In the Sun" has been successfully deleted.
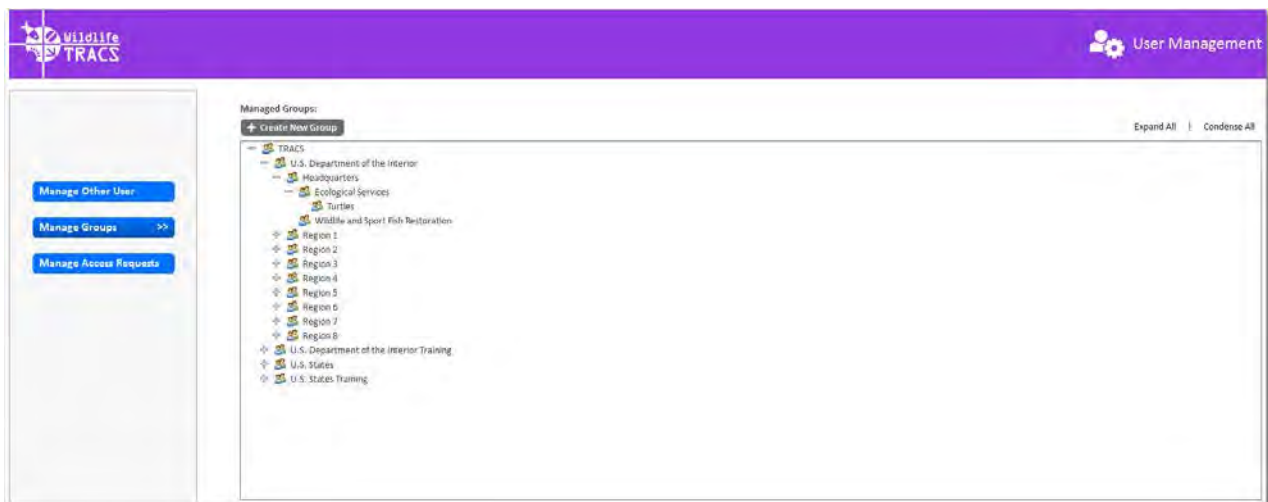
Edit Profile and Permissions

Additional access can be assigned by a User Administrator in the Edit Profile -> Edit Permissions form. A user can request the additional access by submitting a request from the Profile form but it is not required.

Note: A user can submit a request for access to an additional group or to be assigned a particular role using the Profile tool. Click the Request Access link to initiate a new request.

Step 1
- Select Manage Other Users from the User Management Module
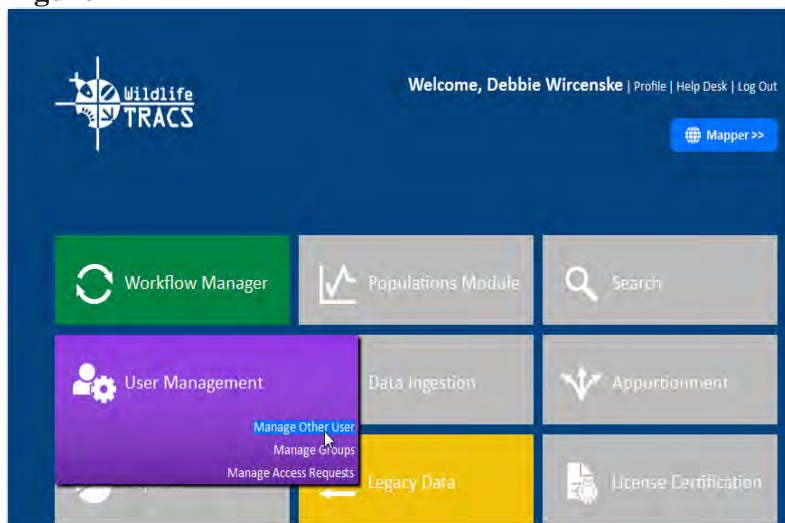
Figure 1

(Figure 1)

Step 2
- Type the first three letters of the requesting user's first or last name
- Select the applicable requesting user from the drop down list.

Figure 2
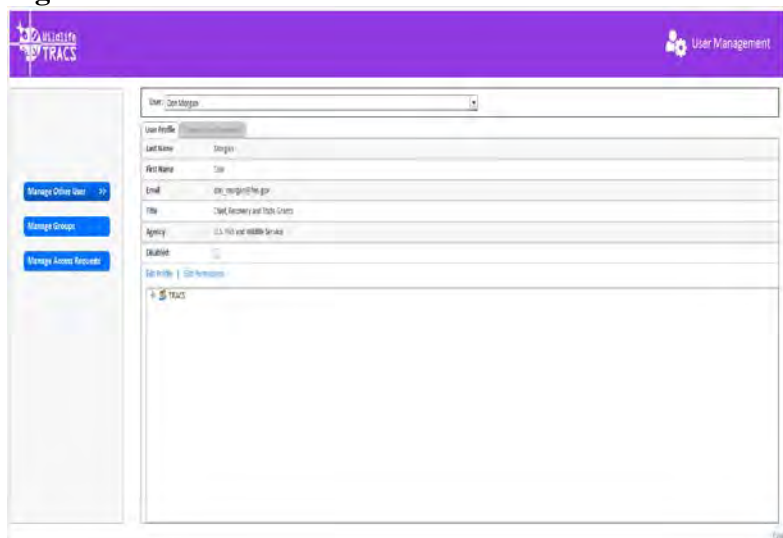
(Figure 2)

Step 3
- Click the Edit Permissions link.

Figure 3
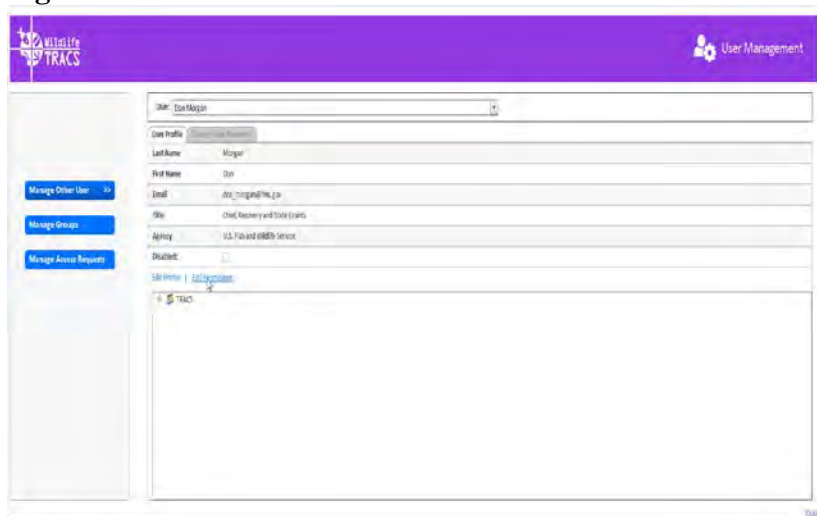
(Figure 3)

Step 4

- Select the applicable Group.
- Click the Add Selected Permission button and select the applicable role.
- Click the Save [✔ Save] button

Figure 4
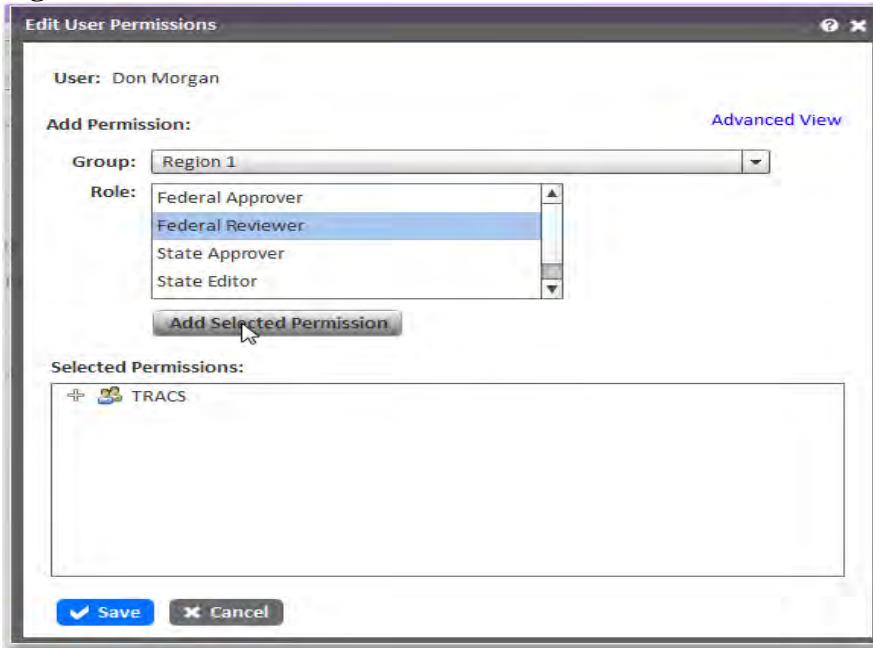
(Figure 4)

Note: Select the Advanced View if the requesting user requires access to a group outside his/her regional/state jurisdiction for a specific task.

Step 5

- Select the applicable Entity to which the selected Role applies. TRACS has four major data entities (e.g. Plan, Project, Population, Federal Funding Source).

Figure 5
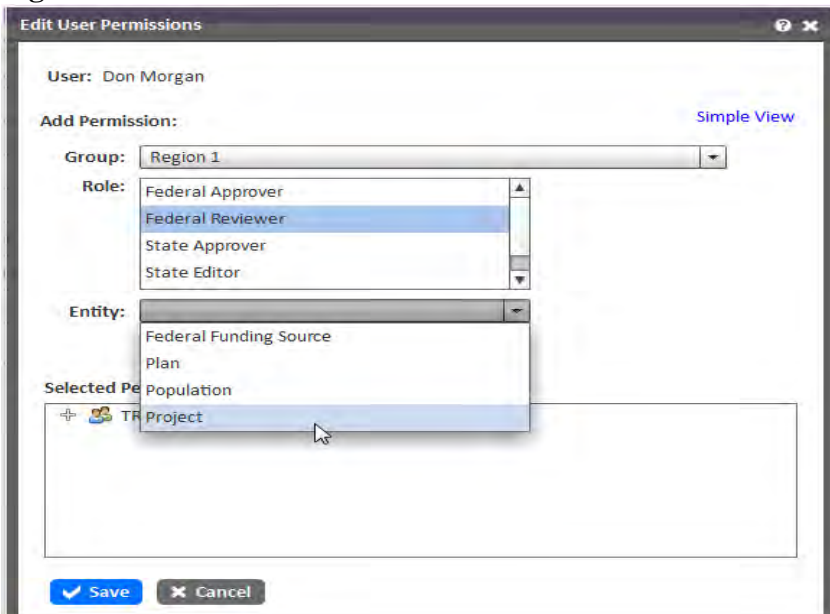
(Figure 5)

Step 6

- Click the Add Selected Permission button.
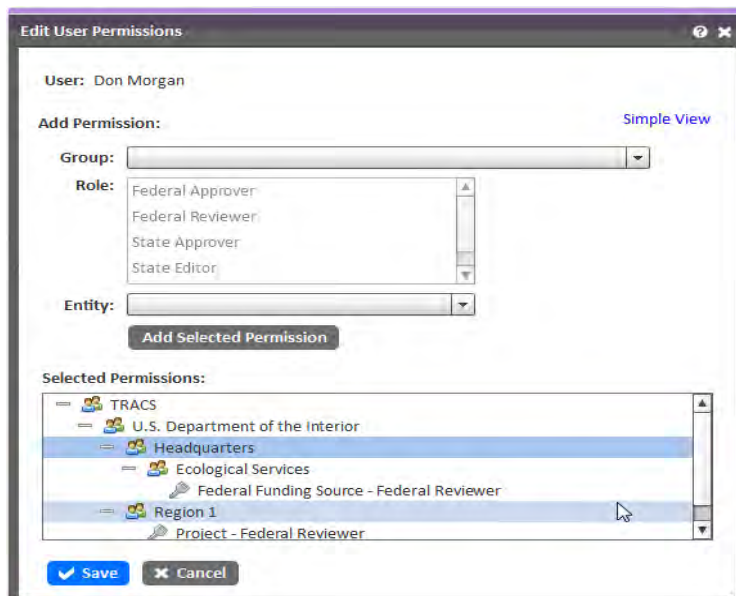
(Figure 6)

Step 7

- Click the Save button.
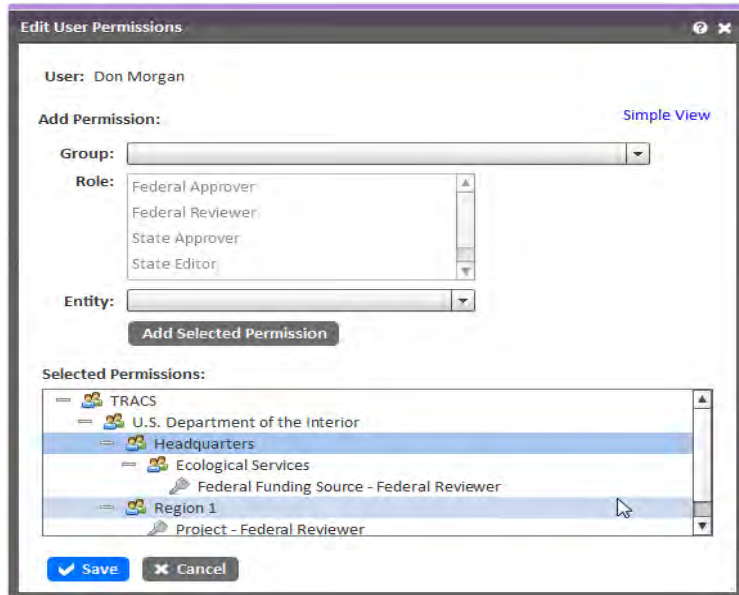
Placeholder for addtl screen shot when error message has been fixed
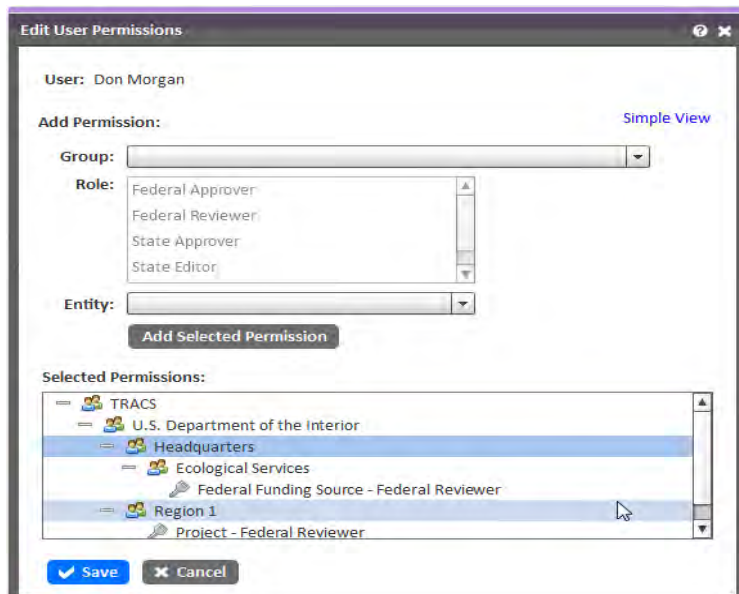
Placeholder need to show Profile info when error message is fixed

Disabling A User

User Administrators are responsible for deactivating end-user accounts when access is no longer needed.

Note: A user account that has been disabled can be reactivated by the User Adminstrator using the Manager Other User tool. The deactivated user does not need to submit a new access request.

Step 1
- Select the Manage Other User from the User Management Module
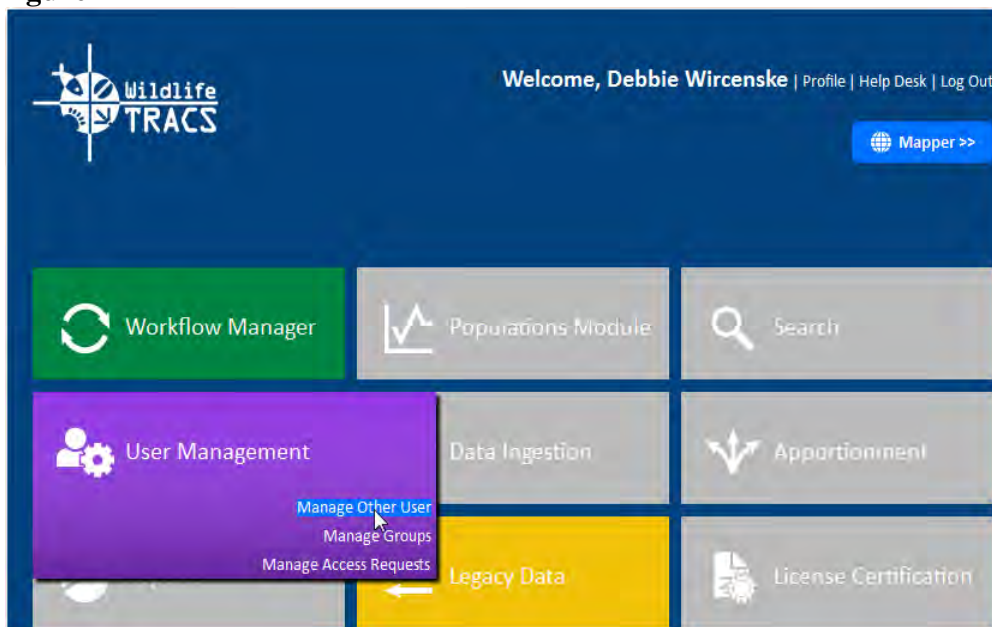
Figure 1

(Figure 1)

Step 2

- Type in first three letters of the user's first or last name.
- Select the applicable user from the drop down list.
- Click the Edit Profile link.

Figure 2
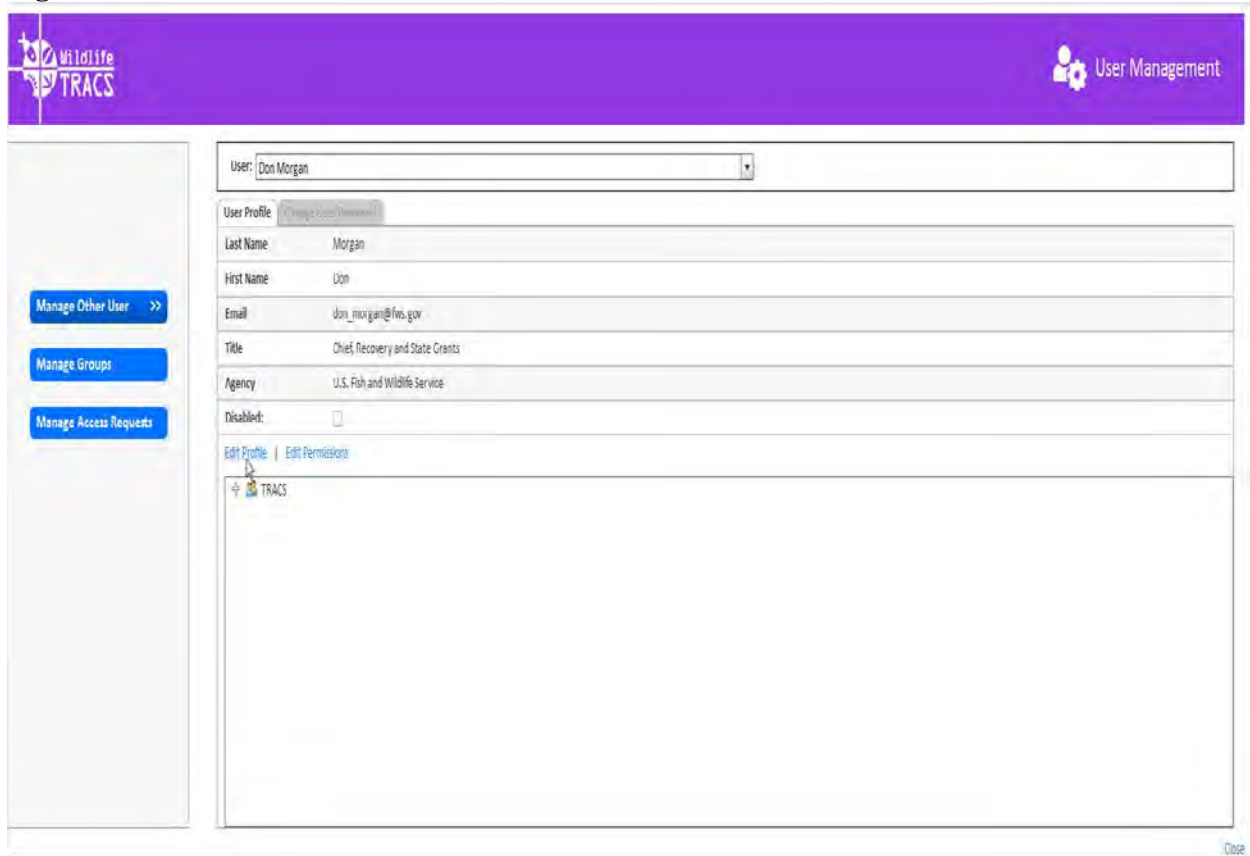
(Figure 2)

Step 3
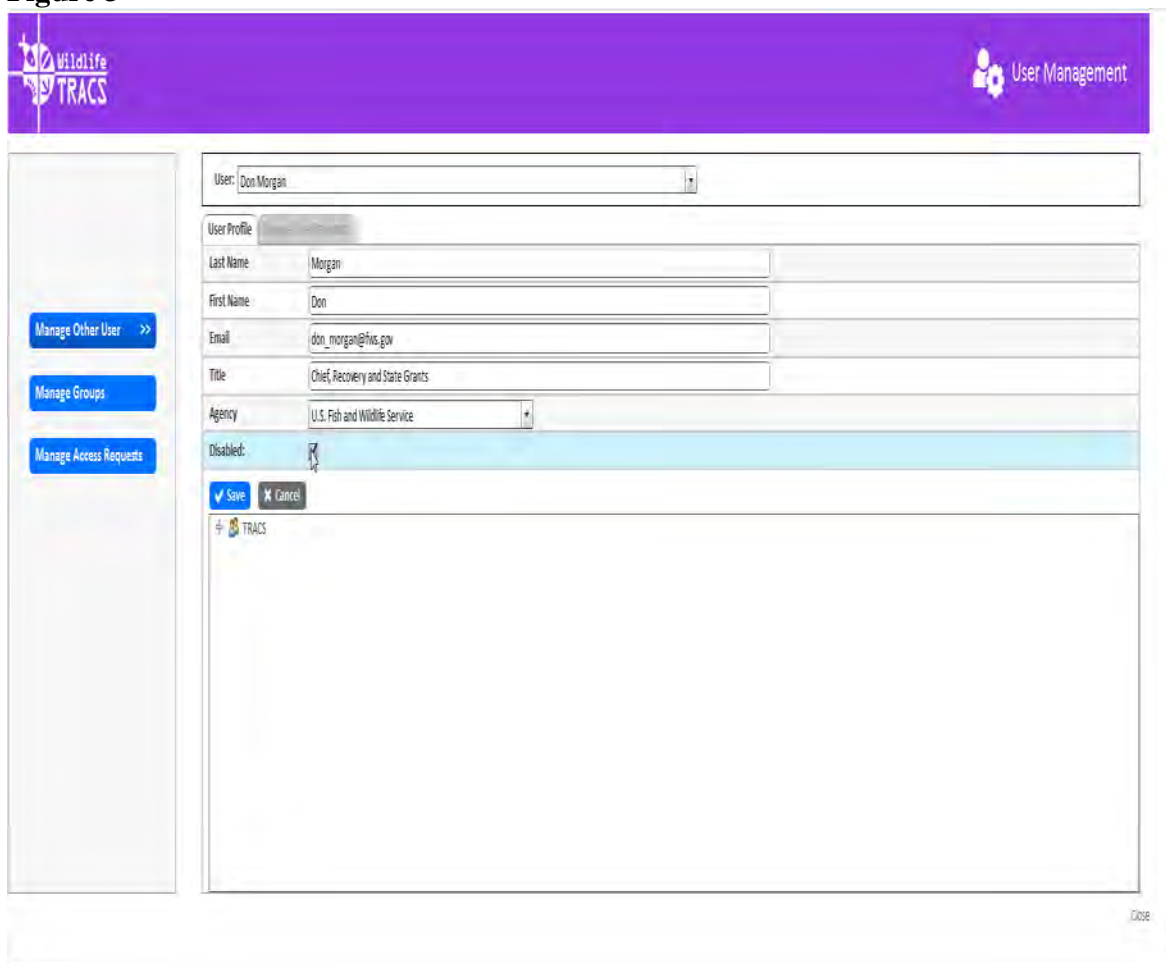
- Check the Account Disabled box located under the Agency field.
- Click the ✔ Save button.

Figure 3

(Figure 2)

Chapter 2 – Dashboard and Mapper

The Willdife TRACS dashboard is a central point of access to the Data TRACS application. The Wildlife TRACS dashboard consists of modules, tools, reports and functions.

Users who have successfully logged into DataTRACS will be directed to the Wildlife TRACS dashboard.

Users will notice that some of the Data TRACS application modules are temporarily greyed out. The greyed out modules are in the development phase and will be made available to users as they are completed.

The Data TRACS modules currently available to users include Workflow, User Management, and Legacy Data.

Figure 1
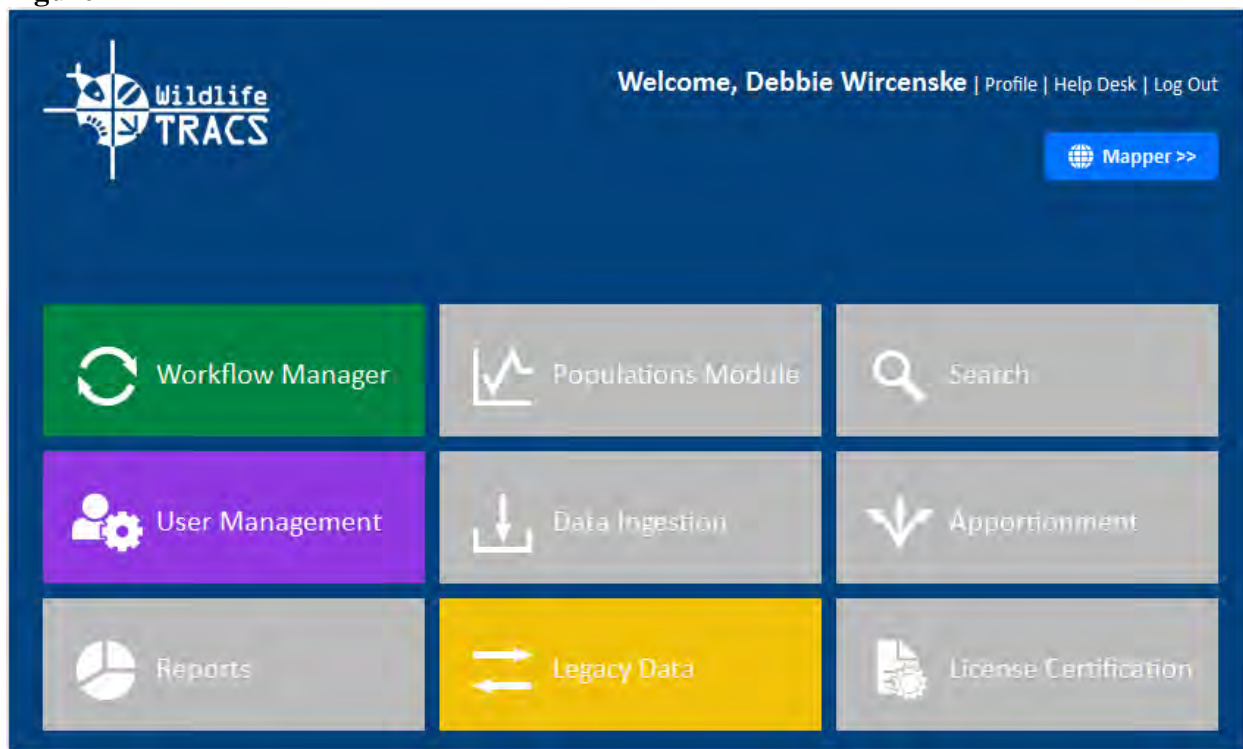
(Figure 1)

The Workflow Manager allows Wildlife TRAC users to view and manage the status of their project(s) within the project or grant lifecyle.

User Management allows User Administrators the ability to approve access requests for Data TRACS, edit and create user groups, and assign roles and permissions.

Legacy Data allows WSFR Wildife TRACS users to view and manage legacy records from the Federal Aid Information System (FAIMS).

Located in the upper right hand of the Wildlife TRACS dashboard are links that include Profile, Help Desk, and Log Out.

Figure 2

(Figure 2)

The Profile tool allows Wildlife TRACS end-users to view their Wildlife TRACS profile, roles, and permissions and provides the capability for users to change their password.

The Help Desk function allows Wildlife TRACS end-users to submit a help desk ticket. Help desk tickets can also be submitted directly to tracs-helpdesk@fws.gov.

The Log Out function allows end-users to close the Wildlife TRACS application and end the session.

The Mapper tool allows Wildlife TRAC users to access the mapper to view and manage project data.

Figure 3

(Figure 3)

Navigating the Mapper

The Wildlife TRACS mapper allows end-users to view and manage project data in a geographic context. The data created by Wildlife TRACS end-users in the mapper identifies the specific geographic location of plans, projects, and actions.

- Select the Mapper button located in the upper right hand corner of the Wildlife TRACS dashboard

Figure 1

(Figure 1)

The mapper will be displayed on your desktop.

Figure 2

(Figure 2)

Mapper Toolbar

The toolbar located in the top middle of the mapper is referred to as the Mapper Toolbar. The toolbar is dimmed by default until the mouse cursor hovers over it.

Figure 3
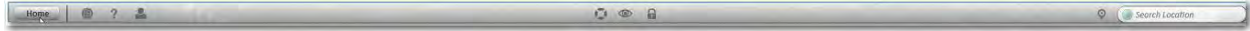
(Figure 3)

The components of the Mapper Toolbar are listed below with a brief description.

 Returns end-users to the Wildlife TRACS dashboard.

 Displays a list of available basemaps in Wildlife TRACS. The Bing Hybrid map is visible by default. Basemaps are used to display specific location by features and characteristics. For example, a road basemap reflects the features (small-scale) and characteristics of roads for a specific location. A topographic basemap reflects the features (large-scale) and charasteristics present at a specific geographic location (e.g. elevation).
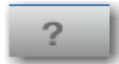
 Help Desk. End-users can submit a Help Desk request to the TRACS support team.
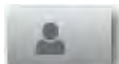
 Log out of Wildlife TRACS and end the current session.

 Guided Process Tool guides an end-user through the data entry workflow.
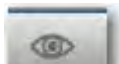
 Identify Visible Map Features allows end-users to view summary information for map features that are visible on the map.

 Toggle Map Navigation allows end-users to lock the basemap so it does not move when using the cursor to draw a feature.
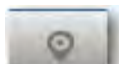
 Reverse Geocode allows end-users to obtain geographic coordinates and street address for a specific location.
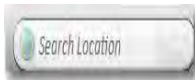
 Search location allows end-users to search for specific geospatial location by street, address, latitude / longitude, survey data, street address, county, state, etc.

Navigation Tool

The Navigation Tool is located in the upper left hand corner under the Mapper Toolbar.

Figure 4

(Figure 4)

The components of the Navigation tools are listed below with a brief description

 Pan mode allows end-users the ability to grab and move the map in any direction by left clicking on the map.

 Zoom In allows end-users to zoom in on a particular map area by drawing a box.

 Zoom Out allows end-users to zoom out on the map by drawing a box.

1:X Show Map Scale allows end-users to toggle the map scale located at the center bottom

of the basemap. 1:1,155,581 ▭ 50 mi ▭ 50 km

Show Mouse Coordinates displays the latitude/longitude at the end-user's mouse cursor location.

Show Overview Map allows end-users to view a world street map superimposed on the current basemap. This is useful for determining street location when viewing sattelite imagery.

Feature Editor and Explorer Tools

The tools located on the far left side of the Mapper are referred to as the Feature Editor dock.

Figure 5

(Figure 5)

The components of the Feature Editor dock are listed below with a brief description.

Restore Dock opens and miminizes the Feature Editor and Feature Explorer tools.

Feature Editor allows end-users to create and edit plans, projects, and actions.

Feature Explorer allows end-users to navigate, browse, and edit data includinng plans, projects, and actions.

 Feature Search allows end-users to search for existing plans, project, or actions. Searches can be performed using the feature name or ID number.

Layer Manager Tool

The dock located on the far right side of the Mapper is referred to as the Layer Manager tool.

Figure 6

(Figure 6)

The components of the Layer Manager tool are listed below with a brief description.

 Restore Dock opens or closes the dock.

 Layer Manager allows end-users to control the visibility of reference layers (e.g. external datasets and TRACS features) on the mapper.

Note: Reference layers can assist with creating features like plans, projects, and actions.

 Bookmarks allows end-users to bookmark geographic locations for quick reference in the future (e.g. project location, region, state, county). Bookmarks are specific to a individual user account but can be shared.

Map Legend allows end-users to view symbology and labels for reference layers and TRACS features. Specific colors and shapes are used to identify items of interest (e.g. habitat types).

Note: The Map Legend is empty unless a reference layer is made visible using the Layer Manager.

Adding Reference Layers
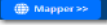
Step 1
- Navigate to the Wildlife TRACS dashboard.
- Select the Mapper button located on the Wildlife TRACS dashboard
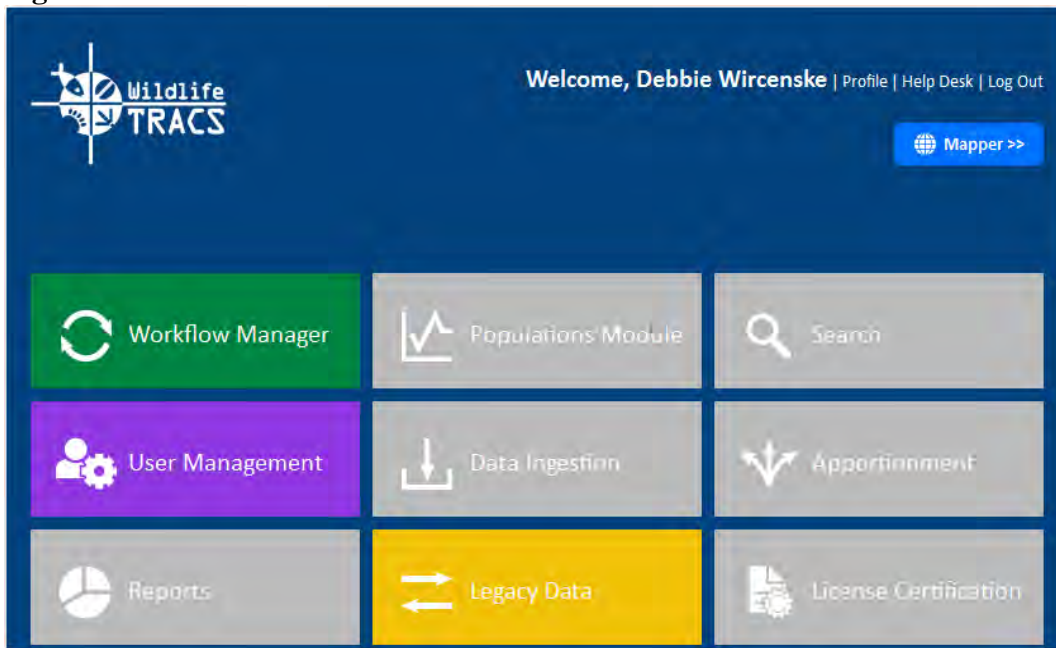
Figure 1

(Figure 1)

Step 2

- Select the Restore Dock icon [>] located in the Layer Manager Panel in the right hand corner

Figure 2
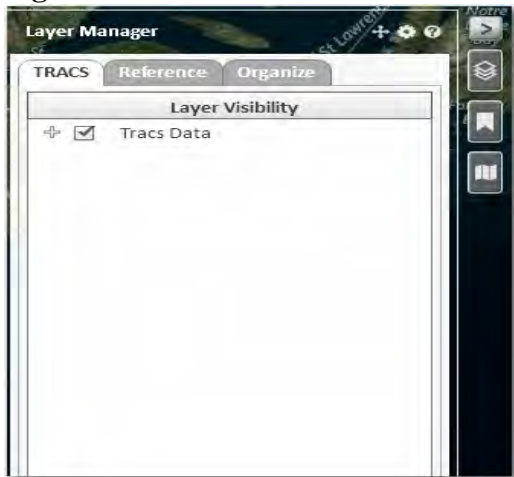
(Figure 2)

Hint: TRACS Data is the default.

Step 3

- Select the Reference Tab

Figure 3
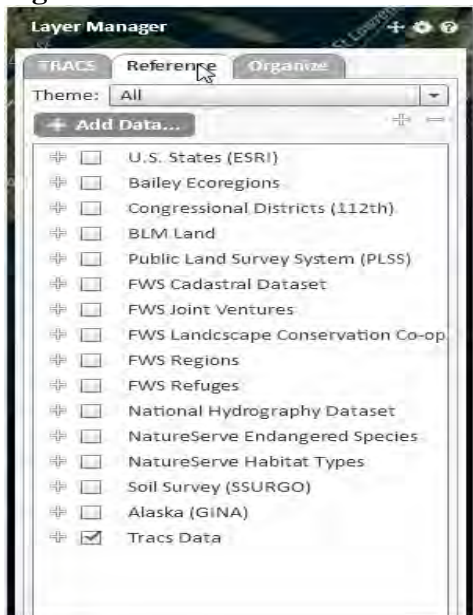
(Figure 3)

Step 4

- Select the plus sign ⊞ using the left button on your mouse to expand available layers and select U.S. States (ESRI) and States

Figure 4

(Figure 4)

Step 5

- Select the Organize tab to arrange and increase layer transparency

Figure 5

(Figure 5)

Hint: U.S. State borders on the map are less defined as the transparency increases.

Repeat the process to display additional reference layers.

Step 6

- Select NatureServe Habitat and expand to include Broad Habitat Types (low res)

Figure 6

(Figure 6)

Use the Legend tool to determine what the shaded colors represent.

Step 7

- Select the Map Legend from the Layer Manager Tool

Map Legend
NatureServe Habitat Types
TRACS1

- Agricultural
- ARCTIC AND ALPINE
- BARREN/SPARSE VEGETATION
- DESERT SCRUB
- Developed
- FOREST (closed canopy)
- FRESHWATER WETLAND
- GRASSLAND (temperate, non-desert)
- MARINE
- Riverine & Lacustrine
- SALTWATER WETLAND
- SAVANNA/OPEN WOODLANDS (open to br
- SHRUBLAND (temperate, non-desert)
- WOODLAND (variable, non-closed canopy)

(Figure 7)

Step 8

- Select the Minimize Dock icon [>]
- Go back to the Layer Manager and Select the Reference Tab [Reference]
- Unselect the NatureServe Habitat Types and Broad Habitat Types (low res)

Figure 8
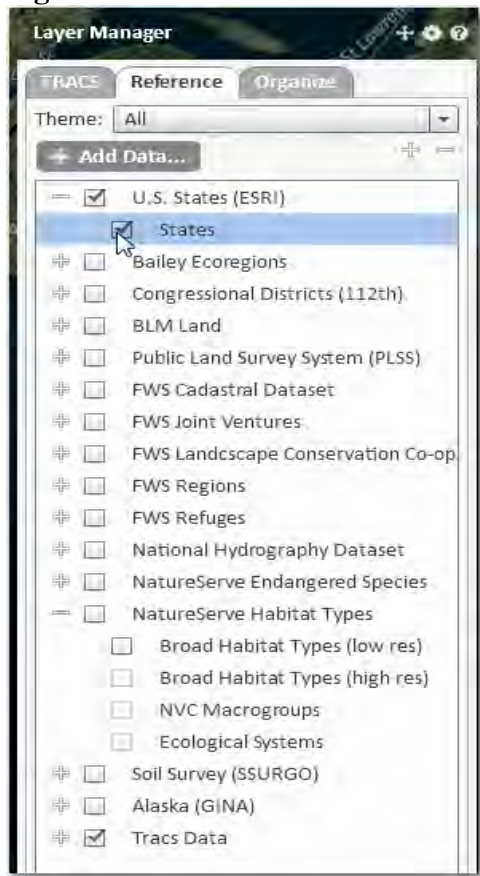
(Figure 8)

Step 9

- Select the Minimize Dock icon [>]

You are now ready to proceed with creating a TRACS feature.

Chapter 3- Plan

Frequently Asked Questions

What is a Plan?

A Plan is a defined and accepted strategy for achieving specific goals within a defined geographic region. Plans are optional in TRACS. Plans allow end-users to establish linkages between strategic planning objectives and projects implemented.

Can Plan objectives be inherited by Projects?

Plan objectives can be inherited by projects. Under Project Statement Objectives, the "Inherit from Plan" button allow end-users to choose a plan and objectives to inherit.

Who should enter Plan information for a Federal or inter-state plan?

It is highly recommended that a WSFR staff member enter information from a federal or inter-state Plan for maximum efficiency. The exception is if a State wants to inherit specific objectives pertinent to their project(s). In this scenario, it is helpful for the State to enter the Plan objectives even though more general information for the Plan may have been entered into Data TRACS by someone else.

Note: Specific TRACS features should be set to visible using the Layer Manager prior to creating a plan, project, or action. Plans are NOT visible by default and should be toggled to visible prior to defining a new Plan.

Creating a Plan

Step 1
- Open the Feature Editor dock.

Step 2

- Select the [icon] icon as the drawing tool. (The example is a statewide plan.)

Figure 1
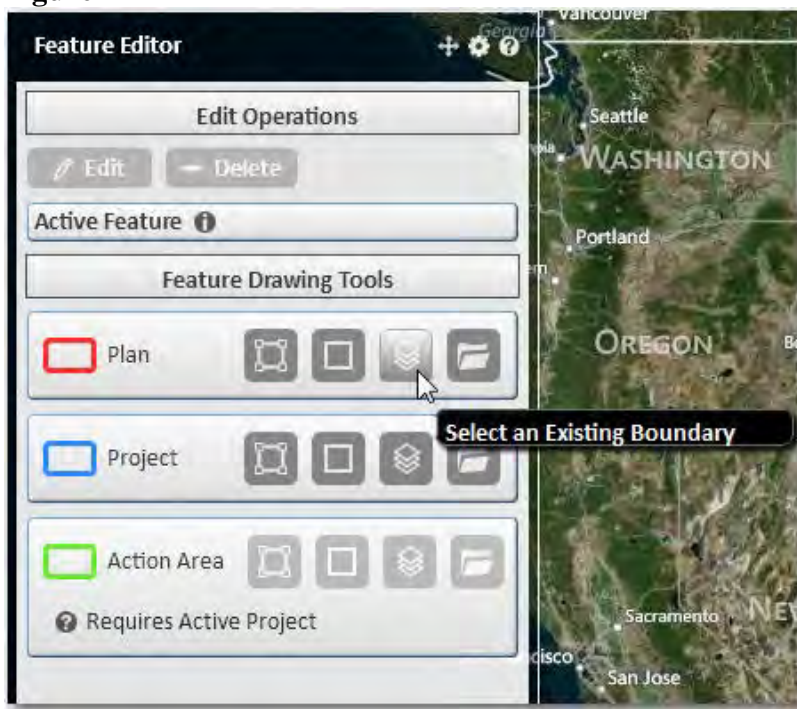
(Figure 1)

Hints: Feature Drawing Tools

The Freehand Polygon allows end-users to capture specific location areas which are contoured. e.g., habitat area, forested area. Freehand Polygon is created by holding down the left mouse button and moving the cursor until the desired polygon is visible and then releasing the left mouse button.

Geometic Polygon allows end-users to capture specific location areas which are linear (point-to-point). Geometic Polygon areas are created by left left clicking the mouse of the map to a single vertex. Continue clicking the left mouse button at each vertice of change in drection until the desired polygon is visible. Double click the left mouse button to complete the feature.

Select an Existing Boundary allows end-users to capture specific location areas which have pre-determined boundary types. e.g, States, Counties, Congressional Districts. Select this tool if a plan and project is Statewide or for a specific County.

Import Shape Files allows end-users to import shape files from a local source. A shape file contains spatial features which represent a specific type of location. e.g., rivers and lakes.

Figure 2
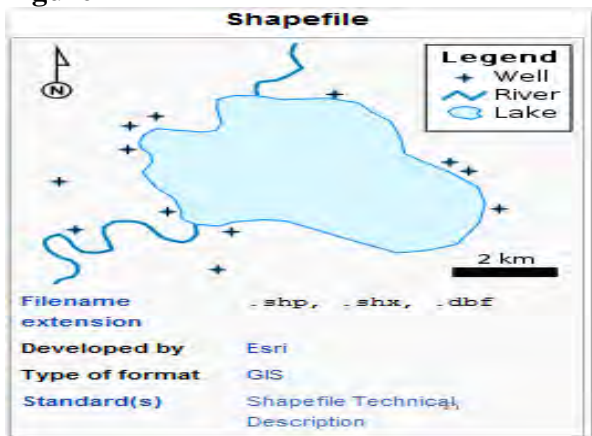
(Figure 2)

Step 3

- Highlight Arizona and click the Select button

Figure 3
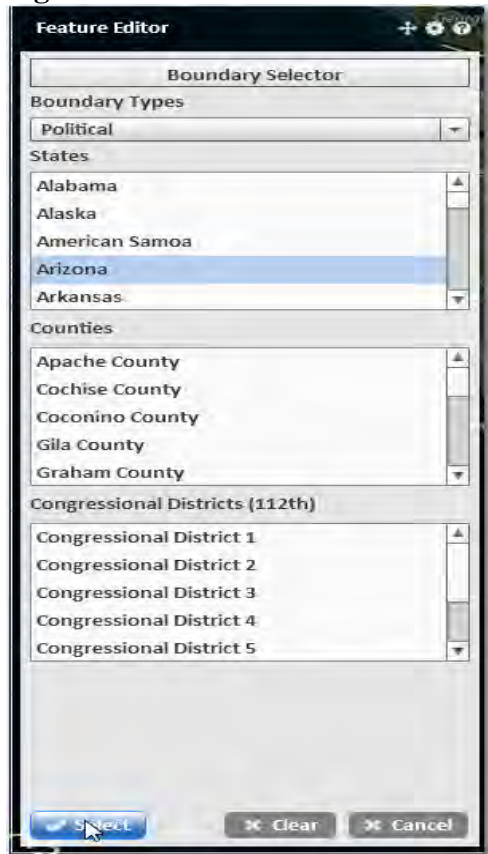
(Figure 3)

Note: The plan polygon for the State of Arizona is outlined in red.

The Feature Editor will be displayed select the Plan Properties.

Plan - Properties

Step 1
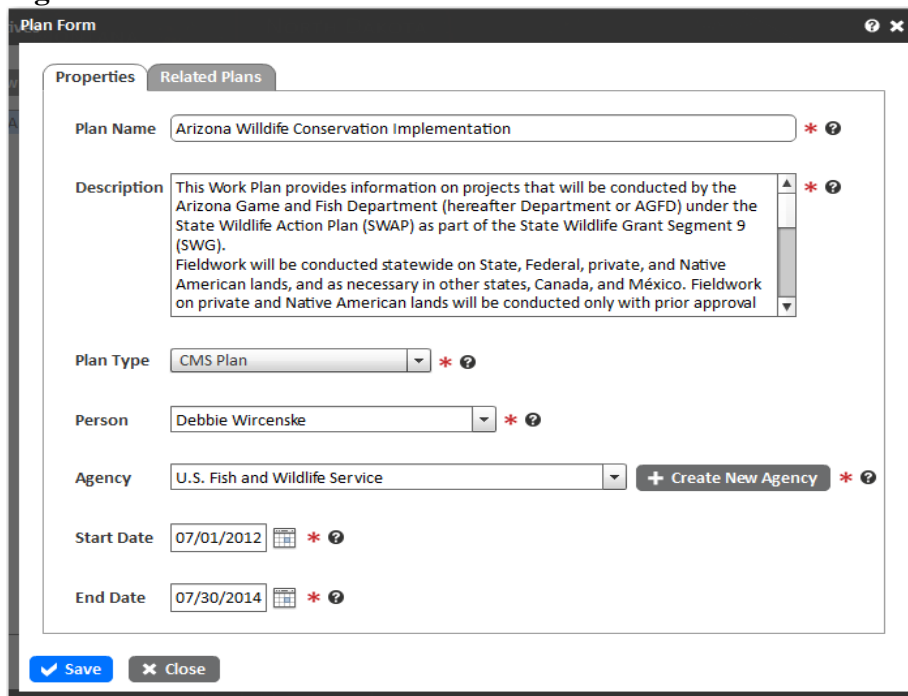
- Select the Properties link from the Feature Editor.
- Enter the Plan Name i.e., Arizona Wildlife Conservation Implementation.
- Enter or copy a description of the Plan.

Hint: You can use the Ctrl+V to cut and paste from other source documents. **The Description field accepts an unlimited number of characters.**

- Select the Plan Type from the drop down list i.e., CMS Plan.
- Enter the first three letters of the first or last name and select from the drop down list (e.g. "deb" for Debbie.)
- Enter the first three letters of the Agency (e.g. U.S. Fish and Wildlife Service).
- Select the Agency Type (e.g. Federal).
- Select the calendar and select the start and end date

Hint: Dates can be selected from the calendar located to the right of the Start and End Date fields or manually entered as MM/DD/YEAR.

Figure 1

(Figure 1)

Note: If no matches are found for the Agency, click the Create New Agency button**.**

.

Step 2

- Select the Agency type (e.g.Federal, State, Tribe) from the drop down list.
- Select the Agenc Name from the drop down list.
- Enter an Agency Abbreviation and Description.
- Select the State from the drop down menu.
- Select the Parent Agency if applicable.

Figure 2

(Figure 2)

Step 3
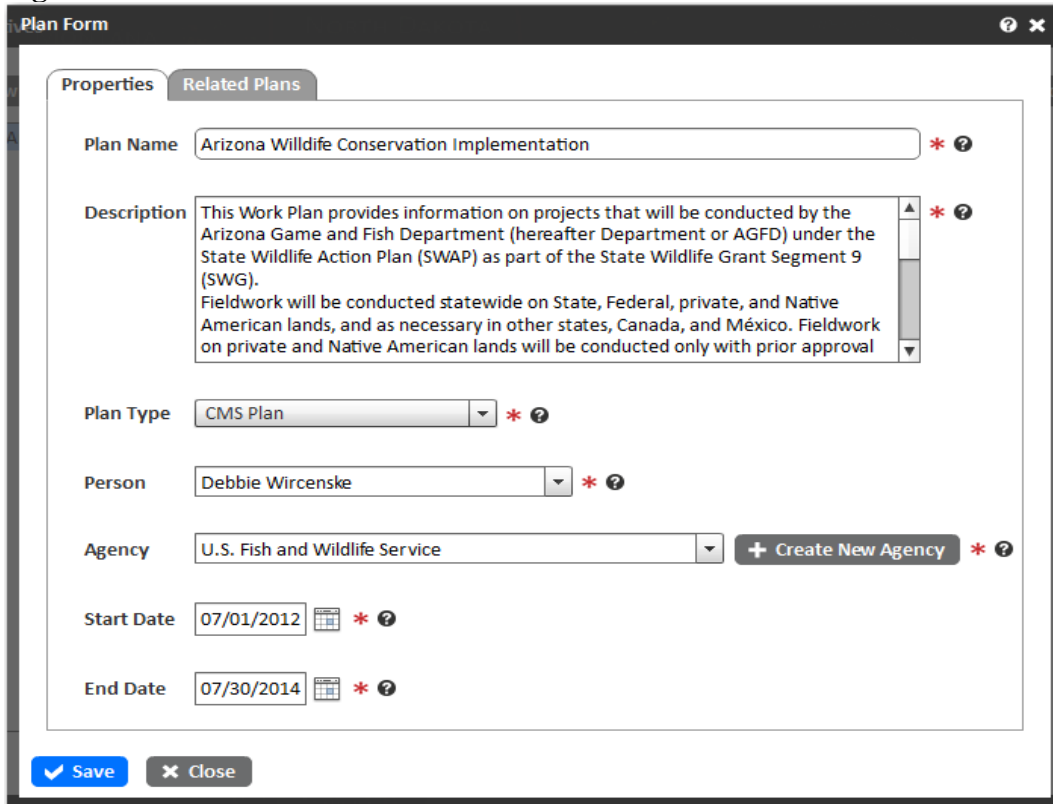
- Click the Save button to save the new Agency.

Step 4

- You are returned to the Plan form.

Figure 4

Plan Form

Properties | **Related Plans**

Plan Name Arizona Willdife Conservation Implementation

Description This Work Plan provides information on projects that will be conducted by the Arizona Game and Fish Department (hereafter Department or AGFD) under the State Wildlife Action Plan (SWAP) as part of the State Wildlife Grant Segment 9 (SWG).
Fieldwork will be conducted statewide on State, Federal, private, and Native American lands, and as necessary in other states, Canada, and México. Fieldwork on private and Native American lands will be conducted only with prior approval

Plan Type CMS Plan

Person Debbie Wircenske

Agency U.S. Fish and Wildlife Service   ➕ Create New Agency

Start Date 07/01/2012

End Date 07/30/2014

✔ Save   ✖ Close

(Figure 4)

Note: If Related Plans are applicable proceed to Step 5.

Step 5
- Select the Related Plans tab.
- Select the Parent Plan from the drop down list.
- Select the Add Related Plan from the drop down list.
- Select the Save button.
- Select the Close button.

Figure 5

(Figure 5)

Step 6

- Click the Save button to save the Plan.

Figure 6
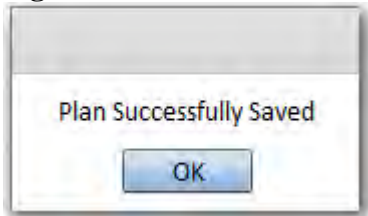
(Figure 6)

Note: At the bottom of the Feature Explorer window, under the Feature Summary tab, you can view summary information about the Plan. Additional summary information can be viewed by using the scoll bar to the right side.

Plan - Objectives

Step 1

- Select the Plan Objectives for in the Feature Explorer.
- Click the New Need/Threat or New Purpose Target button.
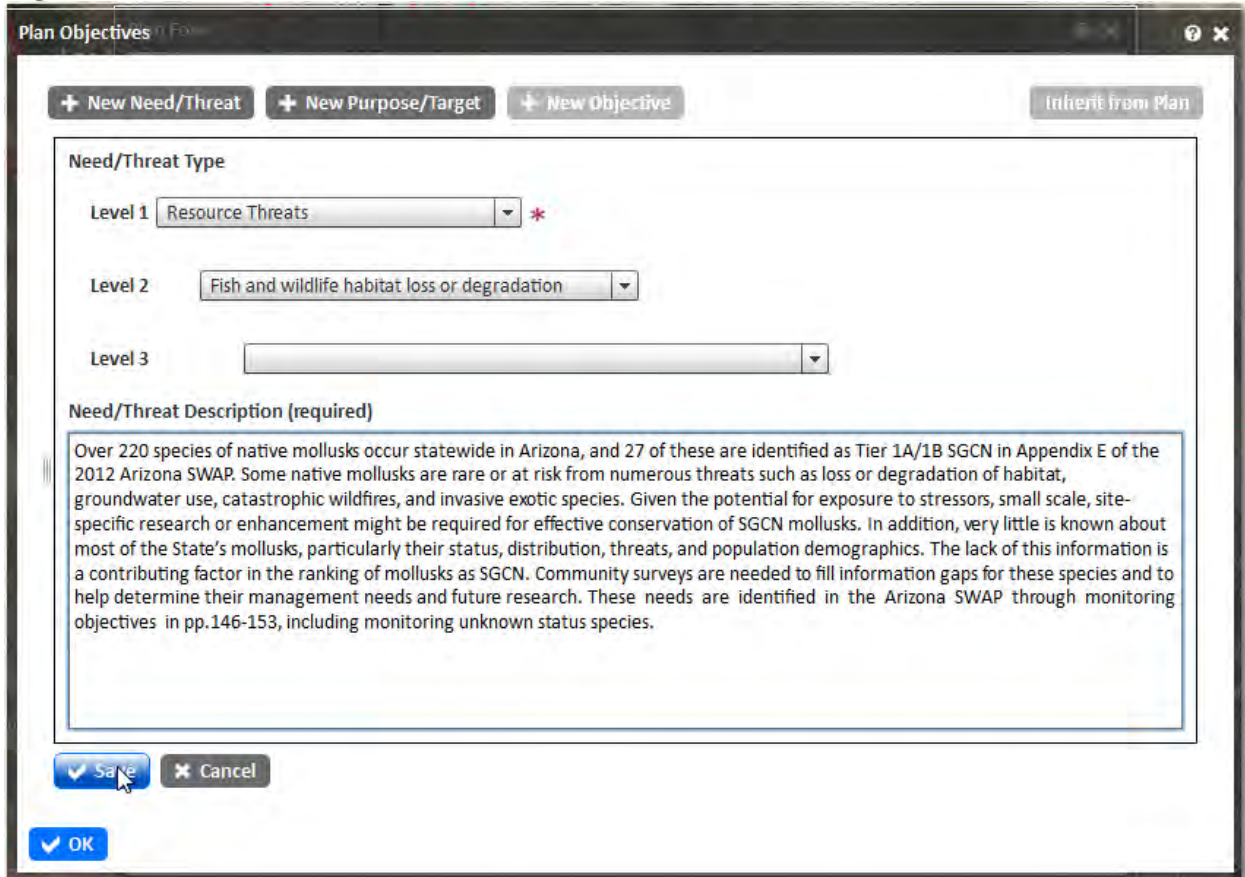
Note: The New Need/Threat button was selected.

- Select a Level 1 and 2 Need/Threat Type from the drop down menu.

Note: Level 3 is optional.

- Complete the Need/Threat Description field.
- Select the Save button .
- Select the OK button.

Figure 1

(Figure 1)

Step 2

- Highlight the Need/Threat in the navigation panel.
- Click the New Objective button.

Figure 2
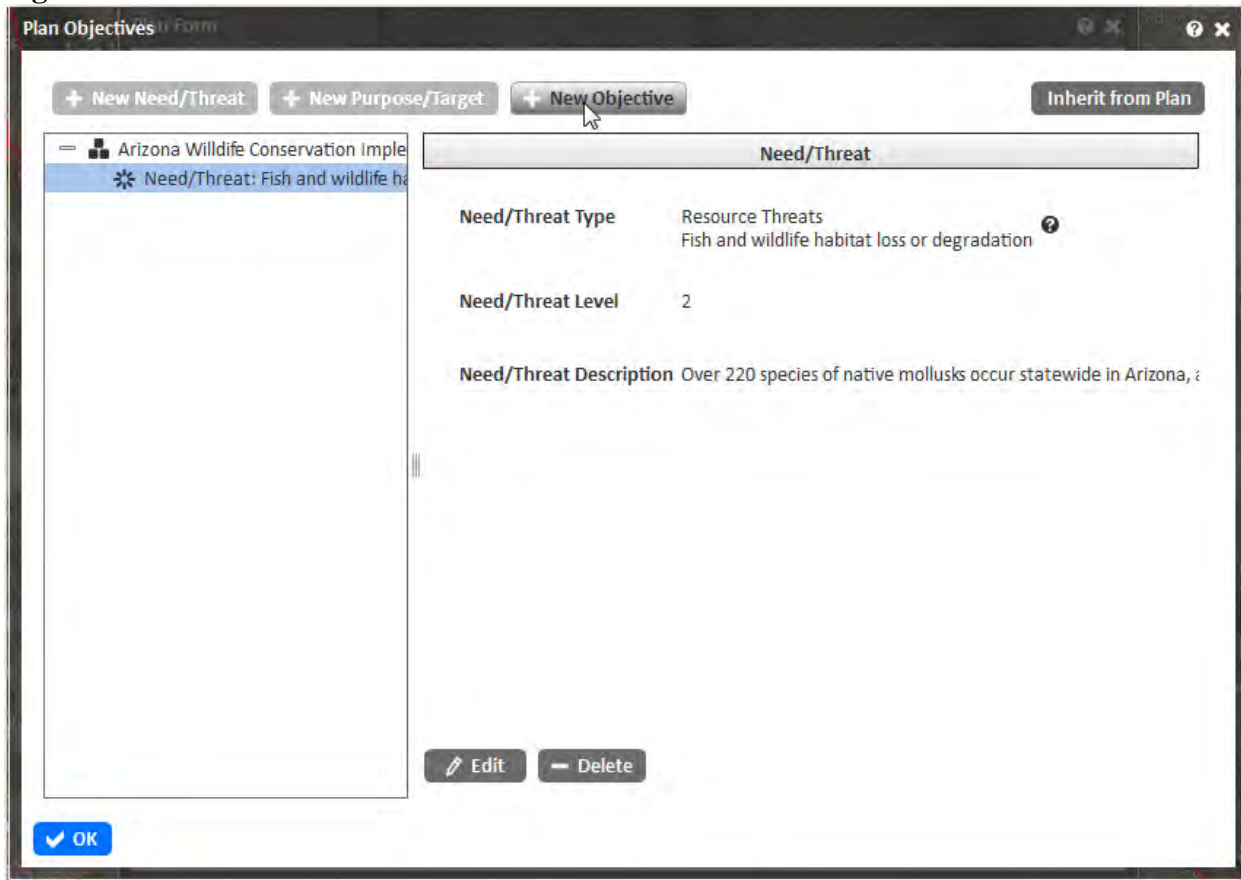
(Figure 2)
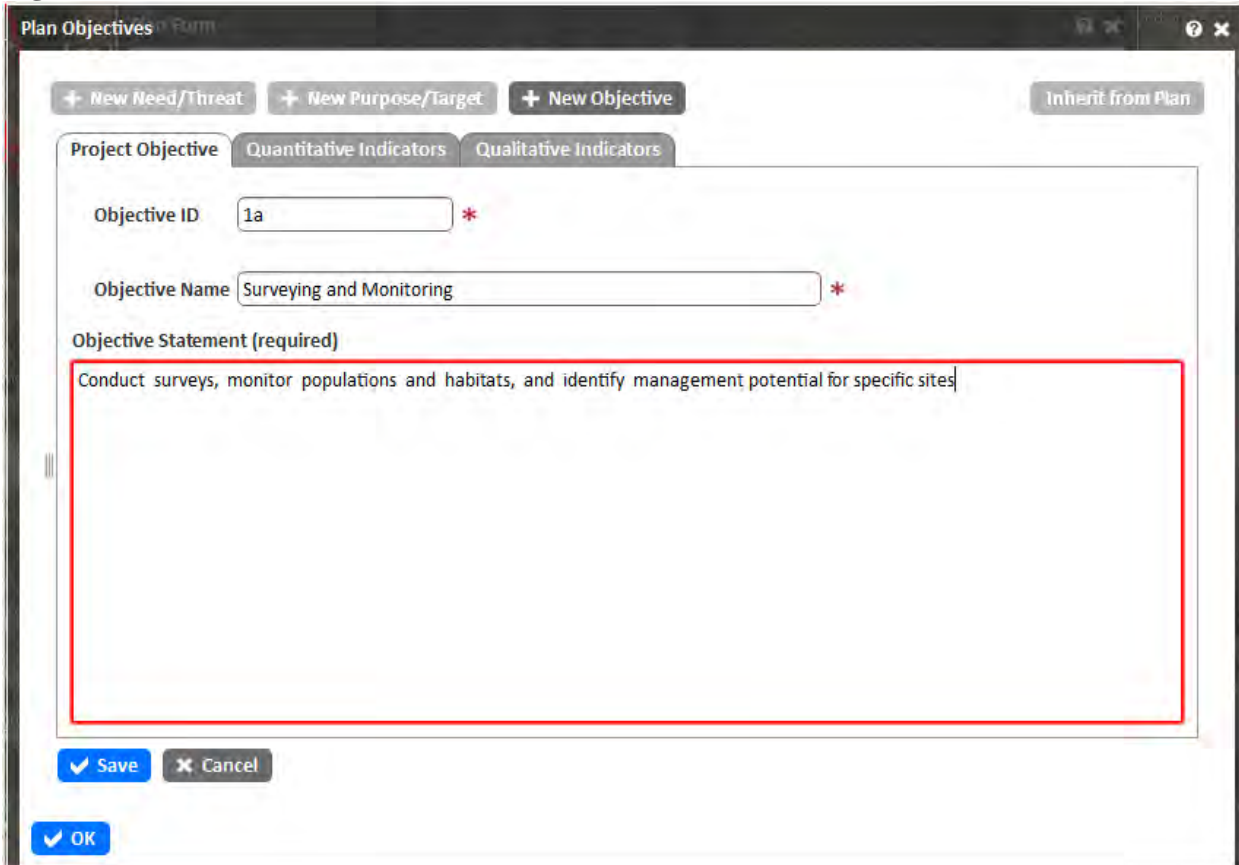
Step 3

- Enter an Objective ID.

Note: The objective id can be a combination of alpha and numeric characters.

- Enter the Objective Name.
- Enter the Objective Statement.

Figure 3

(Figure 3)

Step 4

- Select the Quantitative or Qualitative Indicators Tab.

Note: The Quanitative tab was selected.

- Select the Cateogy from the drop down list.
- Select the Strategy from the drop down list.
- Enter the Desired Value.
- Enter the Base Value (optional).
- Select the Deadline.
- Click the Add button to add the indicator.

Figure 4
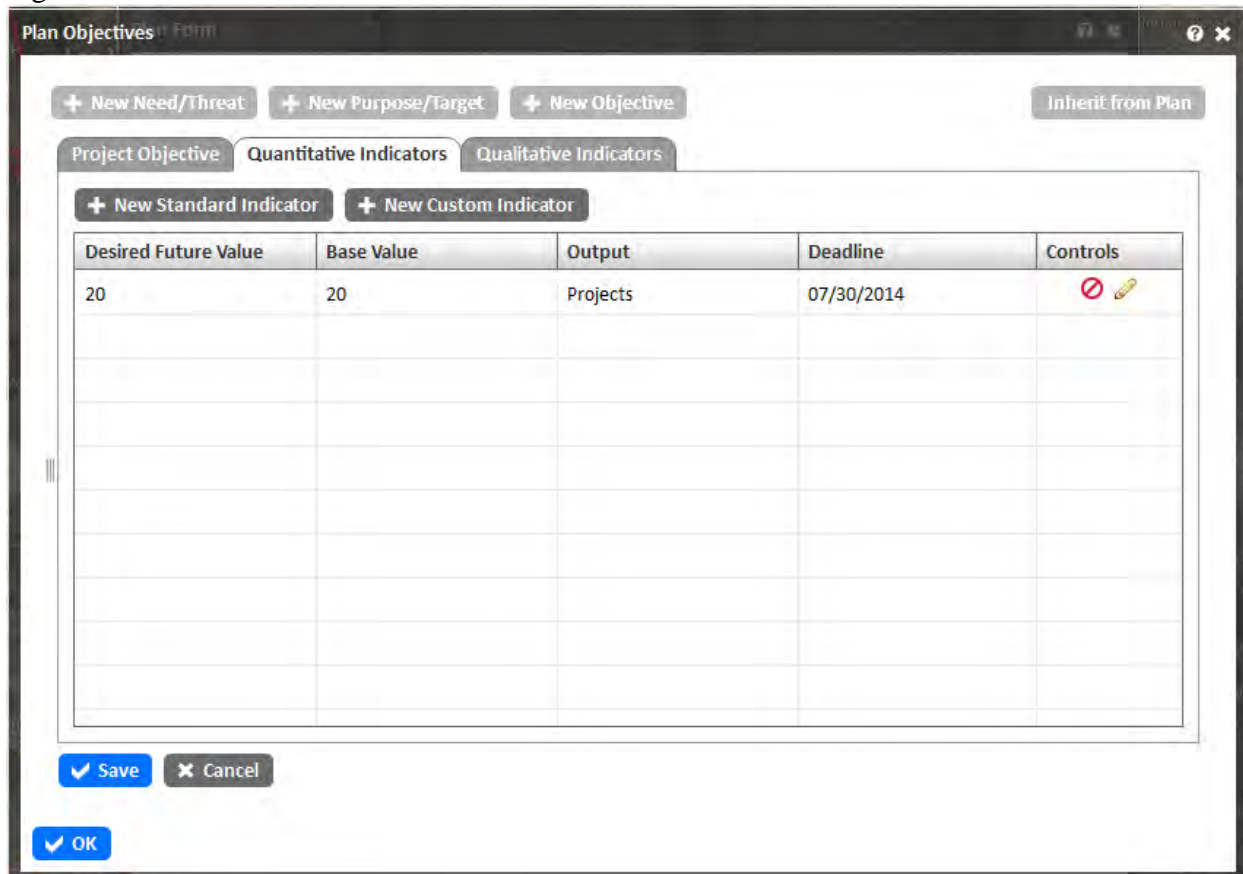
(Figure 4)

Step 5

- Select the Save button to save the objective.
- Select the OK button to close the objective form.

Figure 5
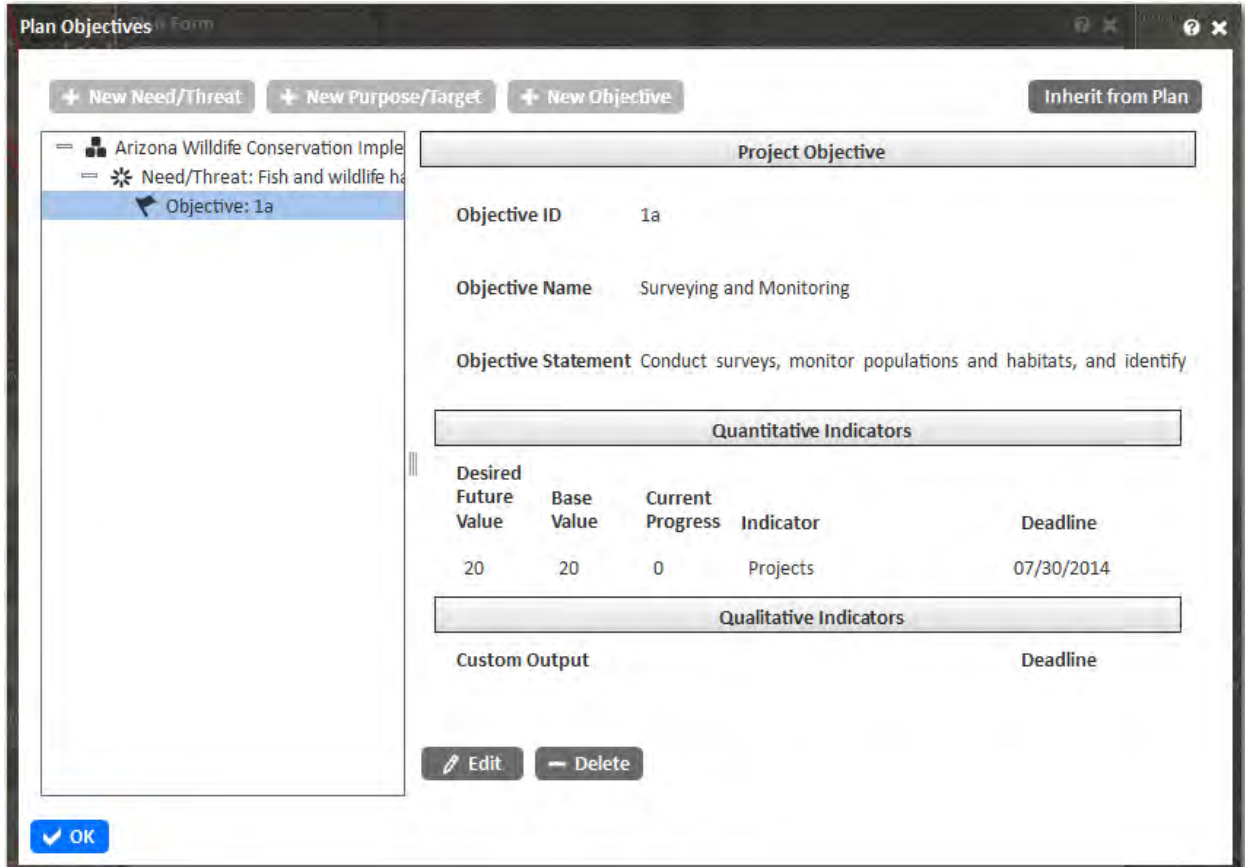
(Figure 5)

The Quantitative Indicators and Objective have been added to the Project Objective successfully.

Note: Adding an attachment to a Plan is optional.
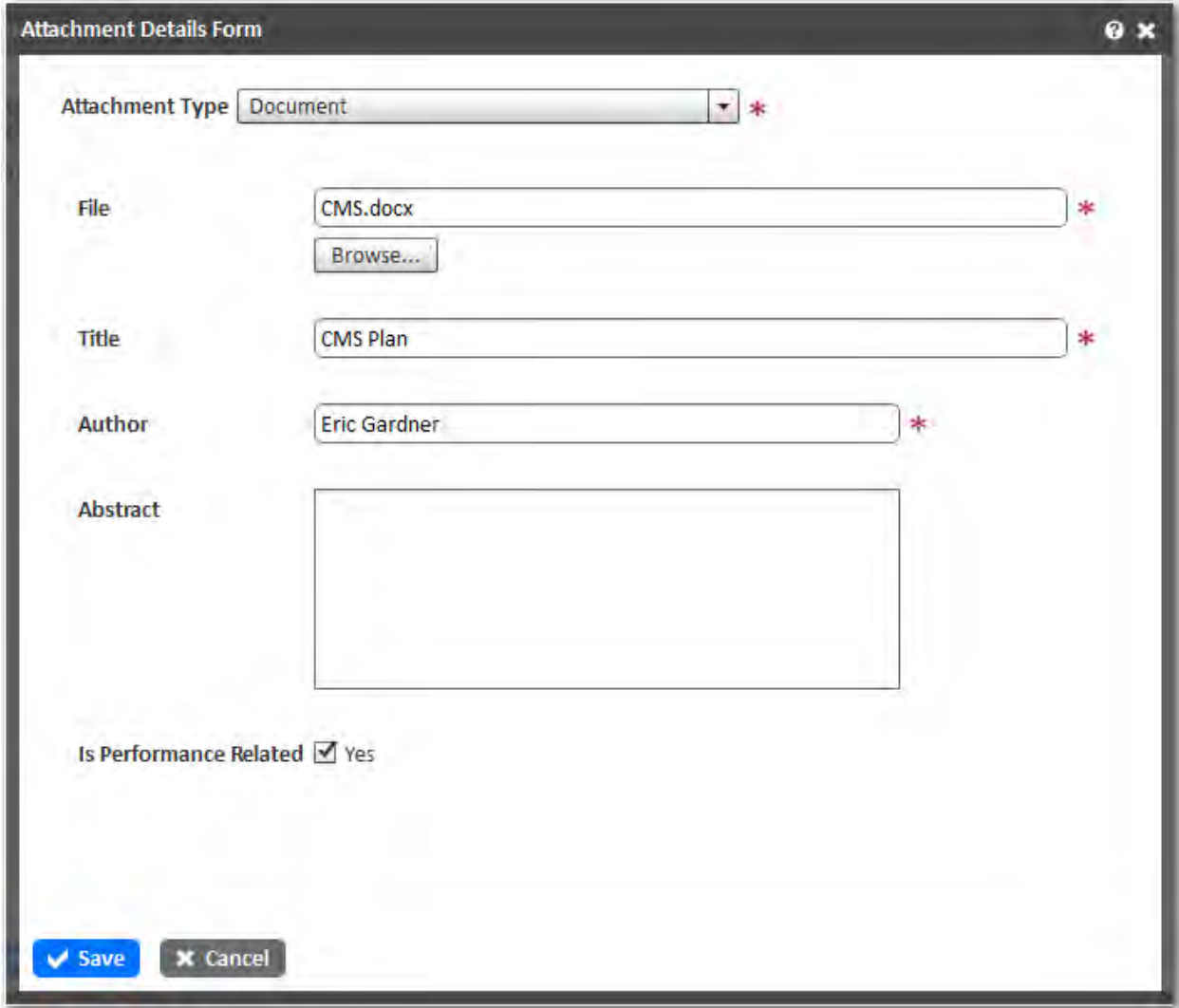
Step 6
- Select the Attachment from the Feature Editor.
- Select the Attachment Type from the drop down list.
- Chose a file from your local system by clicking the Browse button.
- Enter a Tilte and Author.

Note: If a link to the attachment should be included in performance reports select Yes.

- Click the Save button.

Figure 6

Attachment Details Form

Attachment Type	Document ▼ *
File	CMS.docx * Browse...
Title	CMS Plan *
Author	Eric Gardner *
Abstract	
Is Performance Related	☑ Yes

Save   Cancel

(Figure 6)

Congratulations you have successfully created a Plan!

Chapter 4 - Project

Frequently Asked Questions

What is a Project?

A Project is user defined to describe one or more related actions undertaken by a group of practitioners to achieve specific goals and objectives. A Project is geographically represented by a point and polygon(s) independent of scale and can be related to both parent and/or child projects. Associated data include fields required by WSFR grant program regulations including: goals, objectives, needs, results or benefits expected, approach, estimated costs, etc.

How does a Project relate to a Plan?

Projects can be nested under Plans and inherit objectives from a Plan.

Can Projects be related to other Projects?

Yes. In the properties box under a Project there is a tab called "Related Projects". You can easily search for Parent Projects or just Related Projects that are funded by WSFR grants and have been entered into Data TRACS. Other non-WSFR funded projects that may have been entered into State TRACS would not be available through this vehicle.

What are the benefits of relating Projects to other Projects in TRACS?

There are natural resource conservation and management efficiencies afforded by identifying relationships among Projects. It can help in identifying species and habitats that are receiving sufficient or insufficient attention across larger landscapes. TRACS will have the ability to include hyperlinks that users can employ to easily investigate related Projects.

Is a Project required?

Yes, just as it is stated in 50 CFR 80.82. A Project is the basis for entering data into TRACS.

How does a Project relate to a Grant?

Projects are related to Grants as they are now. There could be one project under a Grant or many projects under a Grant. The Project(s) inherit the funding source(s) identified at the grant level and are active within the starting and ending dates of the grant.

Can a Project be funded by more than one Grant or Grant Program?

Yes. TRACS has the capability to identify multiple funding sources for a Project. These funding sources could be from different Grants or from different Grant programs within the same Grant.

Is there a limit on the size of a Project?

There is no limit on the geographic size of a Project. It could be an entire state or multiple states.

Is there a limit on the duration of a Project?

Many Projects have a defined duration needed to achieve specific objectives (e.g., three years). Other Projects that are conducted as part of a fish and wildlife management plan should adopt that Plan duration (e.g., perhaps six years). However, for Projects intended to continue indefinitely (e.g., basic hunter education or fish population monitoring) the recommended maximum duration is five years to afford greater ease of use in the system.

When in the grants process is Project information entered?

Project information is added when you are writing your grant proposals. TRACS includes a grant application report that contains all Project information needed for the grant which includes:
- a map (i.e., the polygon you created to add a project into TRACS);
- the information in the project statement that includes the typical narrative requirements found in 50 CFR 80.82;
- objectives found in the project statement; and
- attachments if added

Can a Project be copied and edited to create a second Project?

Yes.

Can two different Projects in TRACS have the same name?

Yes. This will be important as WSFR work that continues year-after-year is documented in TRACS as Projects with defined, instead of infinite, time periods.

What are best practices for structuring a grant as Project(s) and Actions(s) in TRACS?

There are a variety of ways for structuring grants as Project(s) in TRACS. This will be part of the WSFR and state training on TRACS. A template has been developed to assist in diagramming this out prior to data entry. In general, grantees should consider a structure that will provide them with the most information, yet be efficient for performance reporting. Consider lumping instead of splitting. For example, if a species restoration project

includes a monitoring component, it is not necessary to have monitoring as a separate Action. The major Action is species restoration.

Creating a Project

Step 1

- Select the Mapper [🌐 Mapper >>] button on the Wildlife TRACS dashboard.

Note: Navigate the map to a desired geographical location using the Navigation Tool. Be sure the mapper is zoomed in or zoomed out enough to enable an accurate representation of the entire project area.

The example is a statewide project scale of 1:18,489,298.

- Select the Guided Process Tool from the Mapper Tool and click the New Project link.

Figure 1
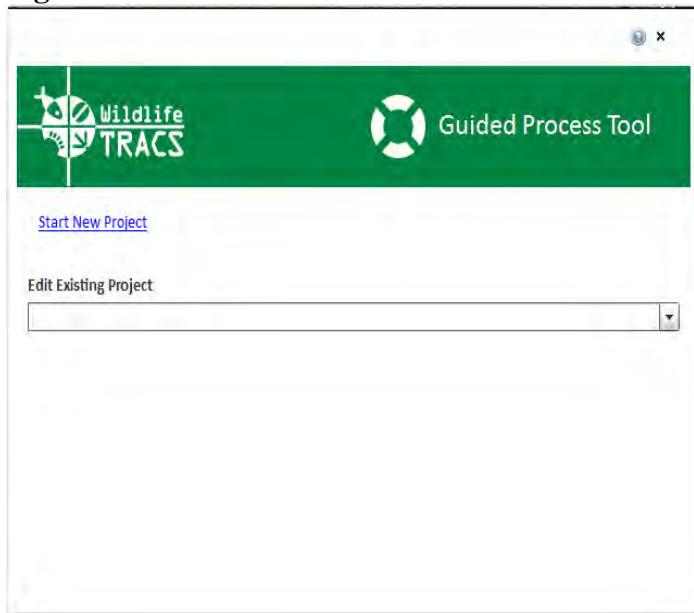
(Figure 1)

The Feature Editor is displayed on the mapper.

Step 2

- Select the project Freehand Polygon button.
- Draw the project boundary by holding down the left mouse button while drawing a shape. Release the left mouse button to complete the shape.

Figure 2
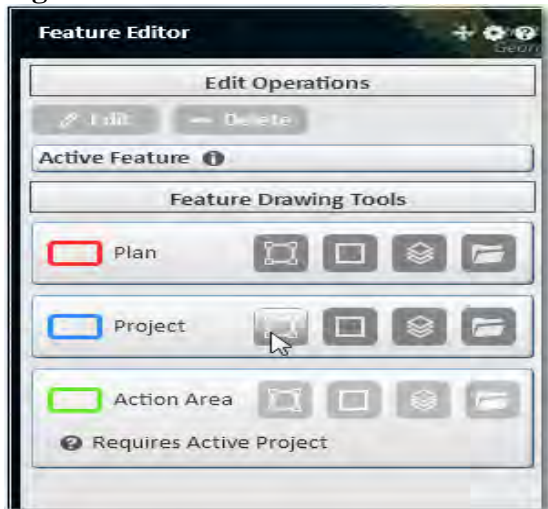
(Figure 2)

Note: The Project Polygon is displayed in blue.

Step 3

- Select the Save button located on the Feature Editor.

Figure 3
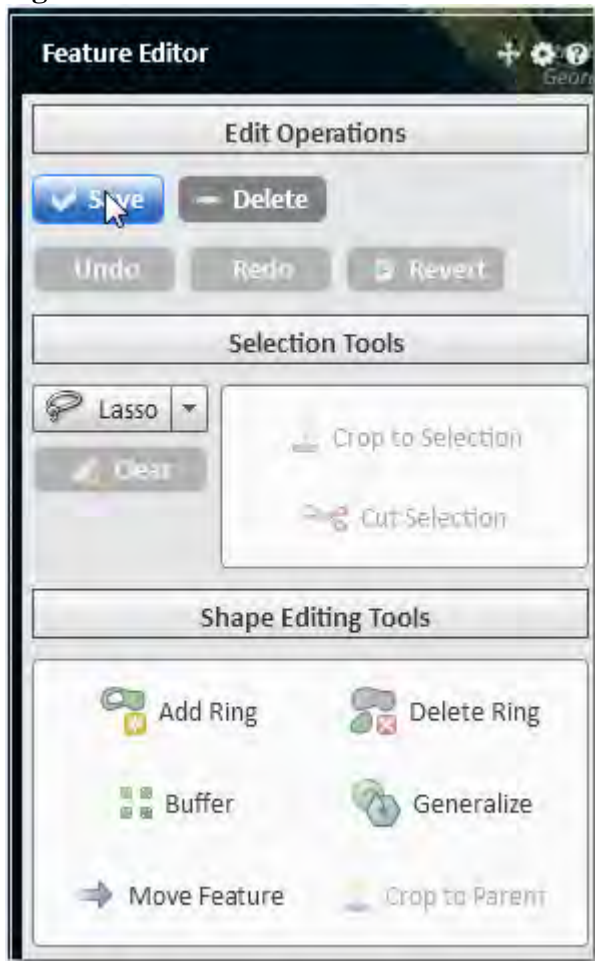
(Figure 3)

Note: The project is automatically assigned a system generated ID number.
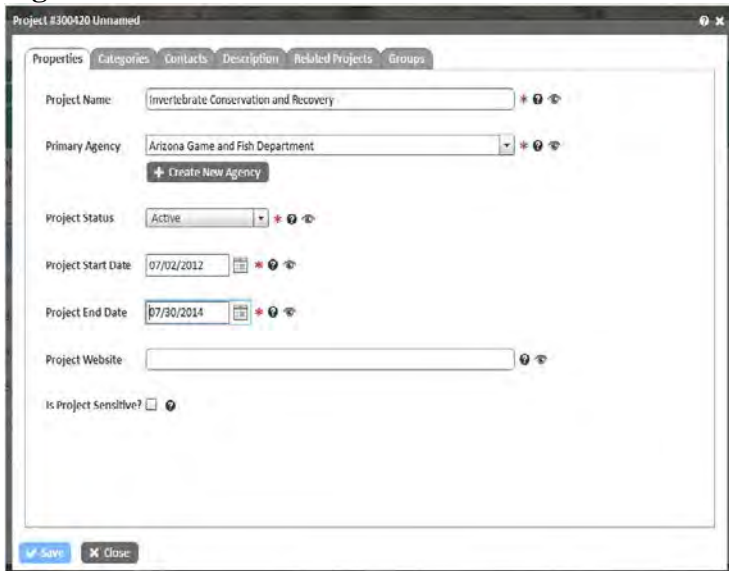
Project - Properties

Step 1

- Enter the Project Name (e.g. Invertebrate Conservation and Recovery).
- Select the Primary Agency from the drop down list by typing the first few letters of the agency name.
- Select the Project Status (e.g. Draft or Active)
- Select the Project Start and End Date.
- Enter the address of an external Project Website, if applicable.

Note: If the project is sensitive (i.e. related to a listed species, private landowner, or land acquisition), check the Project Sensitive checkbox. The spatial boundary of a sensitive project is automatically buffered.

Figure 1

(Figure 1)

Proceed to the Categories Tab.
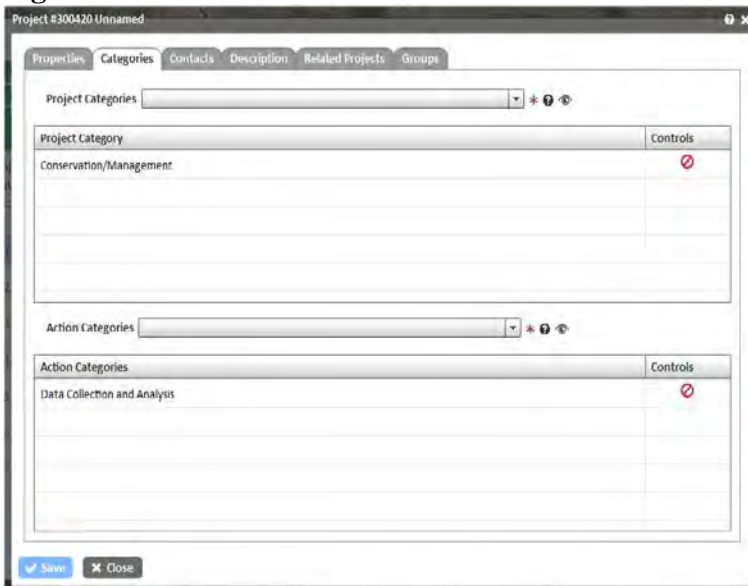
Note: The Save button is not activated until required data has been entered in the Projects, Categories, Contacts and Description tabs.

Project - Categories

Step 2

- Select one or more Project Categories from the drop down list (e.g. Conservation/Management).
- Select one or more Action Cateogories from the drop down list (e.g. Data Collection and Analysis). The Action Categories you select determine the objective and action types that can be created later.

Figure 2

(Figure 2)

Project - Contacts
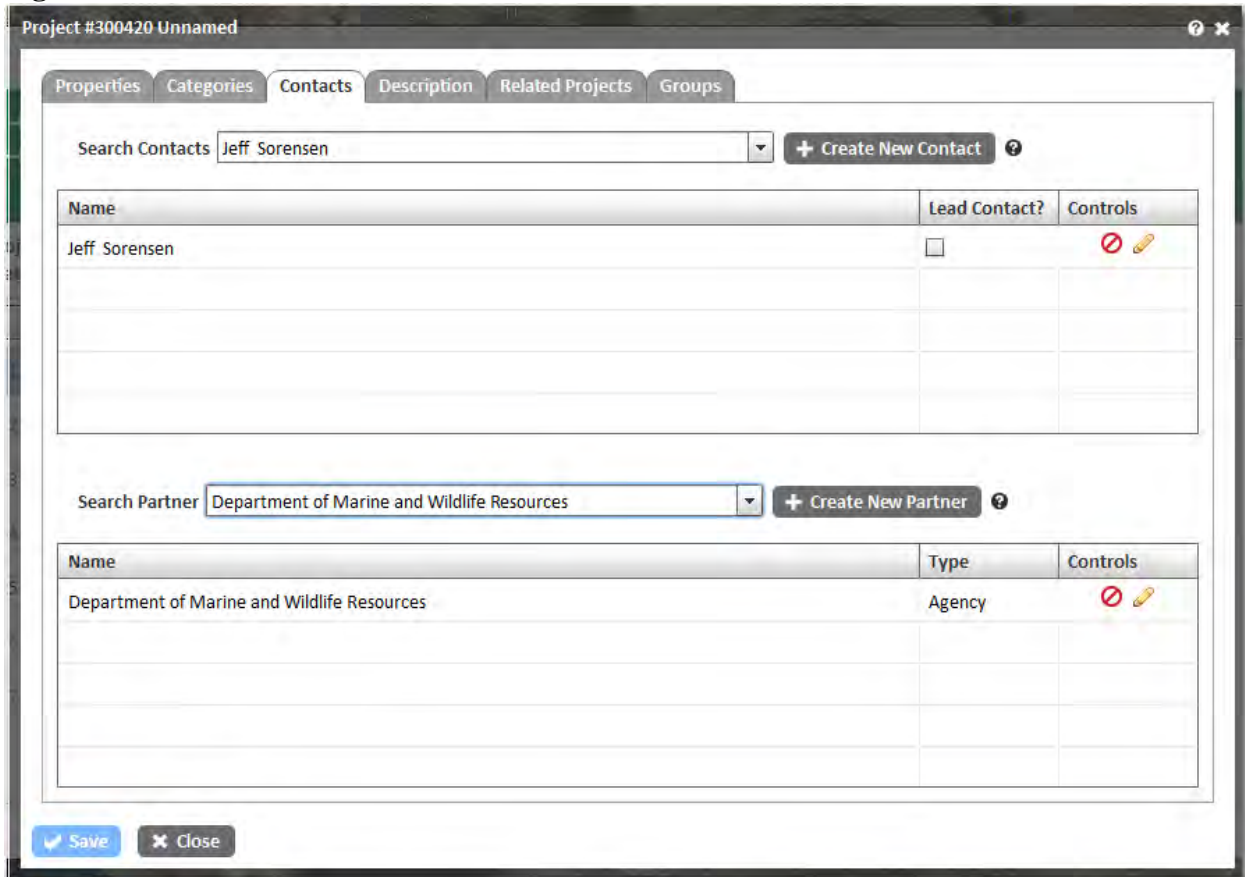
Step 3
- Select the Search Contacts drop down list (e.g. Jeff Sorensen).

Note: If no matches are found select the Create New Contact button. Refer to Create New Contact.

- Select the Search Partner drop down list i.e. Department of Marine and Wildlife Resources if applicable.

Note: If no mataches are found click the Create New Partner button. Refer to Create New Partner.
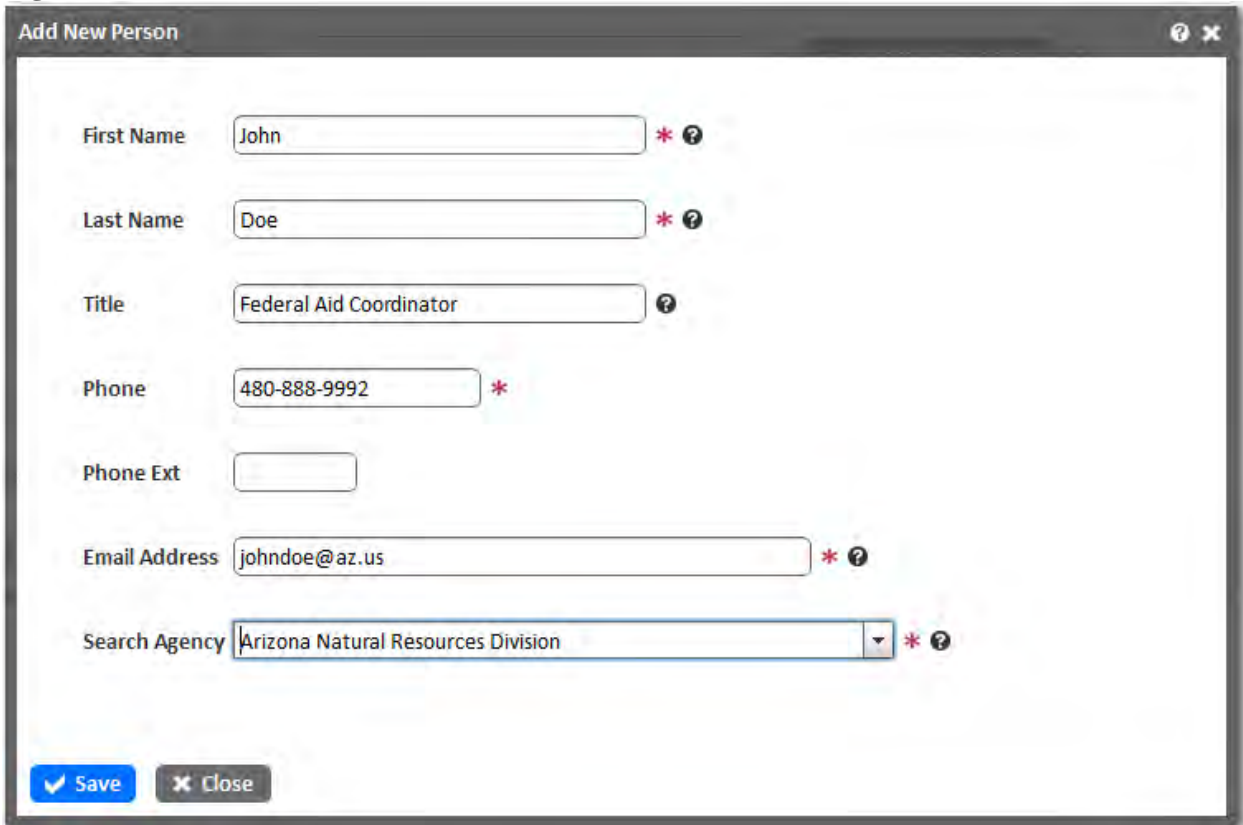
Figure 3

(Figure 3)

Project - Create New Contact

Step 4
- Enter First and Last Name, Title, and Email Address.
- Select the contact Agency from the drop down list.
- Select the Save button.

Figure 4

Add New Person

First Name	John	*
Last Name	Doe	*
Title	Federal Aid Coordinator	
Phone	480-888-9992	*
Phone Ext		
Email Address	johndoe@az.us	*
Search Agency	Arizona Natural Resources Division	*

Save   Close

(Figure 4)

Project - Partner Type

Step 5

- Select the Partner Type (e.g. Agency).

Figure 5

(Figure 5)

Step 6

- Select the Agency Type from the drop down list (e.g. Federal, State, Tribe).
- Select the Agency Name from drop down list (e.g. Arizona Mollusk Natural Resources).
- Enter Agency Abbreviation and Description (optional).
- Select the State and Parent Agency from the drop down list.
- Select the Save button.
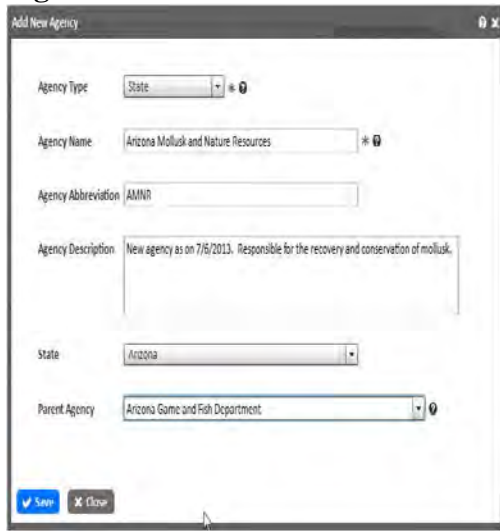
Figure 6

(Figure 6)

Project – Public Description

Step 1
- Enter or perform a copy and paste

Hint: Use the Ctrl+V to perform a copy and paste from another document source

Note: The information entered under the Public Description will be visible to the public and should be written as an abstract using common terms and language.

Figure 1
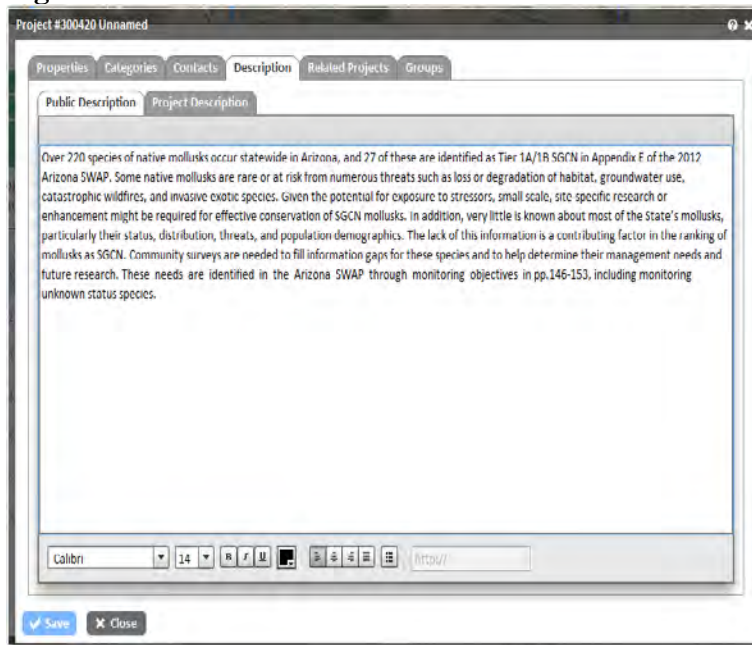
(Figure 1)

Step 2

- Enter or perform a copy and paste.

Hint: Use the Ctrl+V to perform a copy and paste from another document source.

- Select the Save button

Note: The Save button is now highlighted

Figure 2
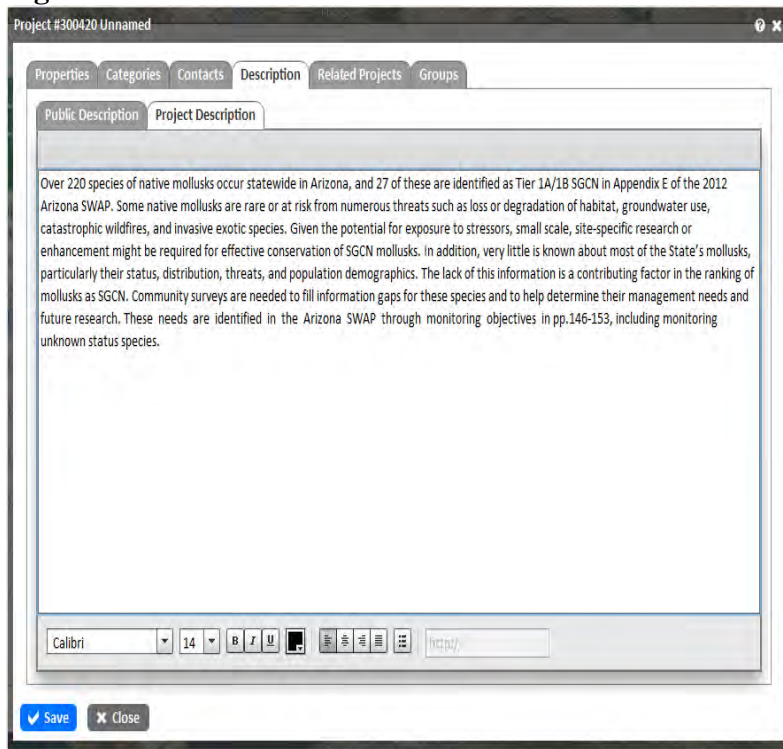
(Figure 2)

.

To associate the project to a Related Project, or to assign the project to a specific user Group, procced to Steps 3 & 4.

Project - Related Projects
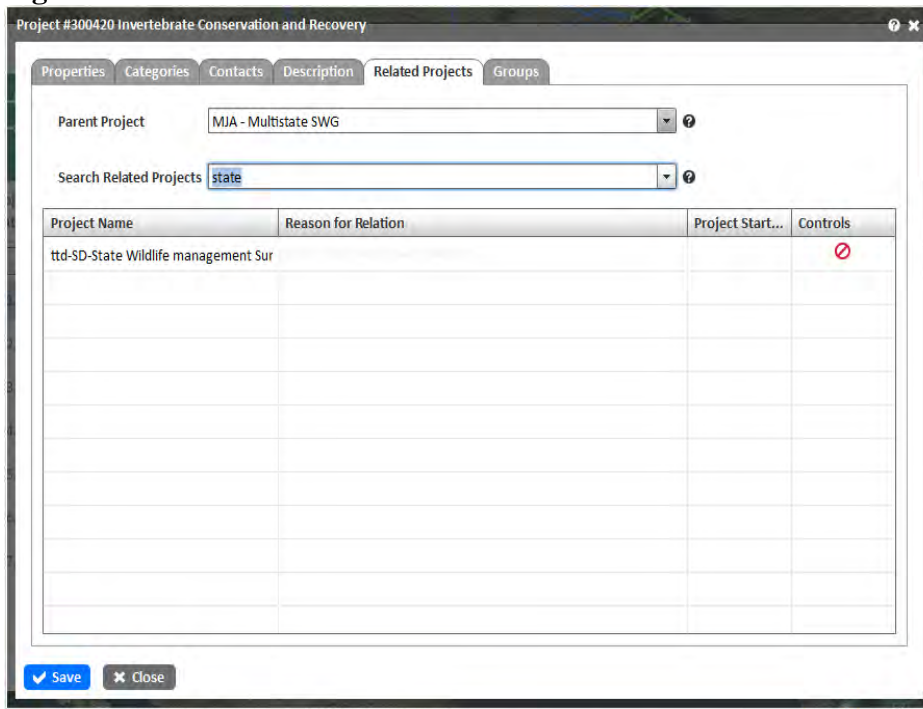
Step 4

- Select a Parent Project or search Related Projects from the drop down lists.

Note: The Reason for Relation and Project Start fields should describe the reason for creating a relationship between projects.

- Click the Save and Close buttons.

Figure 4

(Figure 4)

Project - Groups

Step 5

- Select a Project Group from the drop down menu.

Note: The Project Group list only contains the groups to which you have edit permission in TRACS. If you only participate in a single group, no other options will be available.

- Select the Save button.

Figure 5
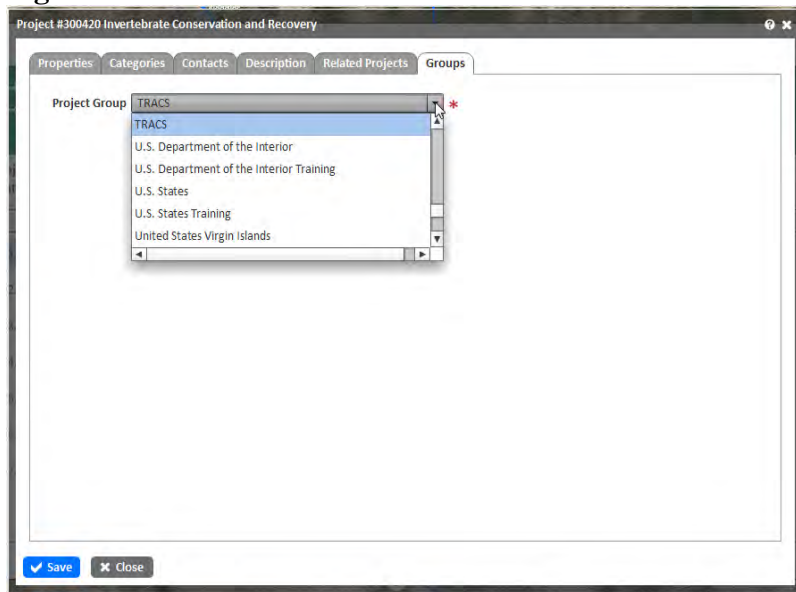
(Figure 5)

Step 6
- Select the OK button on the confirmation dialogue box.
- Select the Save and Close buttons to close the project form.

Figure 6
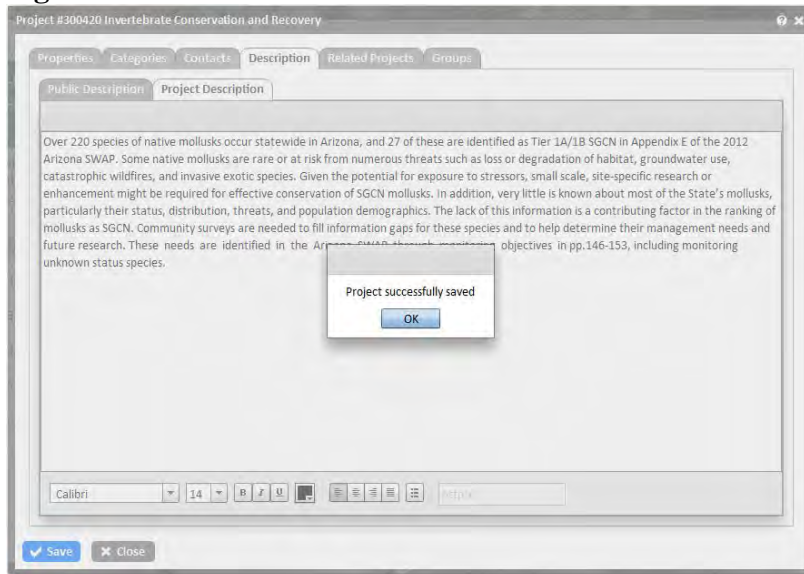
(Figure 6)

You will be directed back to the Guided Process Tool.
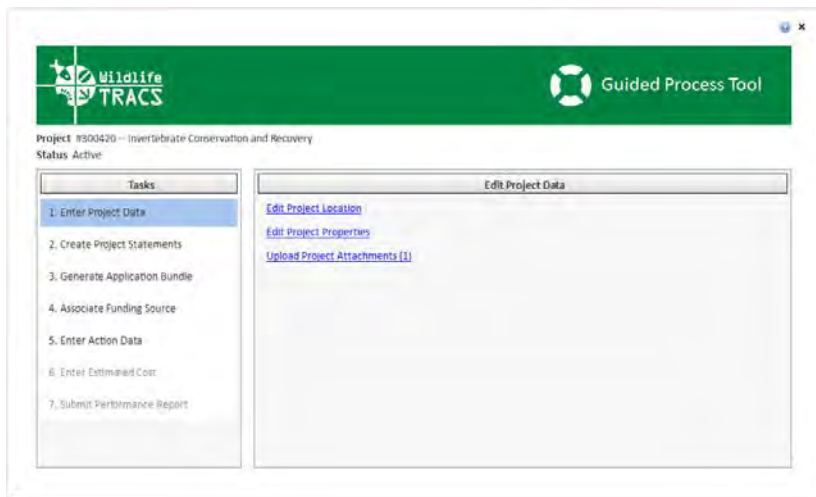
Project - Attachments

Step 1
- Click the Enter Project Data link located in the Tasks panel.
- Select the Upload Project Attachment link located on the Edit Project Data panel.
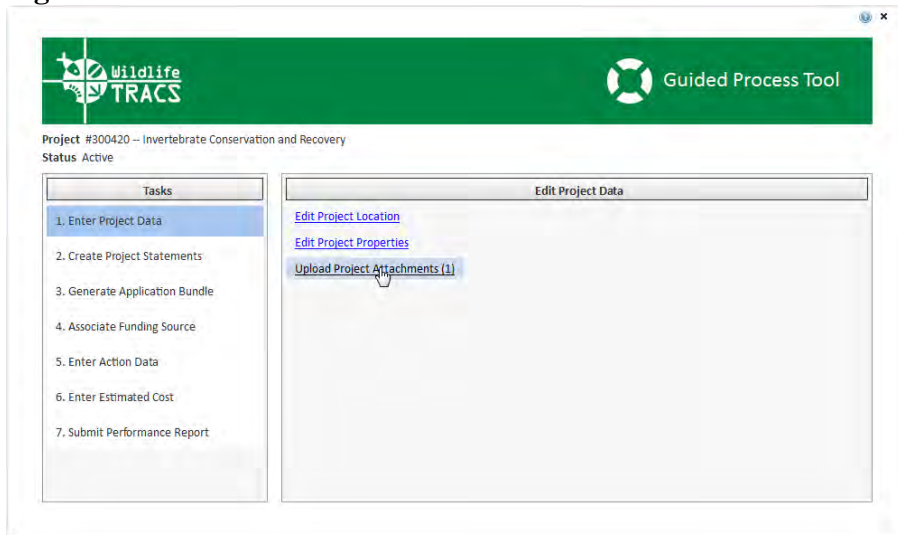
Figure 1

(Figure 1)

Step 2

- Click the Add Attachment button.

Figure 2
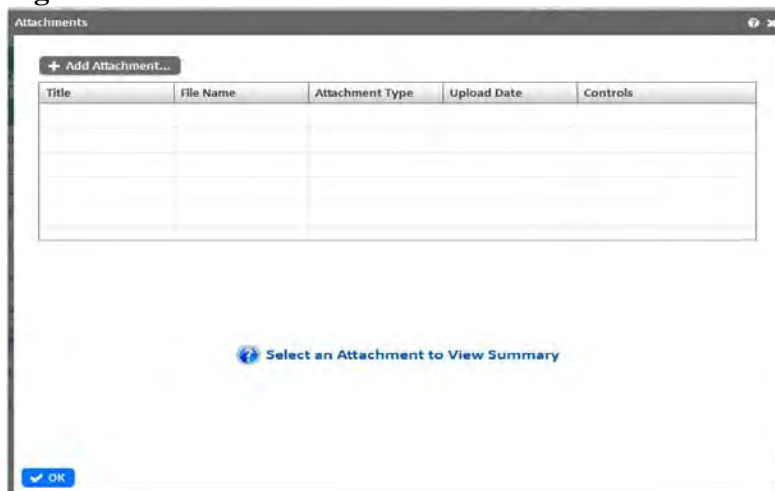
(Figure 2)
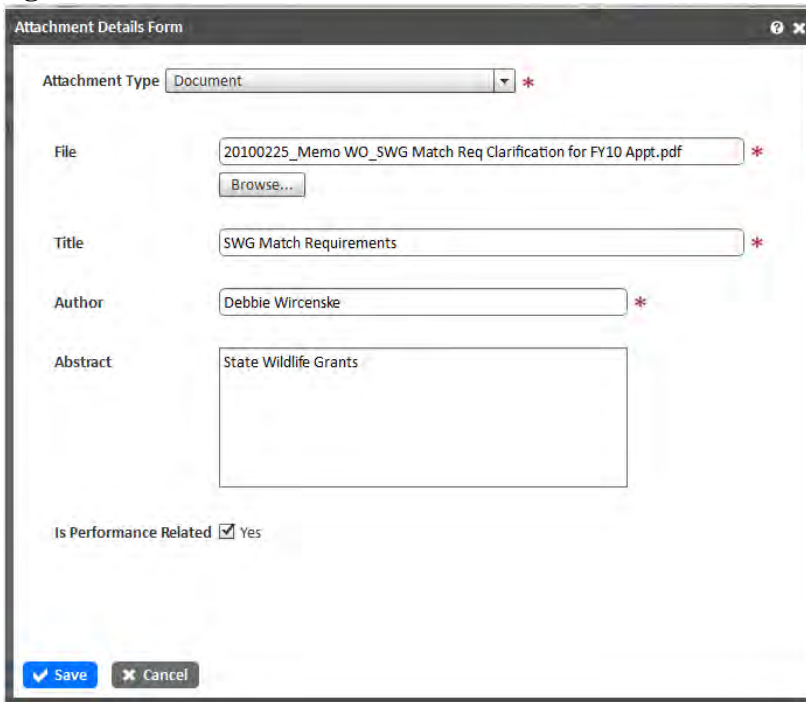
Step 3

- Select the Attachment type (e.g. document, map, photo, video).
- Click the Browse button to locate the local source file.
- Enter the Title, Author and Abstract.

Note: If the attachment should be included in performance reports as a link, check the Performance Related checkbox.

- Click the Save button.

Figure 3

(Figure 3)

The document is successfully uploaded when it appears in the list of attachments.

Select the OK button to close the form.

Create Project Statements

Step 1

- Click the Create Project Statements link located in the Guided Process Tool Tasks panel.
- Click the Create New Project Statement button located in the Create Project Statements panel.
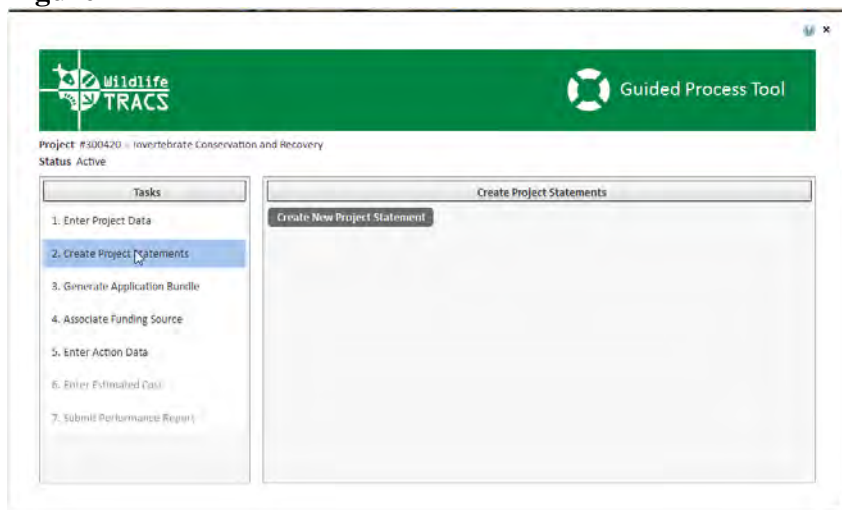
Figure 1

(Figure 1)

The Project Statement form will be displayed.

Project Statement - Properties

Step 1

- Enter the Name of the project statement.
- Select the Principal Investigator from the drop down list by typing the first few letters of the investigator's name.

Note: If no matches are found select the Create New Contact button. Refer to Create New Contact.
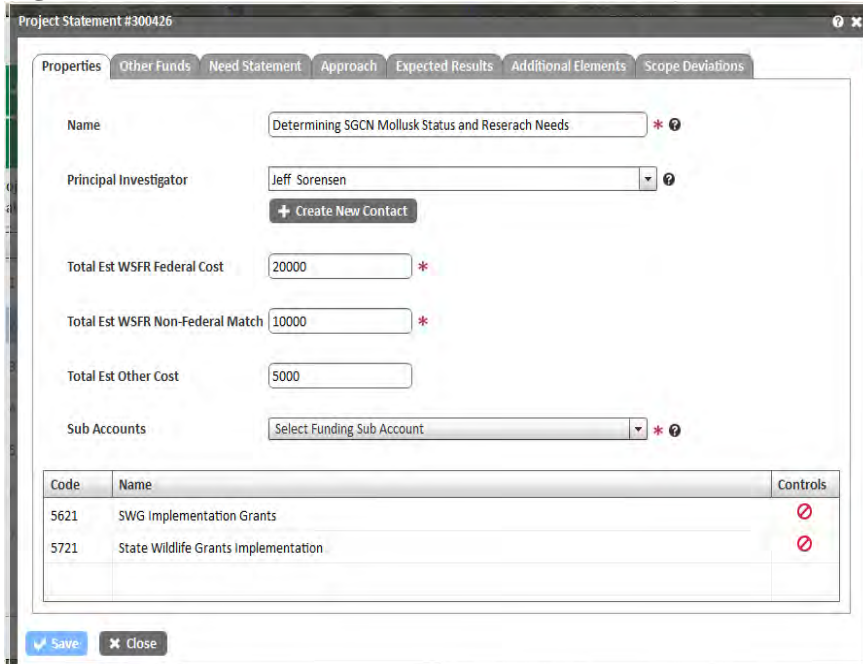
- Enter the Est WSFR Federal Cost, Non-WSFR Cost and Other Cost.

Note: Total Est Other Cost includes funds received from Partners.

- Select the Sub-Accounts from the drop down menu.

Note: ALL RELATED SUB ACCOUNTS MUST BE ENTERED. State users will not be able to update this information once an award is associated with the project statement.

Figure 1

(Figure 1)
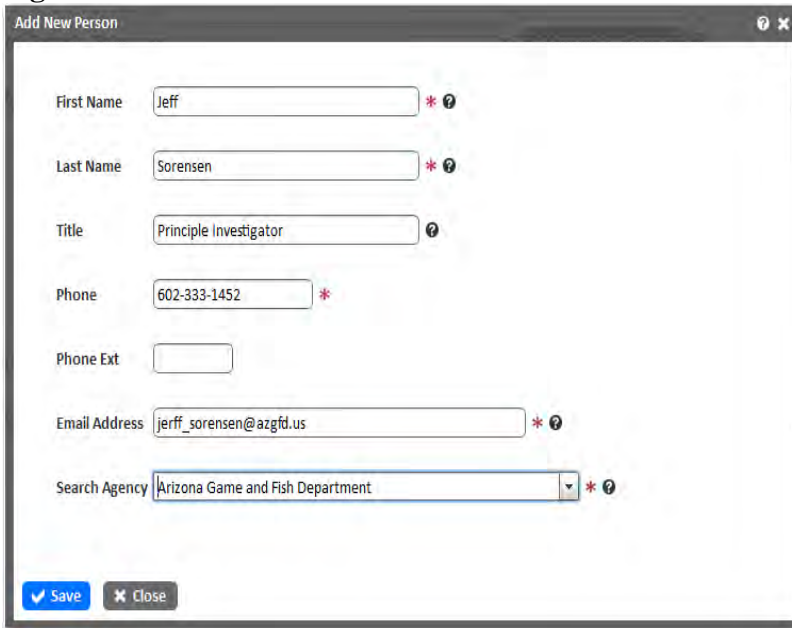
Note: The Save button is not active until required data is entered under the Properties, Other Funds, Need Statement, Approach, Expected Results.

Project Statement - Create New Contact

Step 1

- Enter the contact First and Last Name.
- Enter the Title, Phone, and E-Mail Address.
- Select an agency from the Search Agency drop down list by typing the first three letters of the agency name (e.g. Arizona Game and Fish Department).
- Click the Save button.

Figure 1
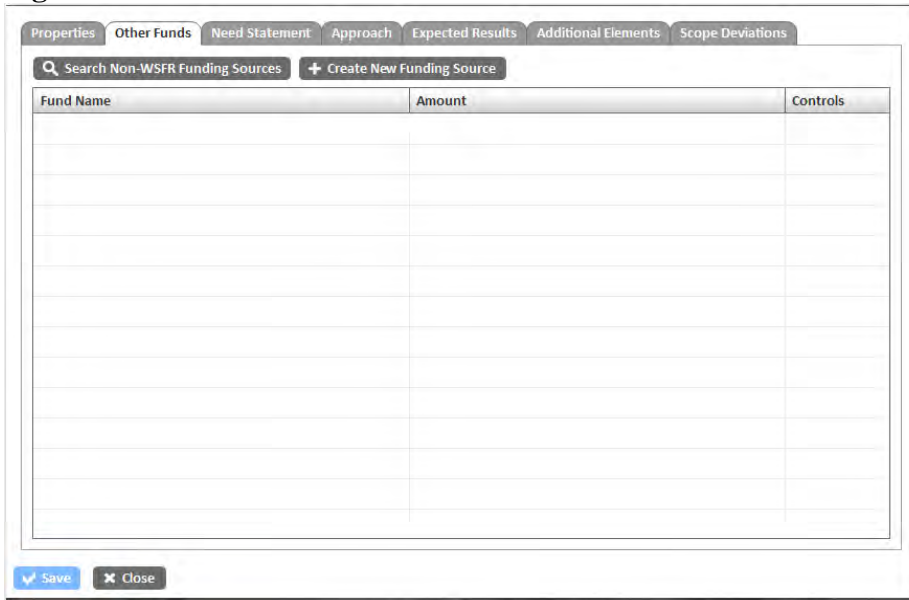
(Figure 1)

Project Statement - Other Funding Source

Step 1
- Click the Search Non-WSFR Funding Sources button.
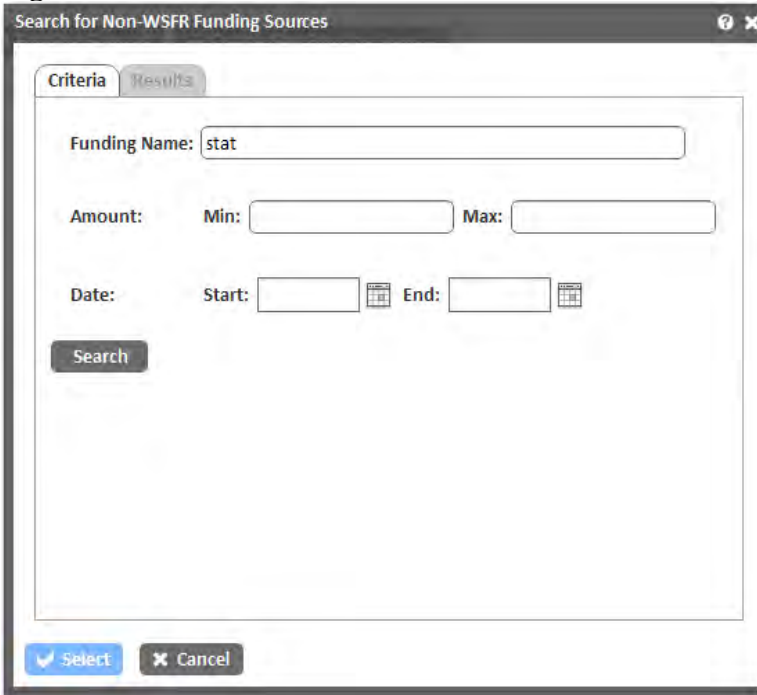
Figure 1

(Figure 1)

The Search for Non-WSFR Funding Sources form will be displayed.

Step 2
- Enter the funding source Name.
- Enter the funding source Amount.
- Enter a Start and End Date.
- Click the Search button to search for the funding source.

Figure 2

(Figure 2)
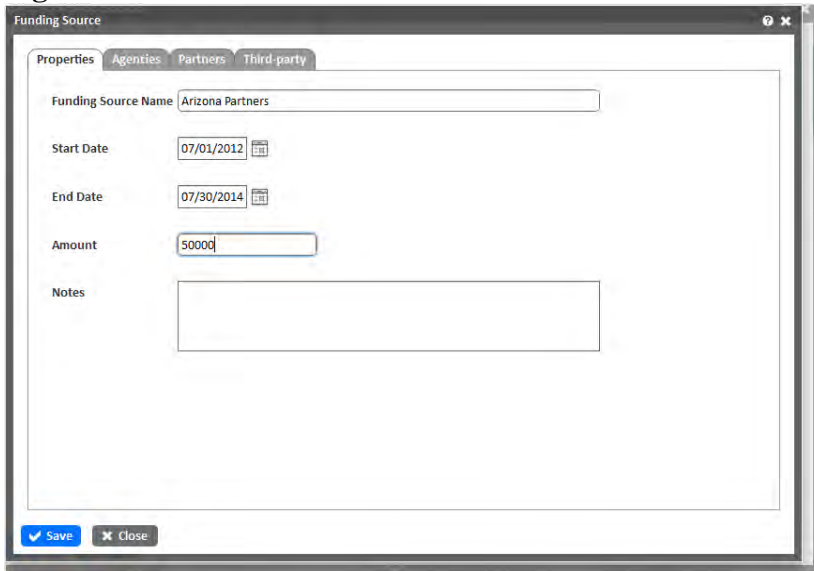
Create New Other Funding Source

Step 1
- Enter the Funding Source Name (e.g. Arizona Partners).
- Enter the Start Date and End Date.
- Enter the Amount and applicable Notes.
- Click the Save button to save the funding source.

Note: Enter Agencies, Partners, or Third-parties associated with the funding source if applicable; otherwise, click the Close button to close the New Funding Source form.

Figure 1

(Figure 1)

Other Funding Source - Agencies

Step 2

- Select an Agency from the drop down list by typing the first three letters of the agency name (e.g. Arizona Mollusk and Nature Resources).

Note: If no matches are found, click the Create New Agency button. Refer to Create New Agency.

- Click the Save button to save the Other Funding Source.
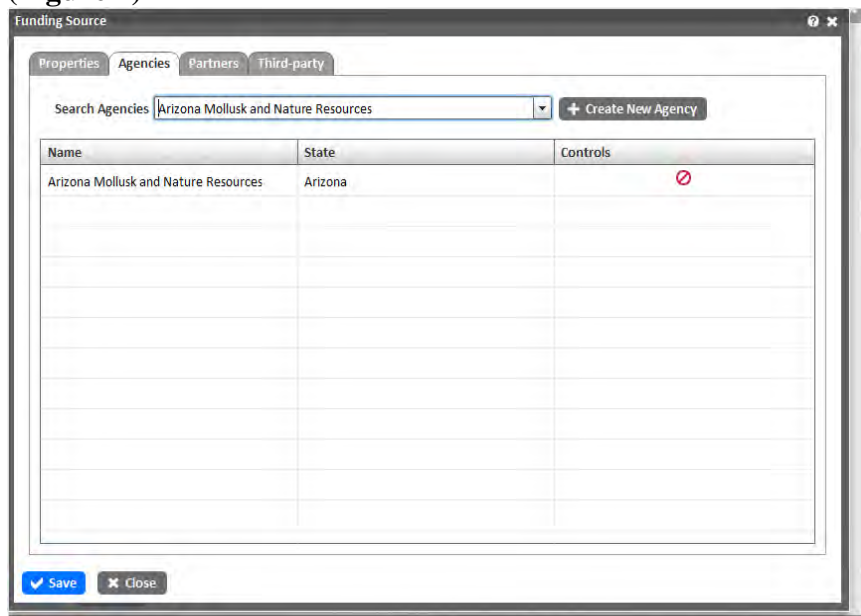
(Figure 2)

(Figure 2)

Other Funding Source - Partners

Step 3

- Select a Partner from the drop down menu by typing the first three letters of the partner name (e.g. Arizona Mollusk and Nature Resources).

Note: If no matches are found, click the Create New Partner button. Refer to Create New Partners.

- Click the Save button to save the Other Funding Source.

Figure 3

(Figure 3)

Step 4

- Select a Third Party from the drop down menu by typing the first three letters of the third party name (e.g. Maritime Administration).

Note: If no matches are found, click the Create New Third Party button. Refer to Create New Third Party.

- Click the Save button to save the Other Funding Source.

Figure 4
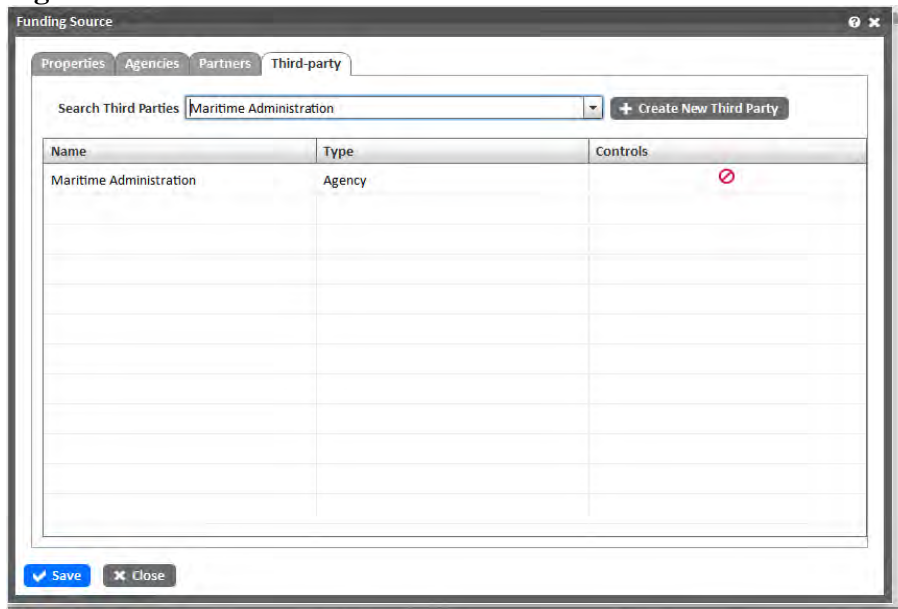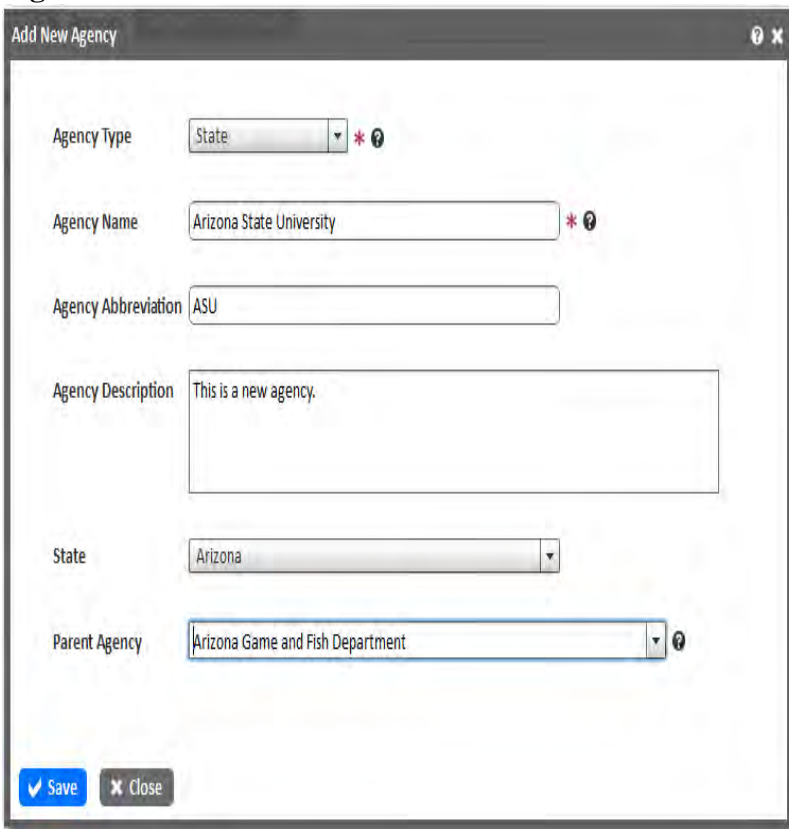
(Figure 4)

Other Funding Source - Creating a New Agency

Step 1

- Select the Agency Type from the drop down list (e.g. Federal, State, Tribal).
- Enter the Agency Name, Agency Abbreviation, and Agency Description.
- Select the State and Parent Agency from the drop down lists.
- Click the Save button to save the new Agency record.

Figure 1

(Figure 1)

Step 2
- Click the OK button to save the Other Funding Source.
- Click the Close button to close the Other Funding Source form.

Figure 2
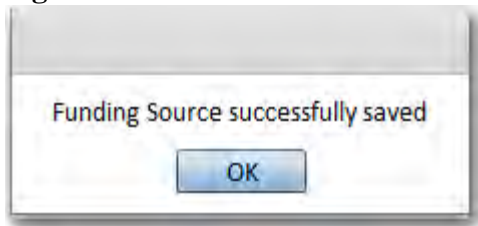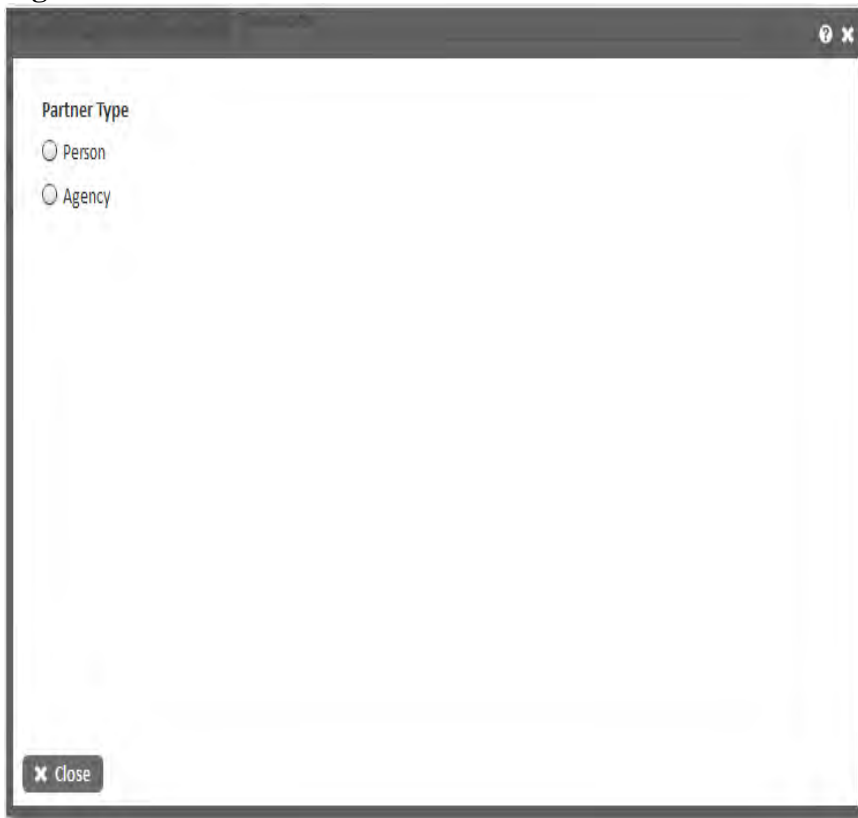
(Figure 2)

Other Funding Source - Partner

Step 1

- Choose a Partner type.

Figure 1
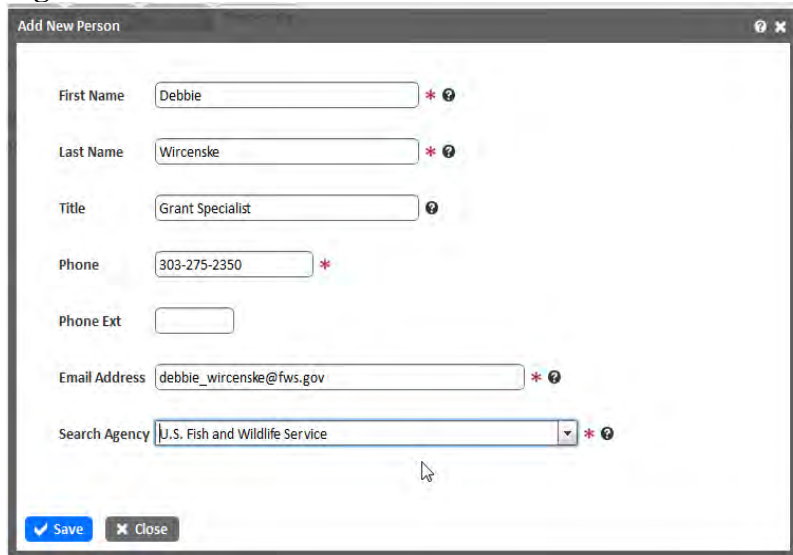
Partner Type
- ○ Person
- ○ Agency

✕ Close

(Figure 1)

Step 2

- Enter the partner First and Last Name.
- Enter the Title, Phone and E-Mail Address.
- Select an agency from the Search Agency drop down list by typing the first three letters of the Agency name (e.g. U.S. Fish and Wildlife Service).
- Click the Save button to save the new Partner.

Figure 2

(Figure 2)

Step 3

- Click the OK button to save the Other Funding Source.
- Click the Close button to close the Other Funding Source form.
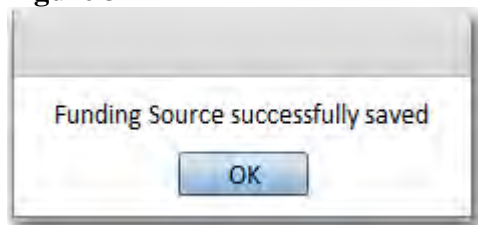
Figure 3

(Figure 3)

Other Funding Source - Third-Party

Step 1
- Choose the Partner Type.

Figure 1
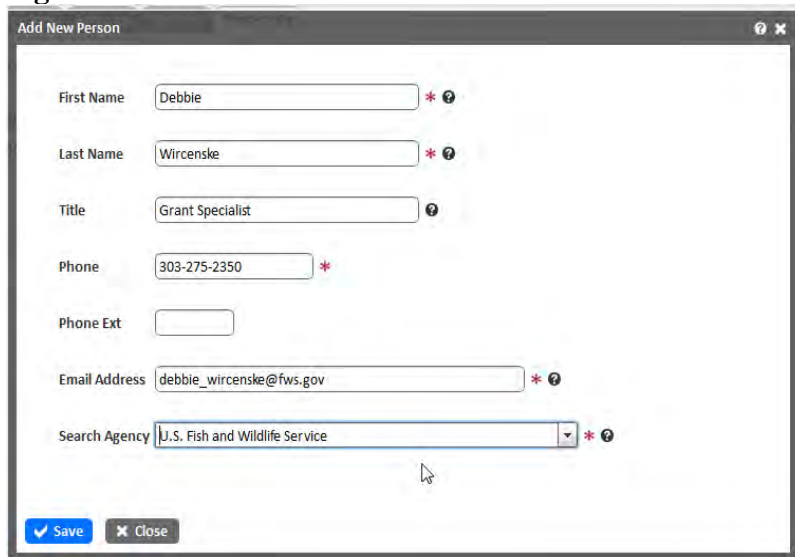
(Figure 1)

Step 2
- Enter the third party First and Last Name.
- Enter the third party Title, Phone and E-Mail Address.
- Select an agency from the Search Agency drop down list by typing the first three letters of the agency name (e.g. U.S. Fish and Wildlife Service).
- Click the Save button to save the new Third Party.

Figure 2

(Figure 2)

Step 3

- Click the OK button to save the Other Funding Source.
- Click the Close button to close the Other Funding Source form.
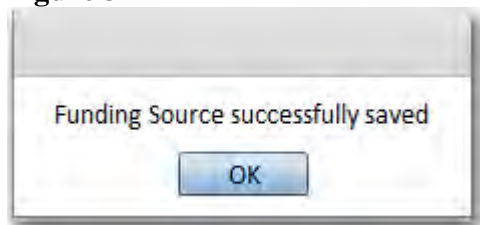
Figure 3

(Figure 3)

Project Statement - Need Statement

Step 1

- Enter the Need Statement.

Hint: You can use Ctrl+V to cut and paste from other source documents. The Description field will accept unlimited characters.
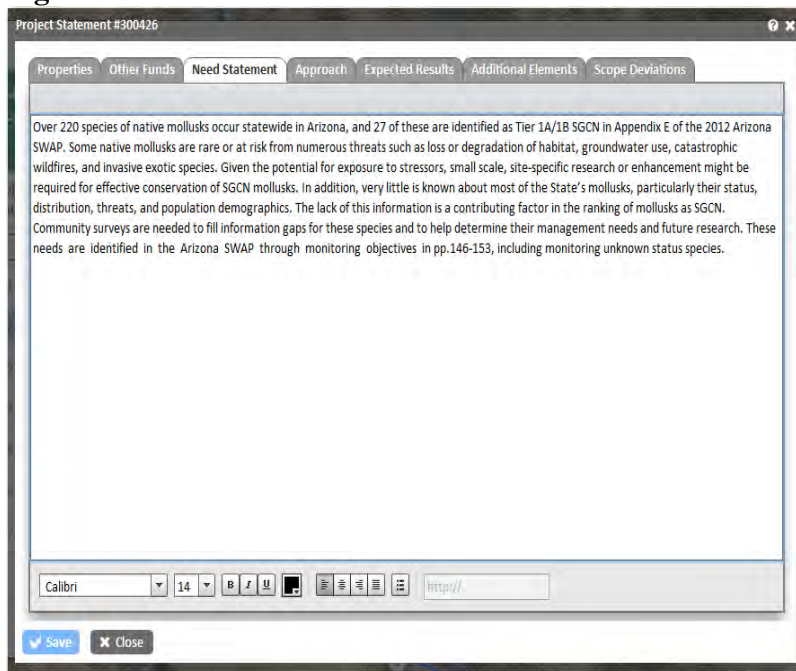
Figure 1

(Figure 1)

Proceed to the Approach tab.

Project Statement - Approach

Step 1
- Enter the Approach.

Hint: You can use Ctrl+V to cut and paste from other source documents. The Description field will accept unlimited characters.
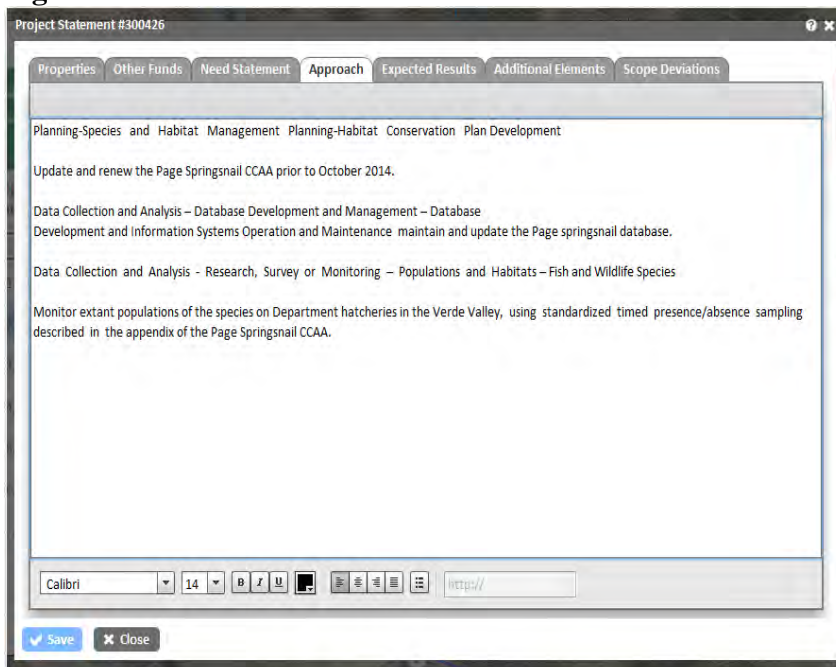
Figure 1

(Figure 1)

Project Statement - Expected Results

Step 1
- Enter the Expected Results.

Hint: You can use Ctrl+V to cut and paste from other source documents. The Description field will accept unlimited characters.

- Click the Save button to save the Project Statement.

Note: The Save button is activated once all of the required fields have been filled in.

Note: If the Additional Elements and Scope Deviation tabs are not applicable, click the Close button.
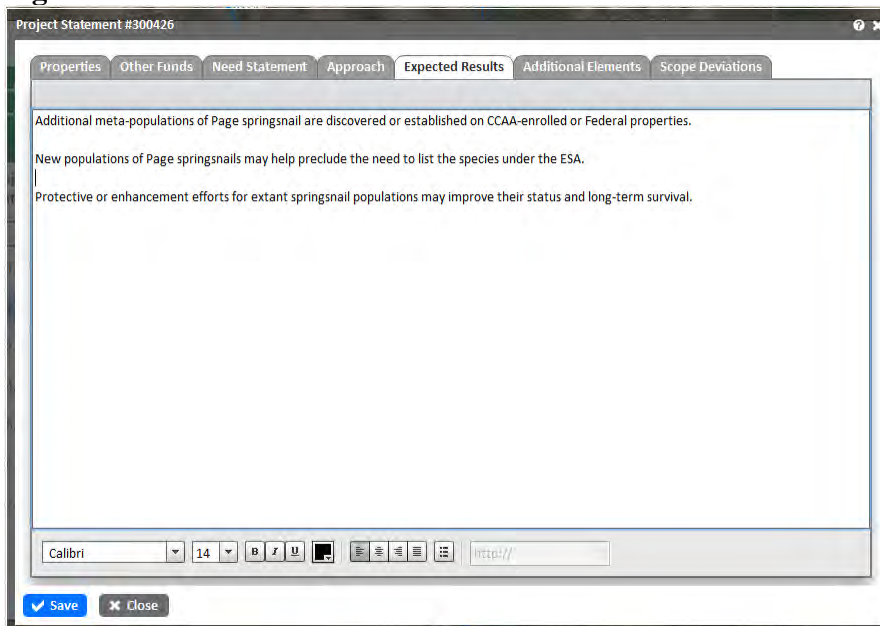
Figure 1

(Figure 1)

Project Statement - Additional Elements
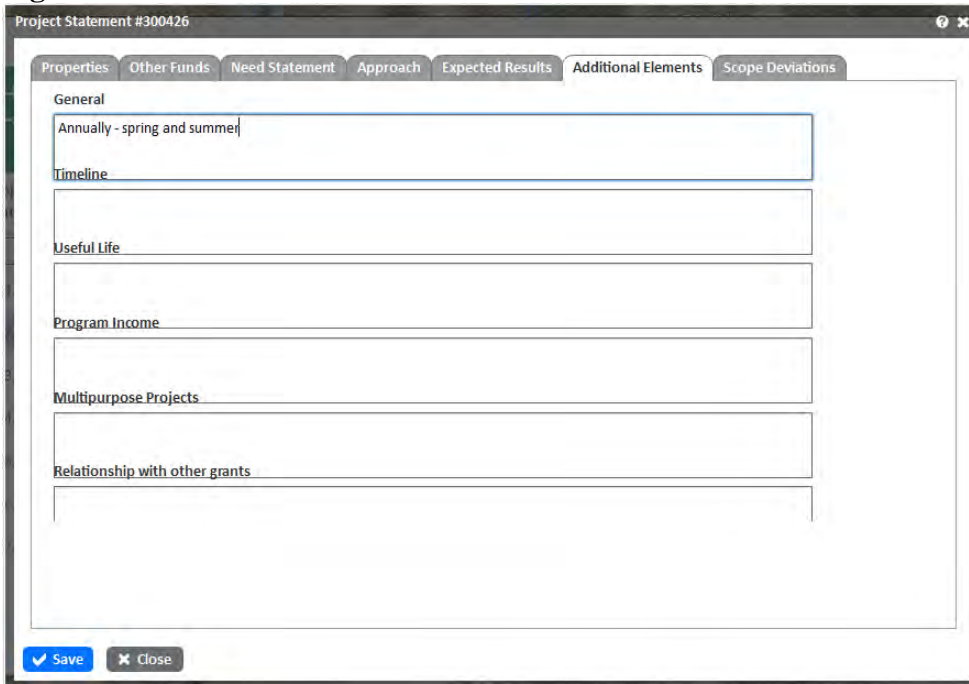
Step 1
- Enter information into the additional element fields as applicable.

Hint: You can use Ctrl+V to cut and paste from other source documents. The Description field will accept unlimited characters.

- Select the Save and OK button to save the Project Statement.

Note: If the Scope Deviations tab is not applicable, click the Close button.

Figure 1

(Figure 1)

Project Statement - Scope Deviations

Step 1
- Enter the Scope Deviation if applicable.

Hint: You can use Ctrl+V to cut and paste from other source documents. The Description field will accept unlimited characters.

- Click the Save and OK button to save the Project Statement.
- Click the Close button to close the Project Statement form.

Figure 1
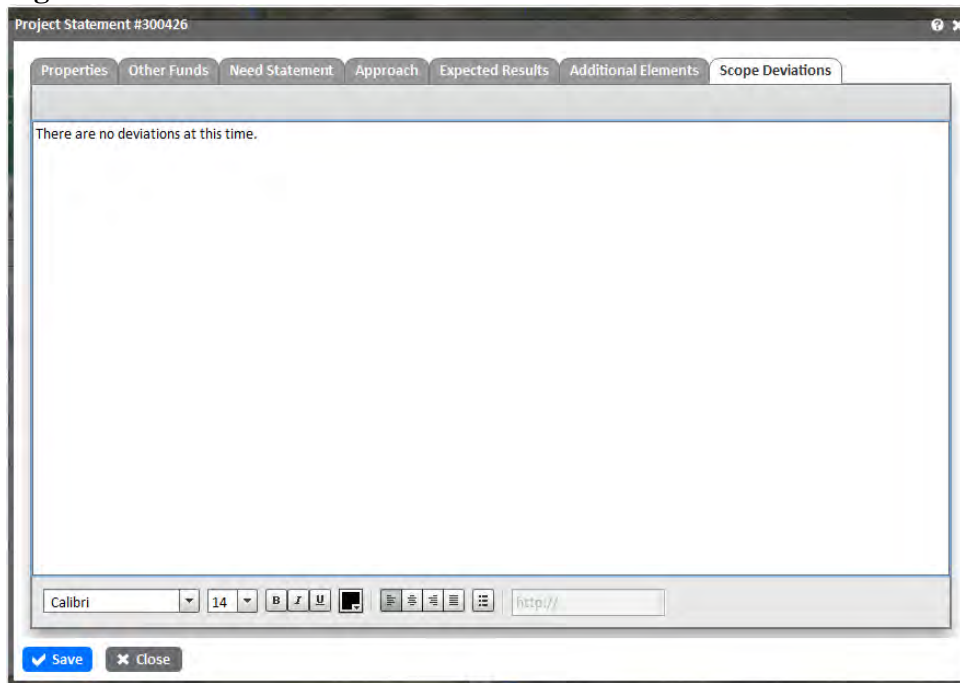
(Figure 1)

Project Statement - Objectives

Step 1
- Click the Create Project Statements link located in the Guided Process Tool tasks panel.
- Click the Edit Statement Objectives button located in the Create Project Statements panel
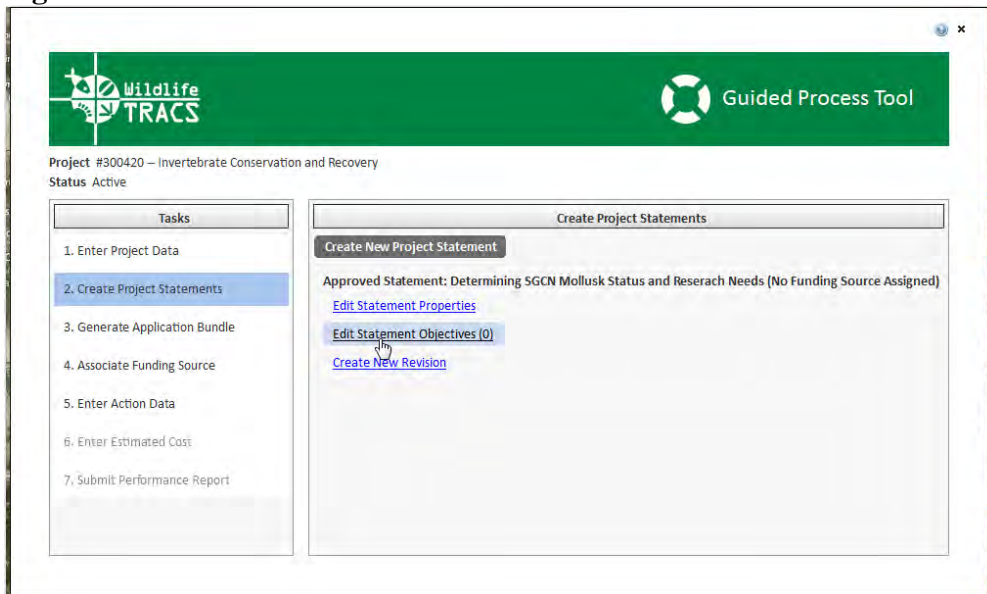
Figure 1

(Figure 1)

Step 2
- Click the Create SMART Objectives button.

Figure 2
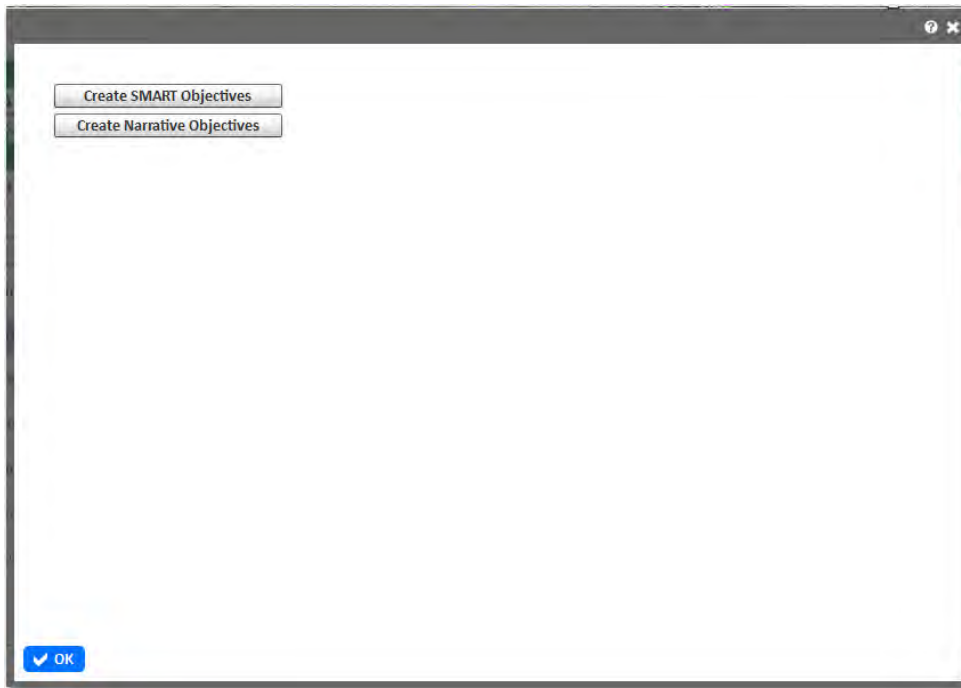
(Figure 2)

Step 3

- Click the New Need/Threat button.
- Select a Level 1 and 2 Need/Threat type from the drop down list.

Note: Level 3 is optional.

- Enter the Need/Threat Description field

Hint: You can use Ctrl+V to cut and paste from other source documents. The Description field will accept unlimited characters.

Note: Entry of the Need/Threat Description fields activates the Save button.

- Select the Save button
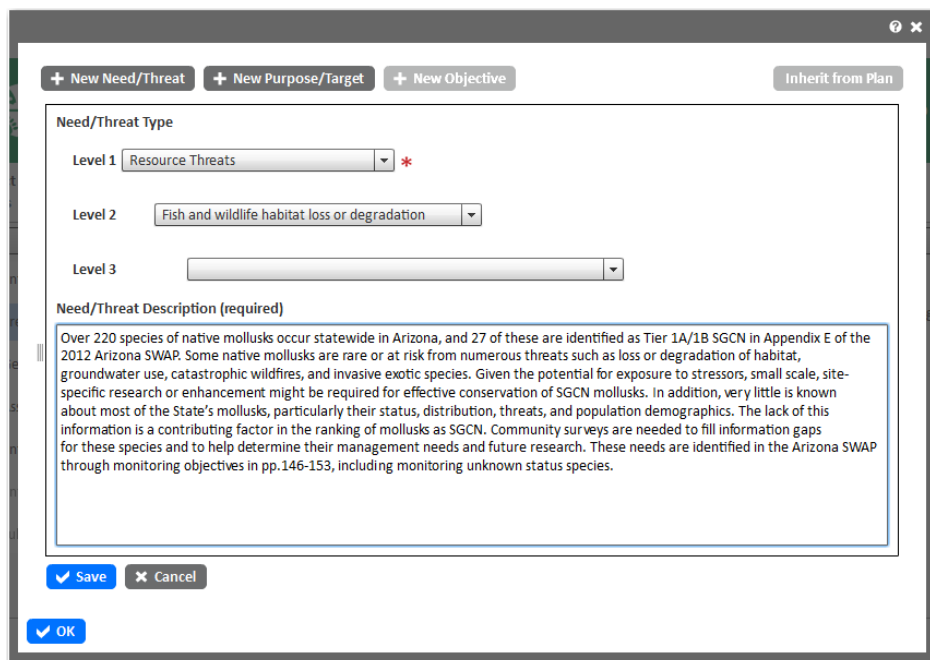
Figure 3

(Figure 3)

Step 4

- Expand the project statement tree in the left panel by clicking the plus sign.
- Click the newly created Need/Threat in the left panel.

Figure 4
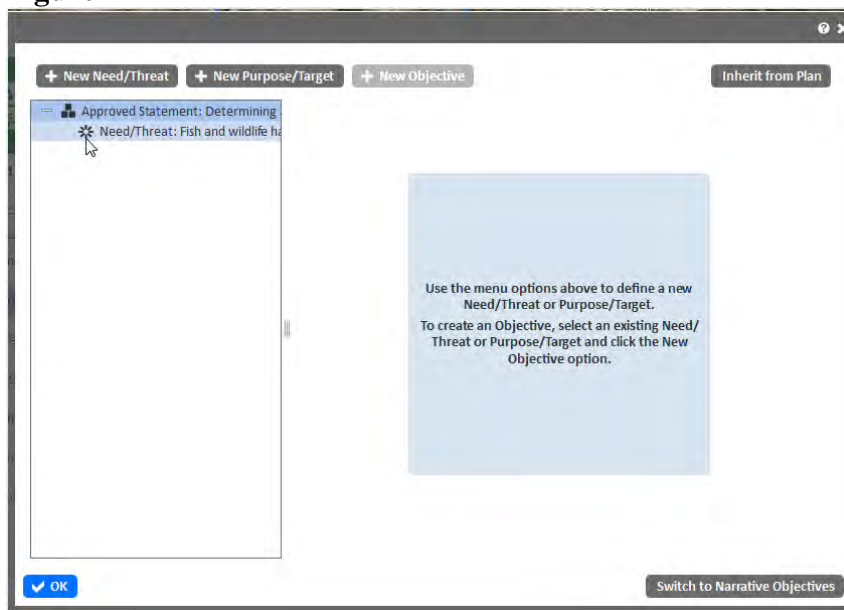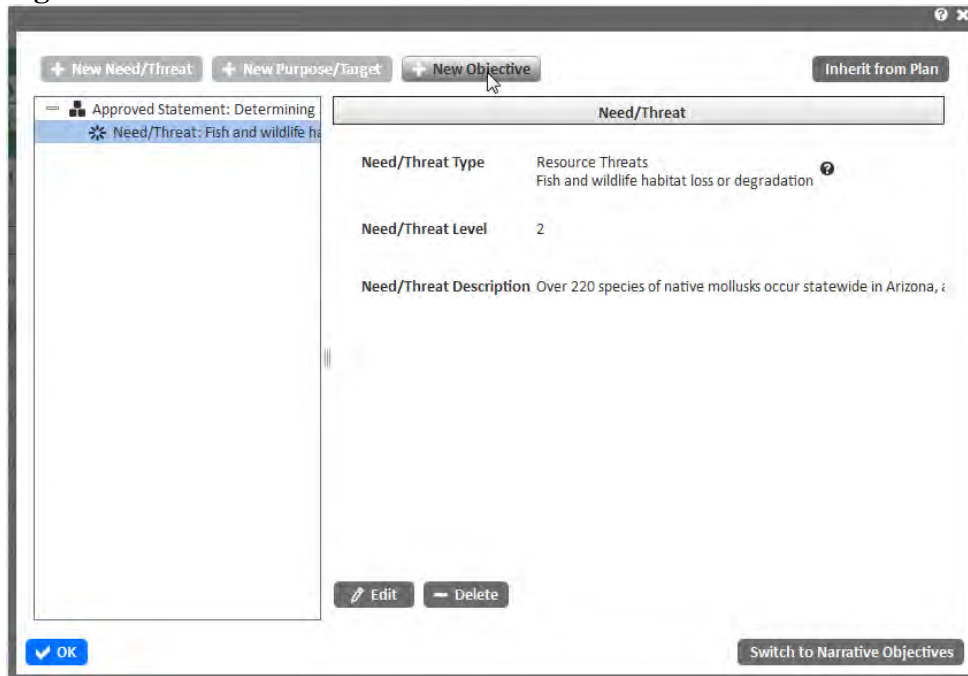
(Figure 4)

Step 5

- Click the New Objective button at the top of the form.

Hint: To inherit objectives from a Plan (optional), click the Inherit from Plan button. Refer to Inherit from Plan.

Figure 5

(Figure 5)

Step 6

- Enter the Objective ID, Name, and Description.

Hint: You can use Ctrl+V to cut and paste from other source documents. The Description field will accept unlimited characters.

Figure 6

(Figure 6)

Step 7

- Click the Quantitative Indicators or Qualitative Indicators tab.

Note: In this example, Quantitative Indicator has been selected. Refer to Qualitative Indicators.

- Click the New Standard Indicator button.

Figure 7

(Figure 7)
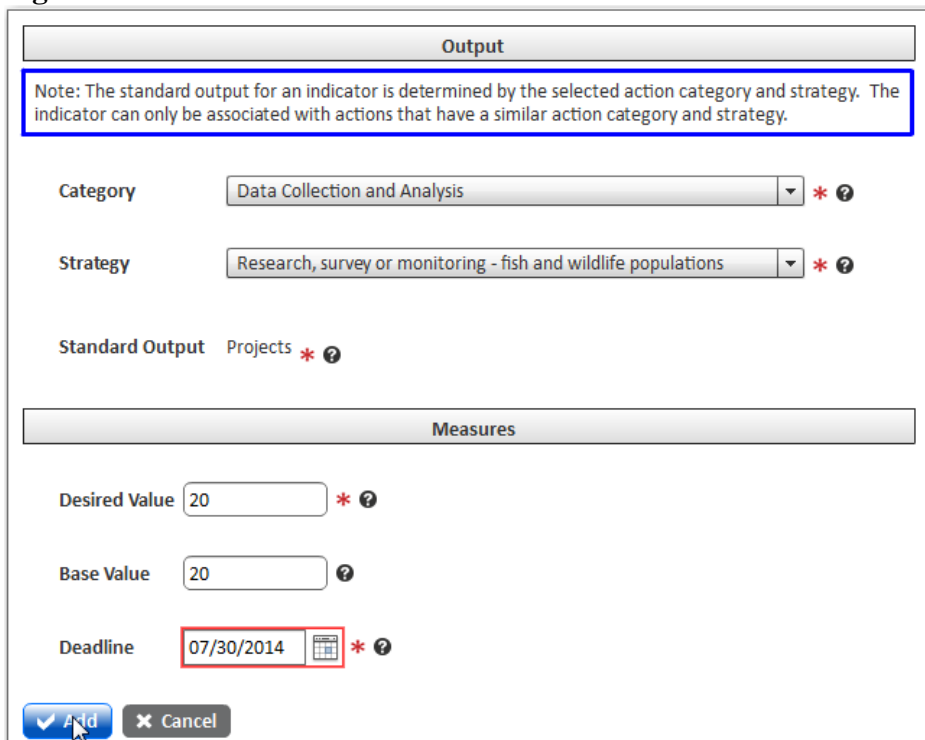
Step 8

- Select a Category from the drop down list.
- Select a Strategy from the drop down list.

Note: The Standard Output for an indicator is automatically determined by the selected strategy.

- Enter the Desired Value and Base Value.
- Enter the Deadline date.
- Click the Add button to add the indicator to the objective.

Figure 8

(Figure 8)

The indicator table has been added when it appears in the grid.

Step 9

- Click the Save button to save the objective.
- Click the OK button to close the objective form.

Figure 9
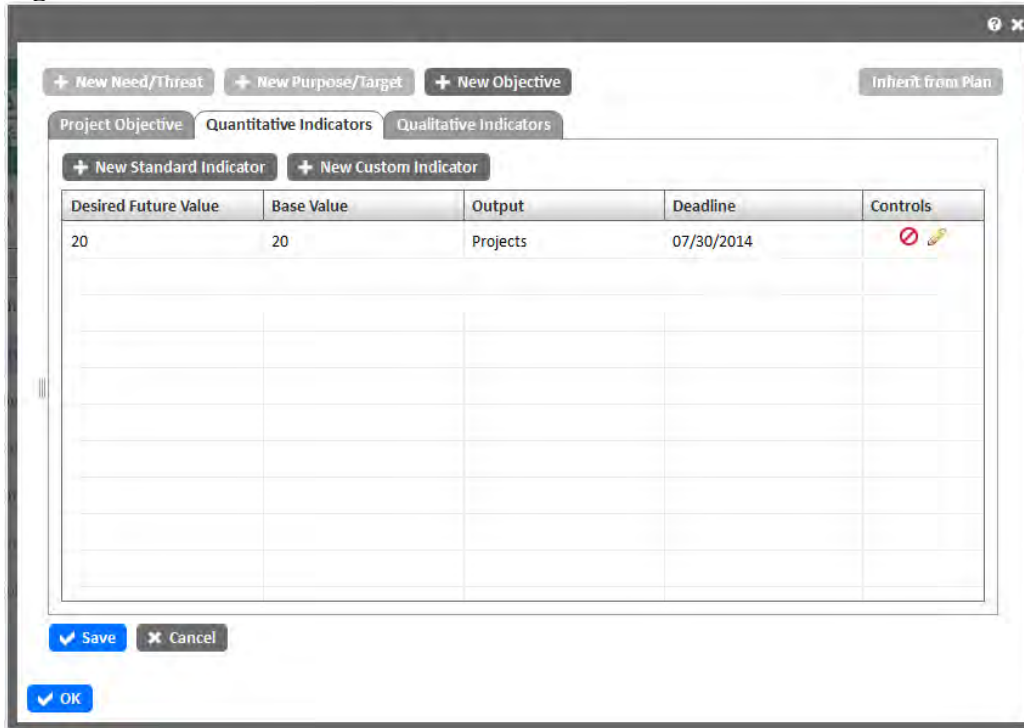
(Figure 9)

Objectives - Inherit from Plan

Step 1

- Click the Inherit from Plan button locate at the top right of the Objectives form.
- Select a Plan from the drop down list by typing the first three letters of the plan name.
- Plan objectives will be displayed in the right panel.
- Drag and drop a Need/Threat, Purpose/Target, or Objective to the appropriate tree node in the left frame.

Note: You can inherit an entire Need/Threat or Purpose/Target and its Objectives, or an individual Objective within a Need/Threat or Purpose/Target. The inherited item must be dragged and dropped onto the name of the item to which it will be added in the left frame.

Figure 1
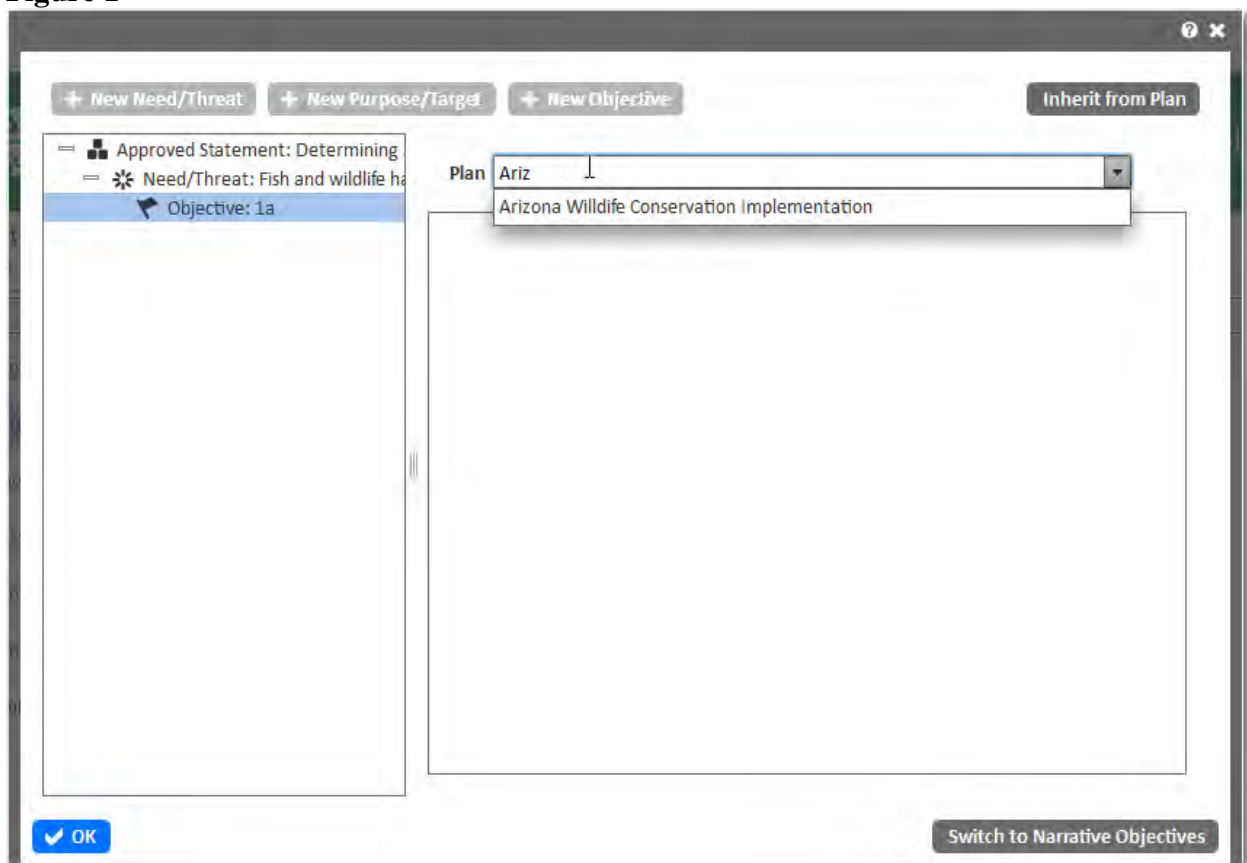
(Figure 1)

A Need/Threat, Purpose/Target, or Objective has been inherited when it appears in the left frame with the inherited symbol.
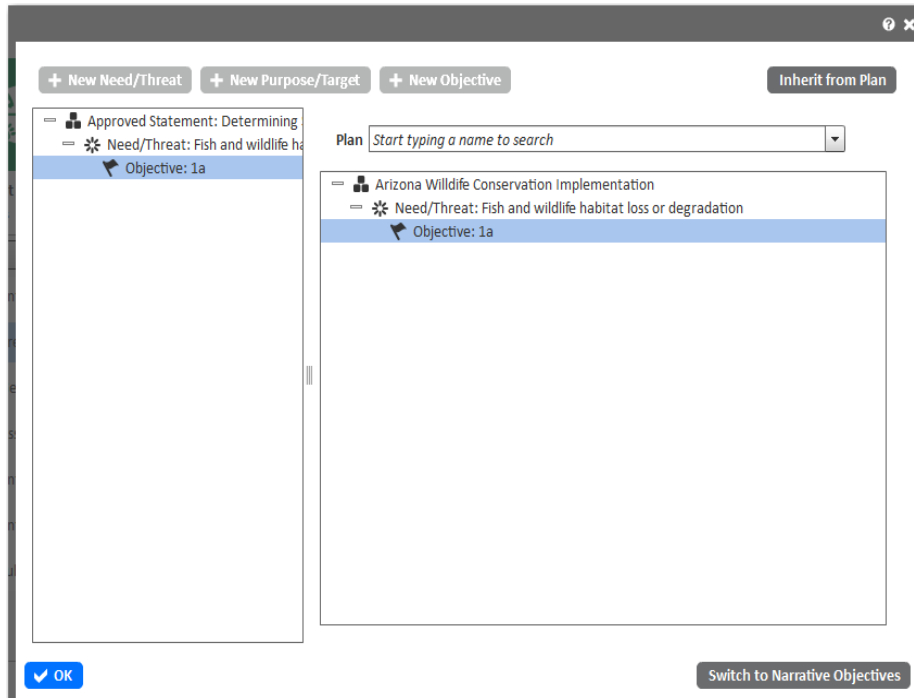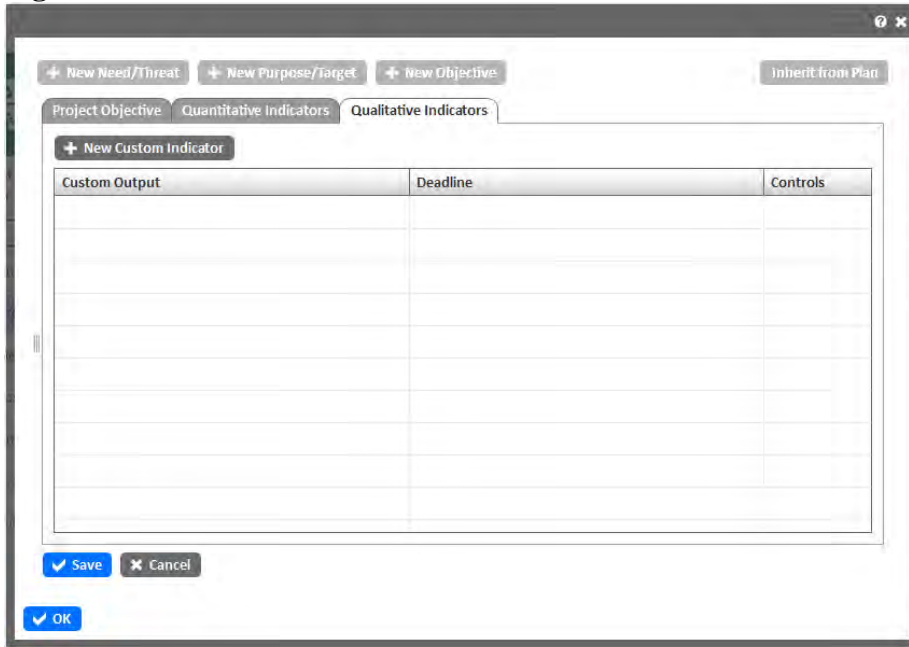
Objectives - Qualitative Indicators

Step 1
- Click the Qualitative Indicator tab on the Objective form.
- Click the New Custom Indicator button.

Figure 1

(Figure 1)

Step 2
- Enter the Custom Output for the indicator.
- Enter the Deadline date.
- Click the Add button.

Figure 2
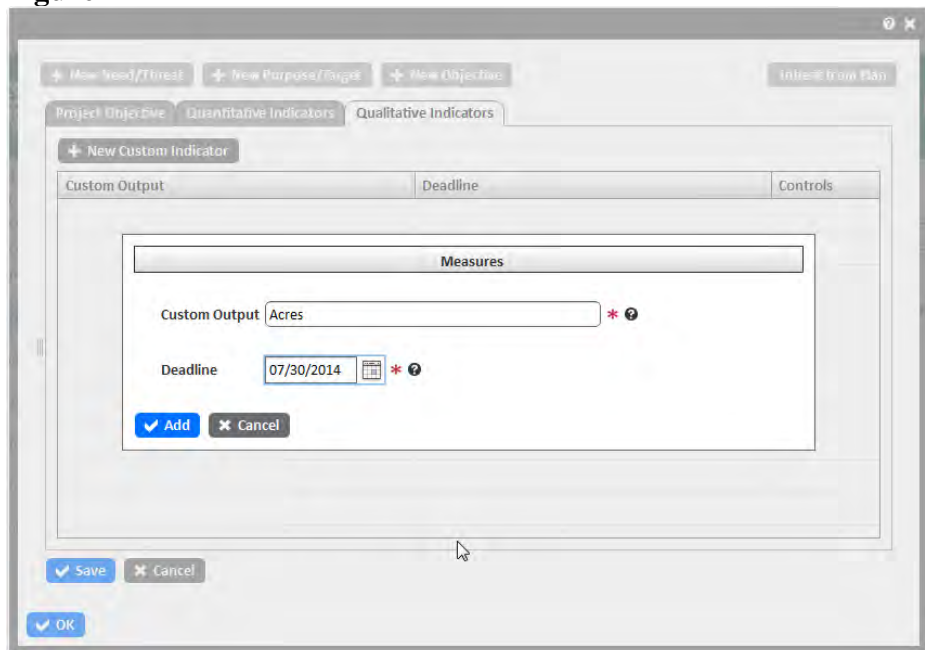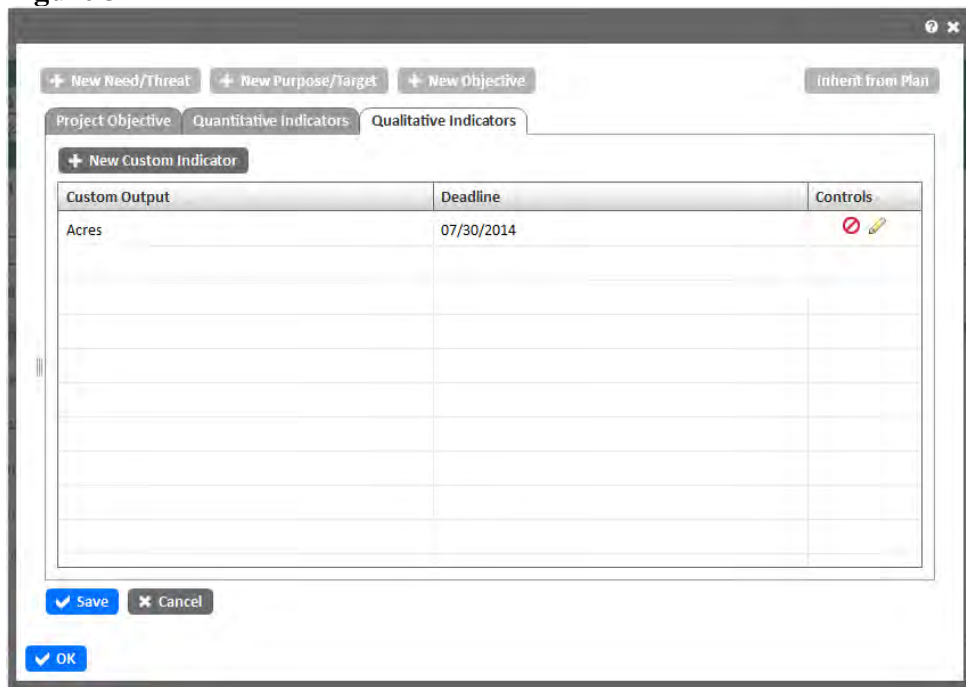
(Figure 2)

The Qualitative Indicator is added to the grid.

Step 3
- Click the Save button to save the Indicator and Objective.
- Click the OK button to close the Objective form.

Figure 3
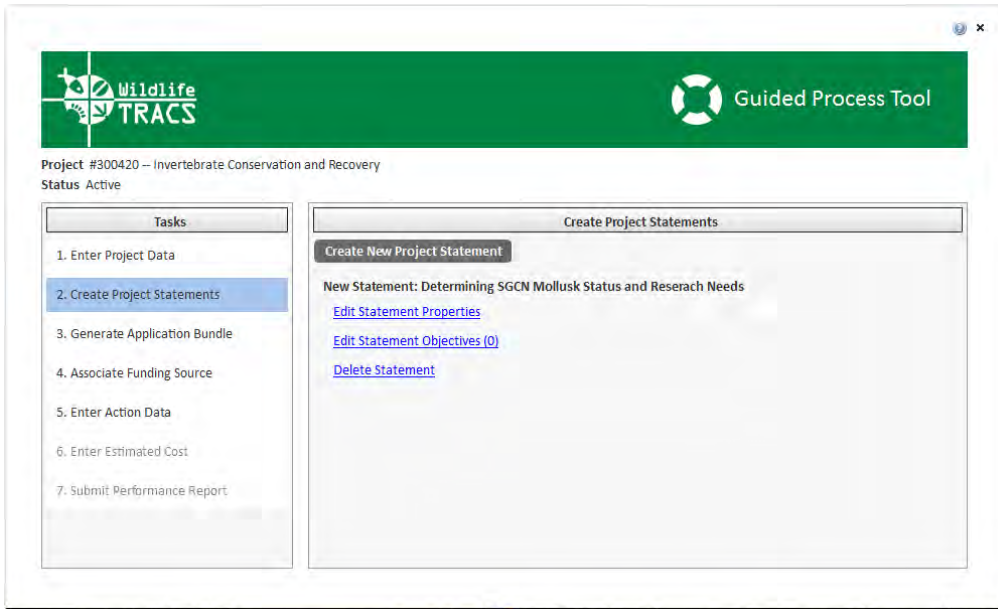
(Figure 3)

Project Statement - Editing

You can edit any component of the Project Statements prior to approval by clicking the Edit Statement Properties link or the Edit Statement Objectives link located under the Create Project Statements panel.

Project Statement - Deleting

You can delete a Project Statement prior to approval by clicking the Delete Statement link located under the Create Project Statements panel.
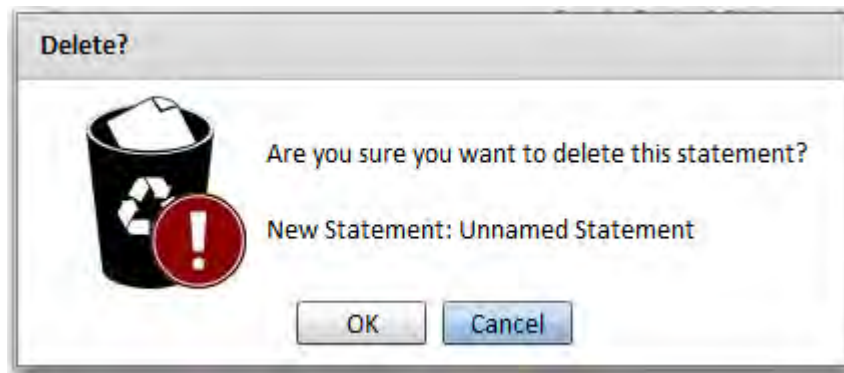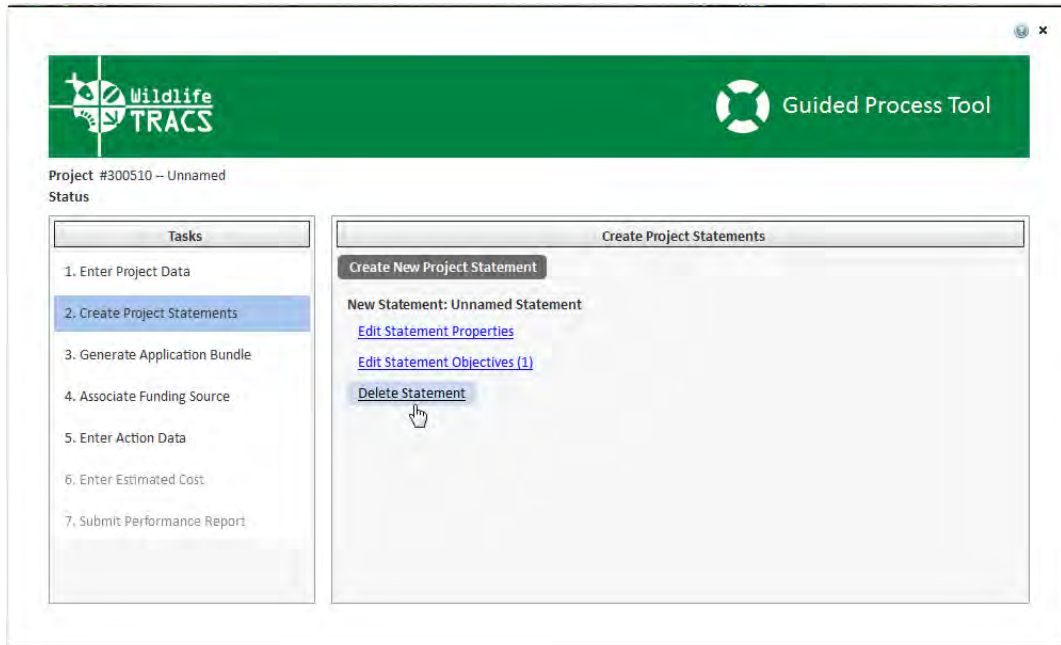
Chapter 6 –Application Report

Step 1

- Click the Generate Application Report link located in the Tasks panel.
- Click on the Workflow link located in the Generate Application Bundle panel.

Figure 1
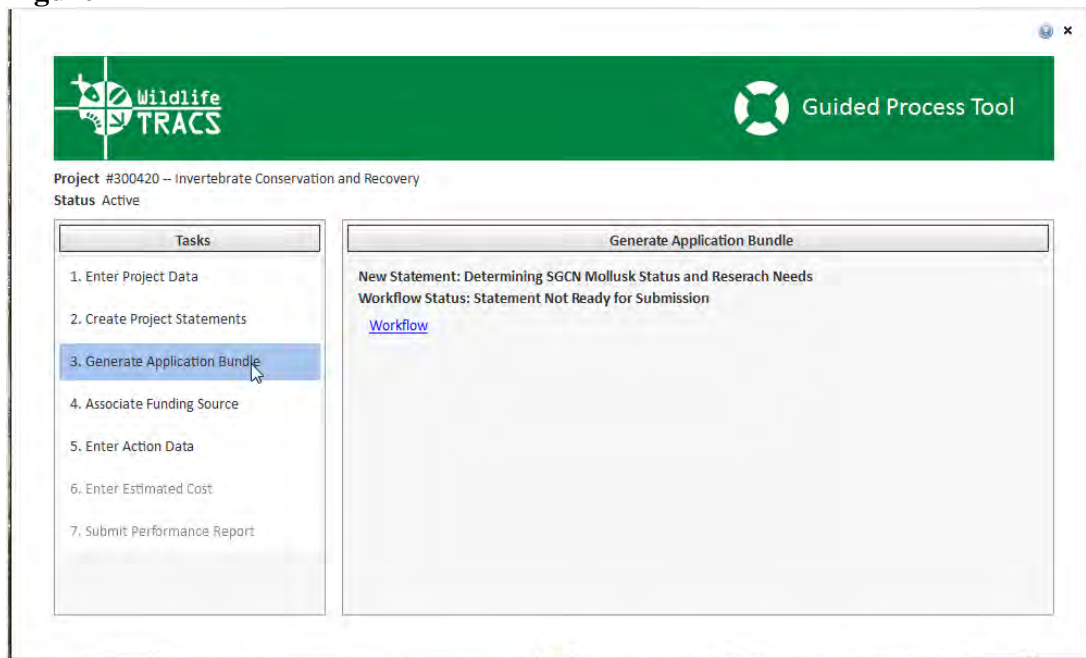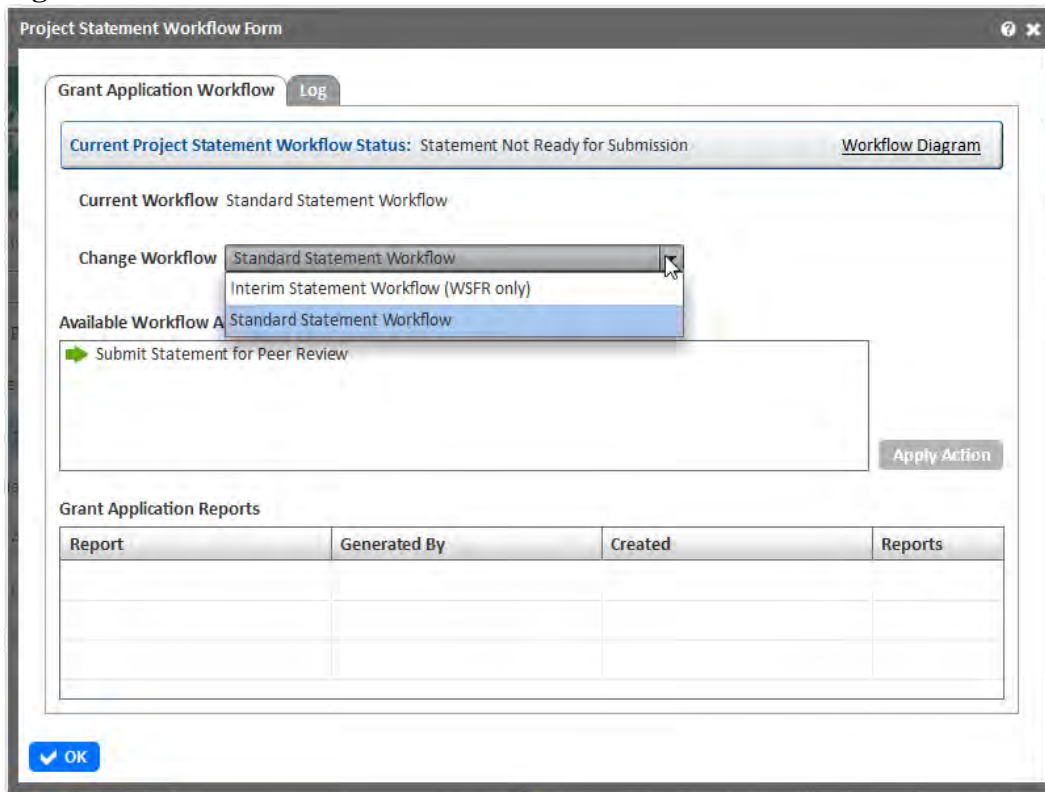
(Figure 1)

Step 2

- Select the Workflow type from the drop down list (e.g. Interim Statement Workflow (WSFR Only) or Standard Statement Workflow).

Note: The Interim Statement Workflow is to be used by WSFR staff to manage the grant application workflow durinng the transition period. The Standard Statement Workflow is to be used when both State and WSRFshare in the responsbility of managing the grant application workflow through the approval process.

Figure 2

(Figure 2)

Step 3

- Click the appropriate Available Workflow Action.
- Click the Apply Action button to execute the selected workflow action.

Note: Continue to click the Available Workflow Actions and the Apply Action button until all applicable actions have been executed. Refer to the Interim Statement Workflow and Standard Statement Workflow diagrams.

- Select the OK button to close the workflow form.

Figure 3

(Figure 3)

Interim Statement Workflow (WSFR only) Diagram
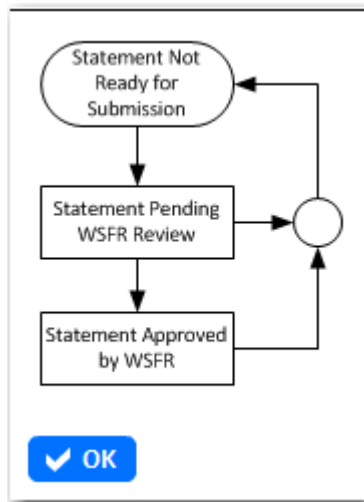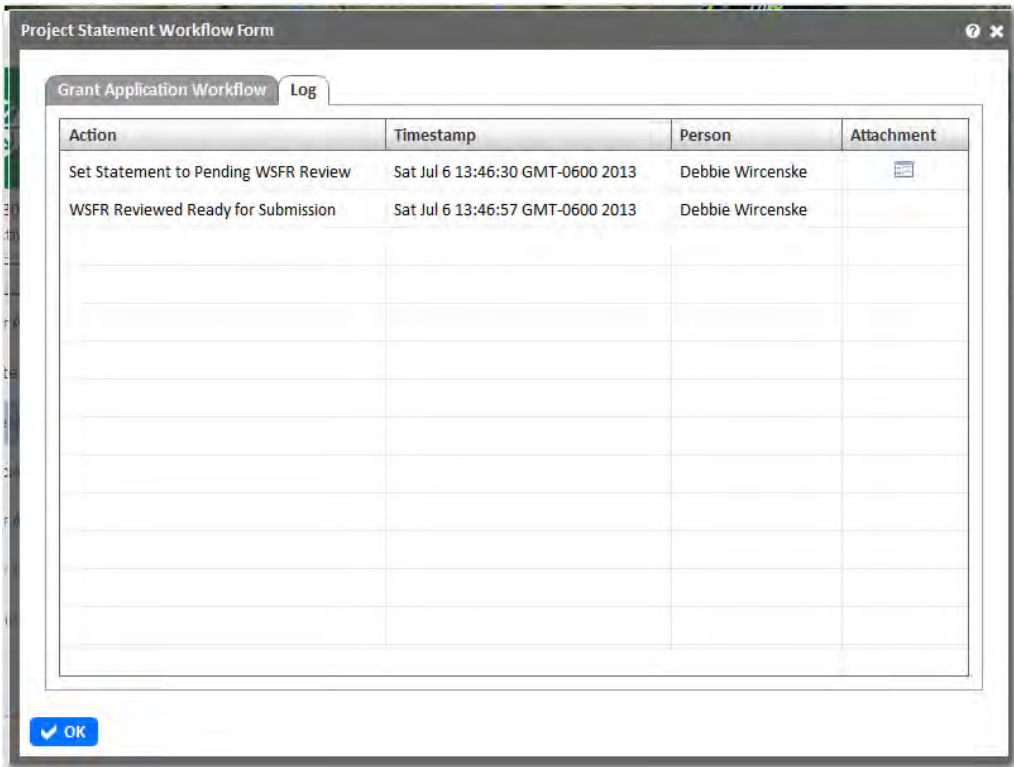
Standard Statement Workflow

You can view the workflow diagram by clicking the Workflow Diagram link located to the far right of the Current Project Statement Workflow Status label.

Click the Log tab to view a log of executed workflow actions. Click the OK button to close the Workflow form.

Chapter 7 – Associate a Funding Source

Edit Funding Source

Step 1

- Click the Associate Funding Source link located in the Guided Process Tool Tasks panel.
- Select the Edit Funding Source link displayed in the Associate Funding Source panel.

Figure 1
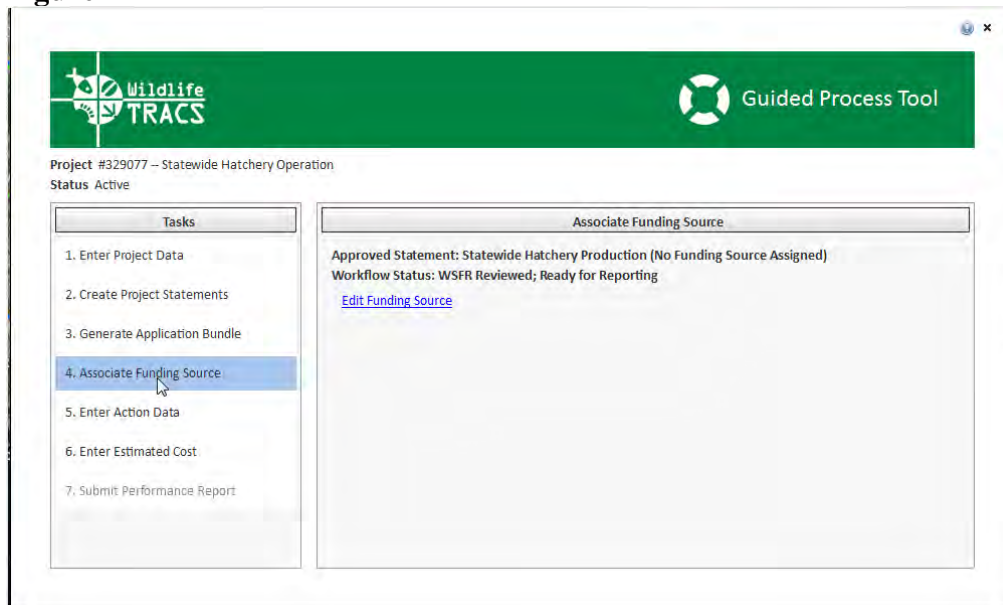
(Figure 1)

Step 2

- Select the Find Grant button
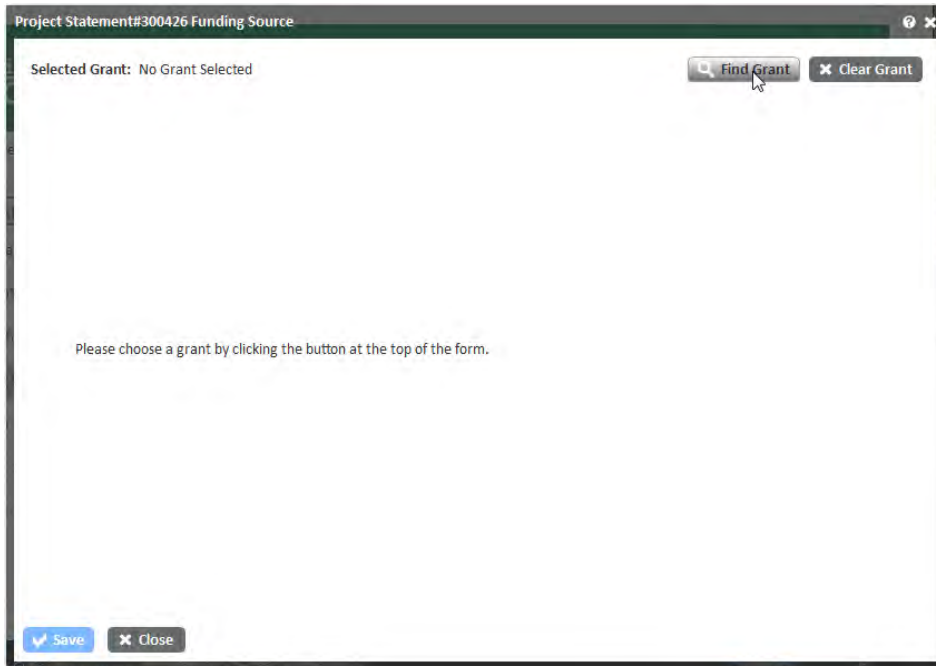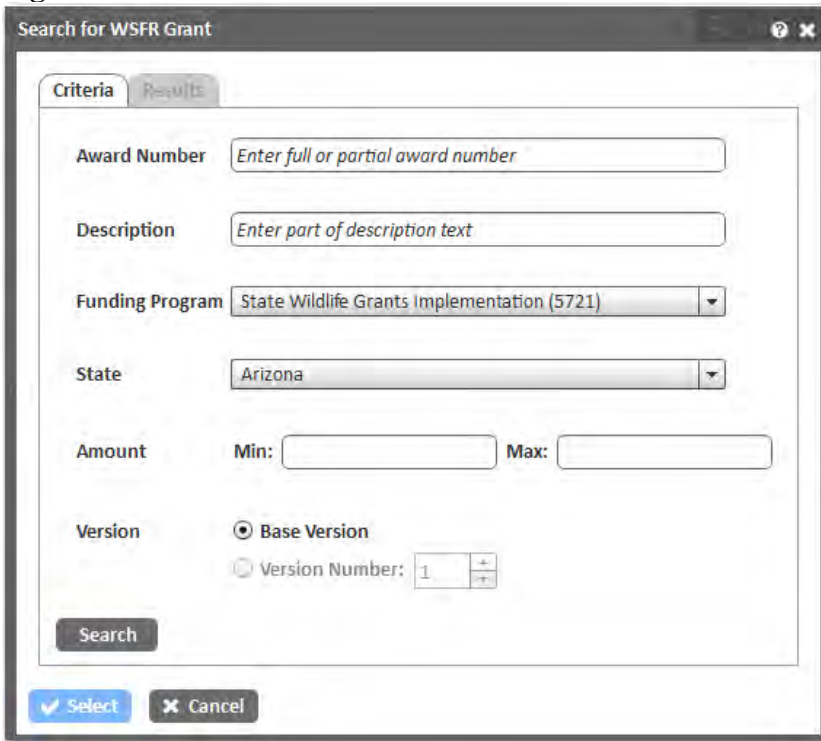
The Search for WSFR Grant form is displayed.

Step 3

- Select the Funding Program from the drop down list (e.g. 5721).
- Select the State from the drop down list (e.g. Arizona).
- Click the Search button to search for the award.

Figure 3

Search for WSFR Grant

Criteria | Results

Award Number | Enter full or partial award number

Description | Enter part of description text

Funding Program | State Wildlife Grants Implementation (5721)

State | Arizona

Amount | Min: | Max:

Version | ● Base Version
○ Version Number: 1
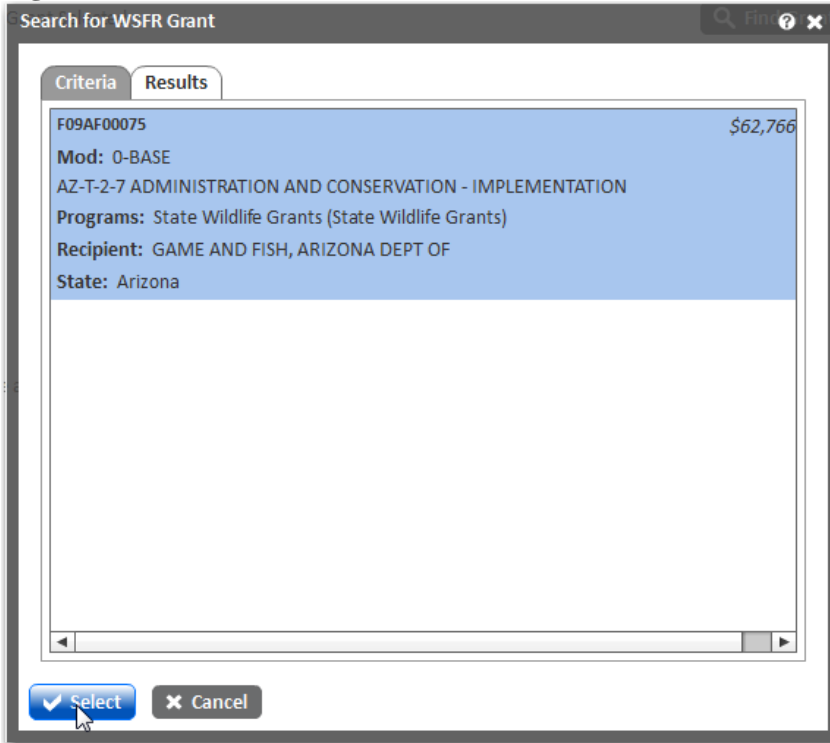
Search

✔ Select   ✖ Cancel

(Figure 3)

Step 4

- Click the desired funding source from the results list. If the desired award is not found, click the Criteria tab to modify your search parameters and search again.
- Click the the Select button when the award is highlighted.

Figure 4

(Figure 4)
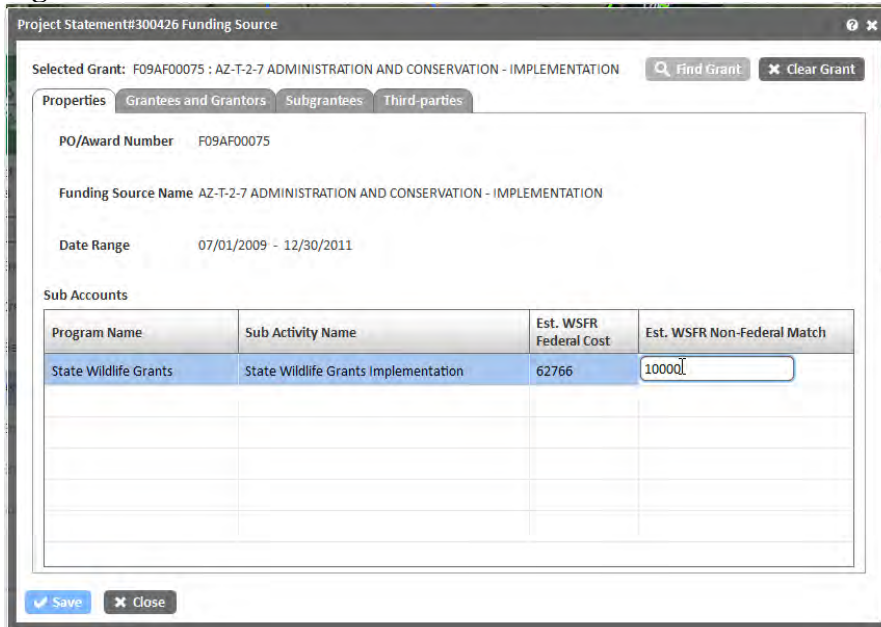
The Project Statement Funding Source form is displayed.

Step 5
- Enter the Est. WSFR Non-Federal Match dollar amount.
- Click the Save button

Note: The Funding Source form data is shared by all Project Statements that utilize the selected funding source. Edits have the potential to impact other Projects.

Figure 5

(Figure 5)

Step 6

- Click the Grantees and Grantors tab.
- Select the Grantors and Grantees from the drop down lists by typing the first three letters of the grantor name and grantee name.

Note: If no matches exist, select the Create New Grantor button and or Create New Grantee button. Refer to Create New Grantor and New Grantee.

- Click the Save button.

Figure 6

(Figure 6)
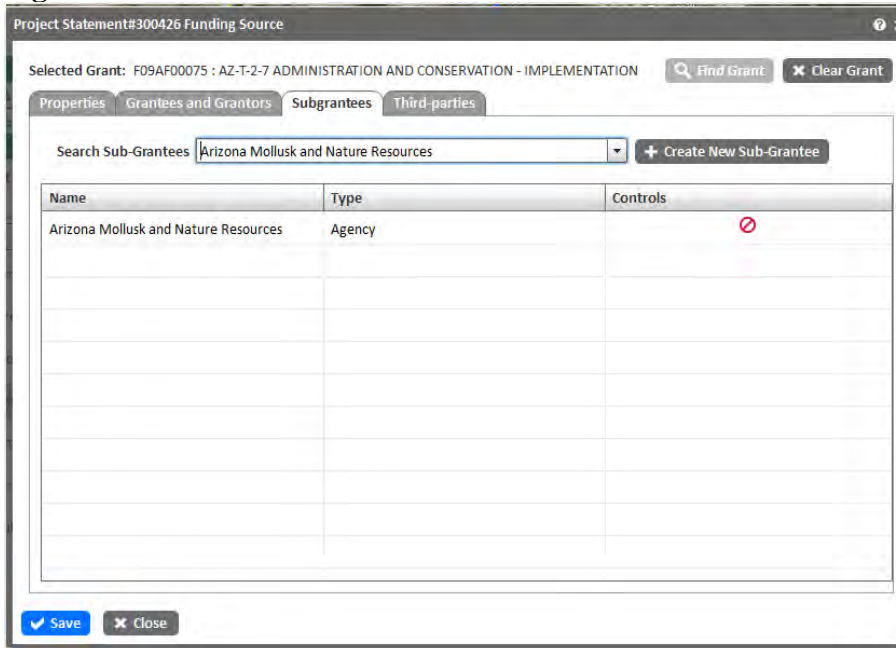
Step 7

- Select the Seach Sub-Grantees drop down list by typing in the first three letters of the sub-grantee name.

Note: If no matches found select the Crate New Sub-Grantee button. Refer to Create New Sub Grantee.

- Click the Save button to save the Funding Source form.
- Click the OK button to confirm.

Figure 7

(Figure 7)

Step 8

- Select the Seach Third-parties drop down list by typing the first three letters of the third-party name.

Note: If no matches found select the Create New Third-parties. Refer to Create New Third-parties.

- Click the Save button to save the Funding Source form.
- Click the OK button to confirm.

Figure 8
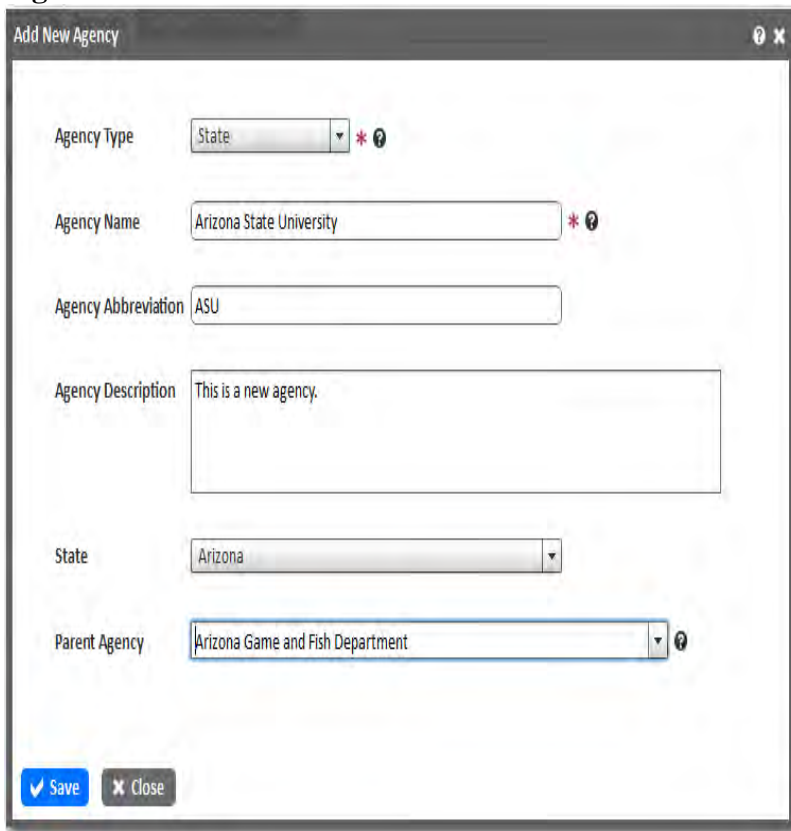
(Figure 8)

Funding Source - Grantee and Grantor

Step 1

- Select the Agency Type (e.g. Federal, State, Tribal).
- Enter the Agency Name, Agency Abbreviation, and Agency Description.
- Select the State.
- Select the Parent Agency from the drop down list by typing the first three letters of the agency name.
- Click the Save button to save the Grantor or Grantee.

Figure 1

(Figure 1)

Funding Source - Subgrantees

Step 1

- Select the Agency Type e.g. (Federal, State, Tribal).
- Enter the Agency Name, Agency Abbreviation, and Agency Description.
- Select the State from the drop down list.
- Select the Parent Agency from the drop down list by typing the first three letters of the Agency name.
- Click the Save button to save the Subgrantee.

Figure 1

(Figure 1)

Funding Source - Third-Parties

Step 1
- Select the Agency Type (e.g. Federal, State, Tribal).
- Enter Agency Name, Agency Abbreviation, and Agency Description.
- Select the State from the drop down list.
- Select the Parent Agency from the drop down list by typing the first three letters of the agency name.
- Click the Save button to save the Third-Party.

Figure 1

(Figure 1)

Frequently Asked Questions

What is an Action?

An Action is an intervention undertaken by a project team to reduce threats, capitalize on opportunities, or restore natural species and ecosystems (equivalent to a "strategy" in the CMP Open Standards). Actions occur within a Project and are used as the reporting mechanism for grants. Known Action information can be added when writing the grant proposal but is optional until required for performance reports.

An Action is user defined and can be represented spatially by a polygon(s) independent of scale. An action is also described by Category, Strategy, and sometimes Activity.

- A Category is a generic descriptor that determines the type of action. This is a pick list in TRACS. Estimated costs are required at this level. This is used as a basis for aggregating like actions for reporting purposes.
- A Strategy is a more specific descriptor that can be used to generate more specific aggregations for reporting purposes. This is a pick list in TRACS. Estimated costs are options at this level; output measures are required.
- An Activity is a specific descriptor intended for very specific reporting needs. This level of detail is optional for all programs except Boating Access and Hunter Education. For programs for which this level of detail is required, outputs are also required. Estimated costs are optional at this level.

How does an Action relate to a Project?

Actions are the actual work that happens under a project. Information on Actions will be used as the reporting mechanism for Projects and Grants.

Is an Action required?

Yes, at least one Action is required per project. Again, this is the reporting mechanism for Projects and Grants.

What is the duration of an Action?

The recommended duration for an Action is one year or whatever time period that matches the grant interim or final performance reporting period.

Can an Action cover a multi-year period?

Yes. Since it is possible to report on interim measures in Data TRACS, it is possible that an Action can span a multi-year period.

Can an Action be repeated?

Yes. An Action can be copied and repeated in another year.

When in the grants process is Action information entered?

Action information can be entered when project information is entered for the grant proposal, but is not necessary. Typically, Action information will be entered for reporting purposes after each year of accomplishments.

Can an Action be copied and edited to create a second Action?

Yes.

Can information from a Project be copied and edited to create an Action, particularly for a Project with just one Action?

Yes. Several types of information can be copied from the Project to create an Action, including the Project polygon and Contacts.

What are best practices for structuring Action(s) in TRACS?

There are a variety of ways for structuring Action(s) under a Project. Examples from different grant programs will be included in the Grant Translation Examples portion of this procedures manual.

Creating Actions

Step 1
- Click the Enter Action Data link in the Guided Process Tool Tasks panel.
- Click the Create New Action link located in the Enter Action Data panel.

Figure 1
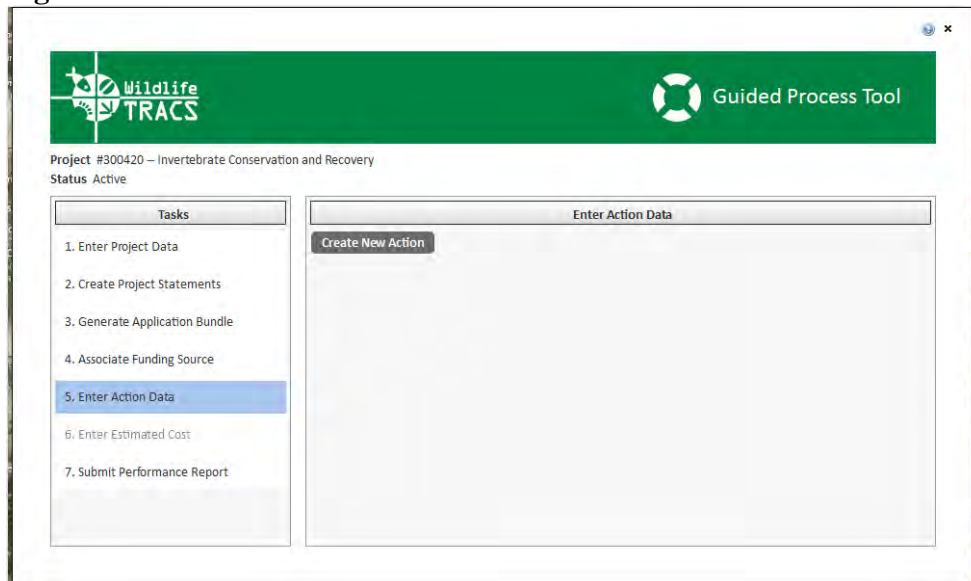
(Figure 1)

Step 2
- Select the Edit Action Location.

Note: Feature Editor and mapper will be displayed.

Figure 2
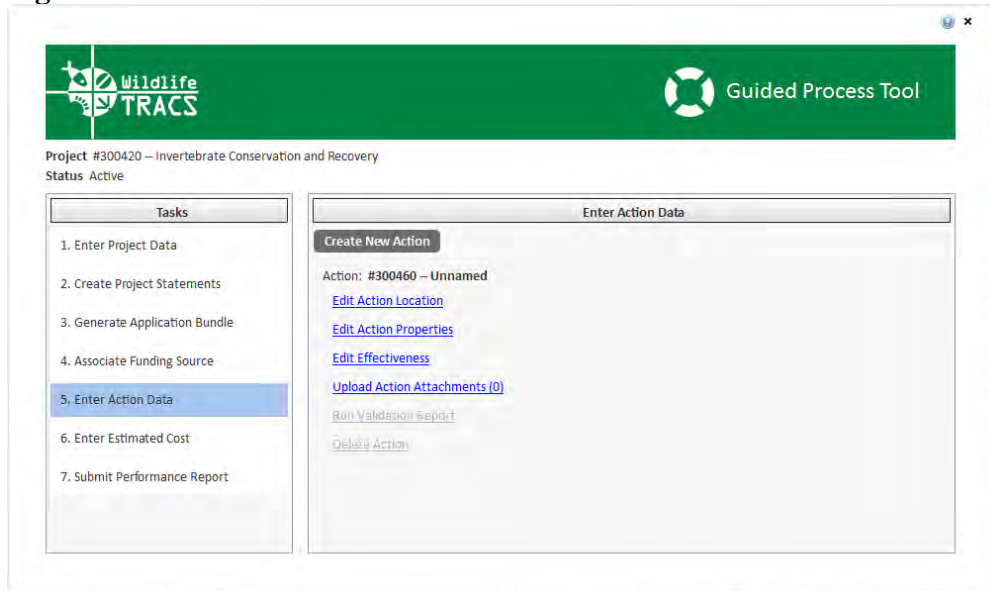
(Figure 2)

Step 3

- Select the Freehand Polygon for Action Area

Figure 3
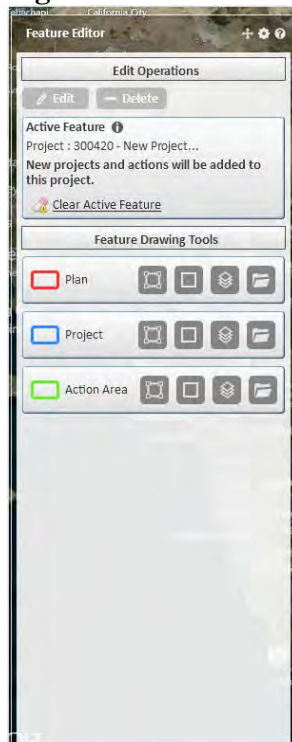
(Figure 3)

Note: The Action polygon is green.

Step 4
- Click the Save button in the Feature Editor when the polygon is complete.

Figure 4

(Figure 4)

Action - Properties

Step 1
- Enter the Action Name (e.g. Survey and Monitoring)
- Select an Action Status (e.g. Draft, Cancelled).
- Enter the Action Start and End Date.

Figure 1

(Figure 1)

Proceed to the Categories tab.

Action - Categories

Step 2

- Select the Category from the drop down list (e.g. Data Collection and Analysis).
- Select the Strategy from the drop down list (e.g. Reseach, survey or monitoring-fish and wildlife populations).
- Enter the output associated with the selected Strategy unit (e.g. 20 projects, 1 database, etc.).
- Select the Activity from the drop down list (e.g. Abudance determination).
- Select the Save button to save the Action.
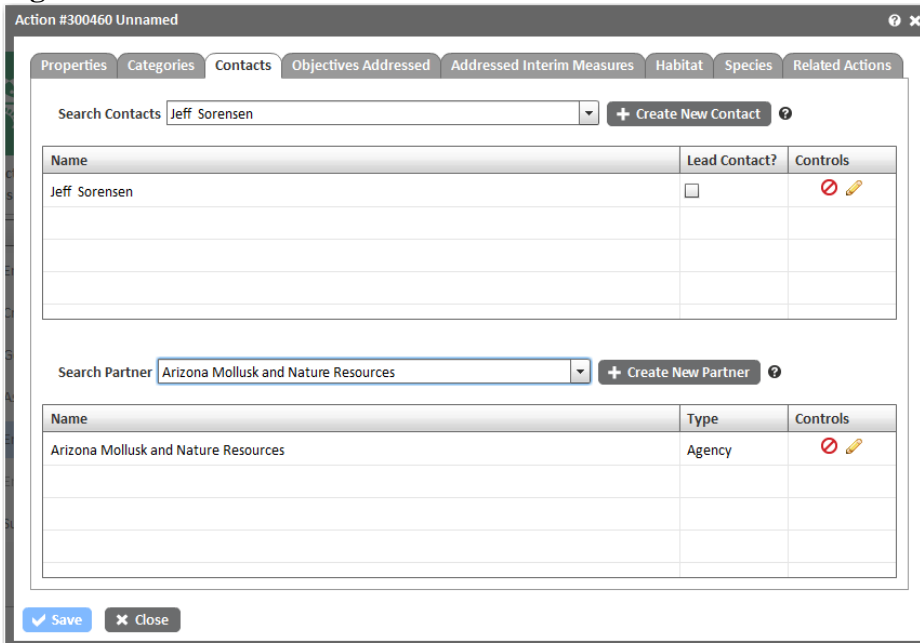
Figure 2

(Figure 2)

Action - Contacts

Step 1

- Select a Contact from the Search Contacts drop down list by typing the first three letters of the Contact name (e.g. Jeff Sorenson).
- Select a Partner from the Search Partner drop down list by typing the first three letters of the Partner name (e.g. Arizona Mollusk and Nature Resources).
- Click the Save button to save the Action form.
- Click the OK button to confirm.

Figure 1

(Figure 1)

Action - Objectives Addressed

Step 1

- Select a Project Statement from the drop down list (e.g. Approved Statement: Determining SGCN Mollusk Status and Research).
- Select an Indicator from the drop down list (e.g. 20 Projects 07/30/2014).

Note: Step 2 will populate the Addressed Objective Field.

Figure 1

(Figure 1)

Step 2

- Enter the Date Reported.
- Enter the Value Reported.
- Enter the Result.
- Click the Add button to add the progress report.

Figure 2

(Figure 2)

Step 3

- Click the Save button to save the Action form.

Figure 3

(Figure 3)

Action – Interim Measures Addressed

Step 1

- Select an Interim Measure from the drop down list (e.g. Determining SGCN Mollusk Status and Research).
- Select an Indicator from the drop down list (e.g. 2 Projects 07/30/2014).

Note: Step 2 will populate the Addressed Interim Measures field.

Figure 1

(Figure 1)

Step 2

- Enter the Date Reported.
- Enter the Value Reported.
- Enter the Result.
- Click the Add button to add the progress report.

Action - Habitat

Step 1
- Click the Habitat tab.
- Select the Current Broad Habitat from drop down list (e.g. Desert Scrub).
- Click the Save button to save the Action form.
- Click the OK button to confirm.
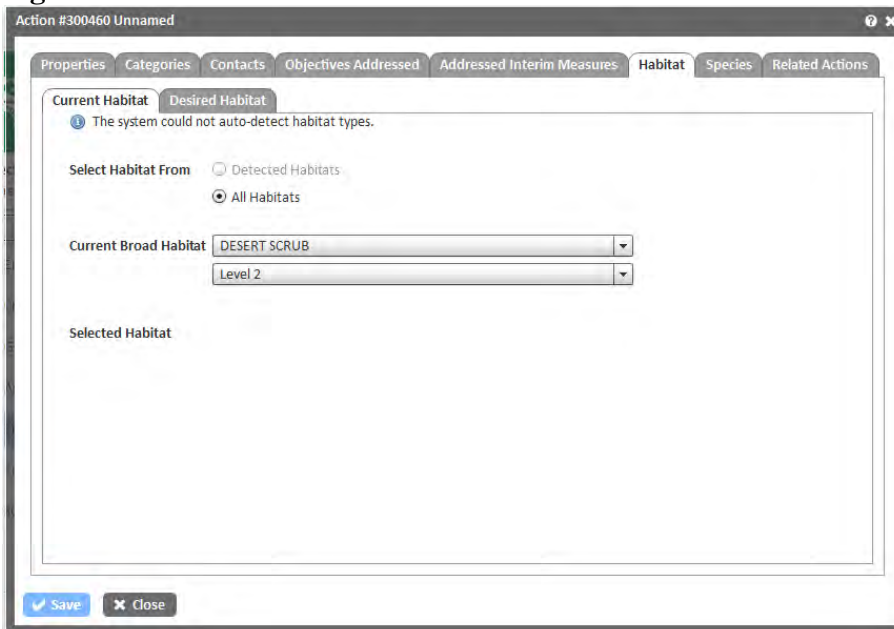
Figure 1

(Figure 1)

Action - Species

Step 1

- Click the Select Species button to add a Directly Benefitted Species.
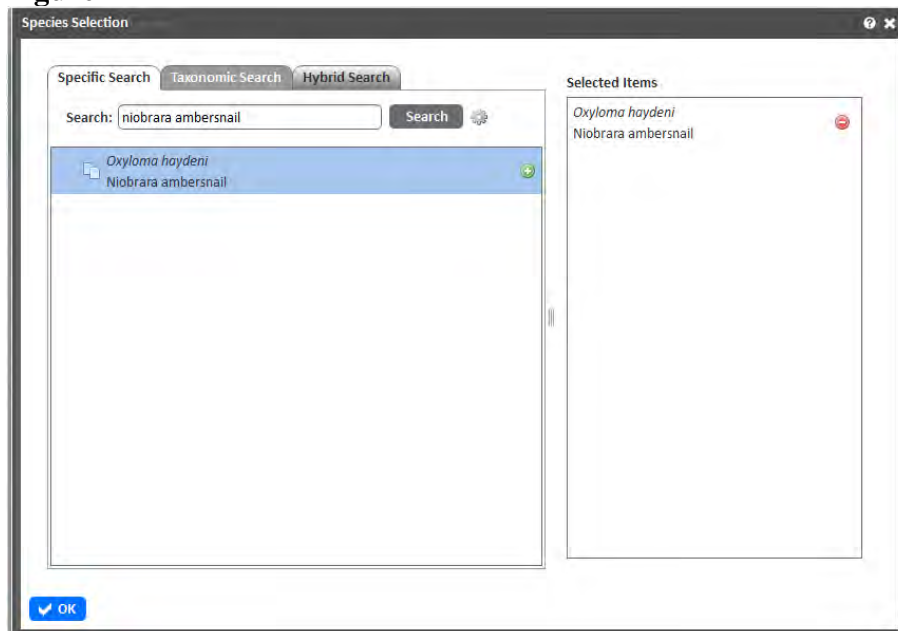
Figure 1

(Figure 1)

Step 2

- Enter the species common or scientific name to search for the species.
- Click a species name to select it.
- Click the plus sign located to the right of the species name to add it to the Action.
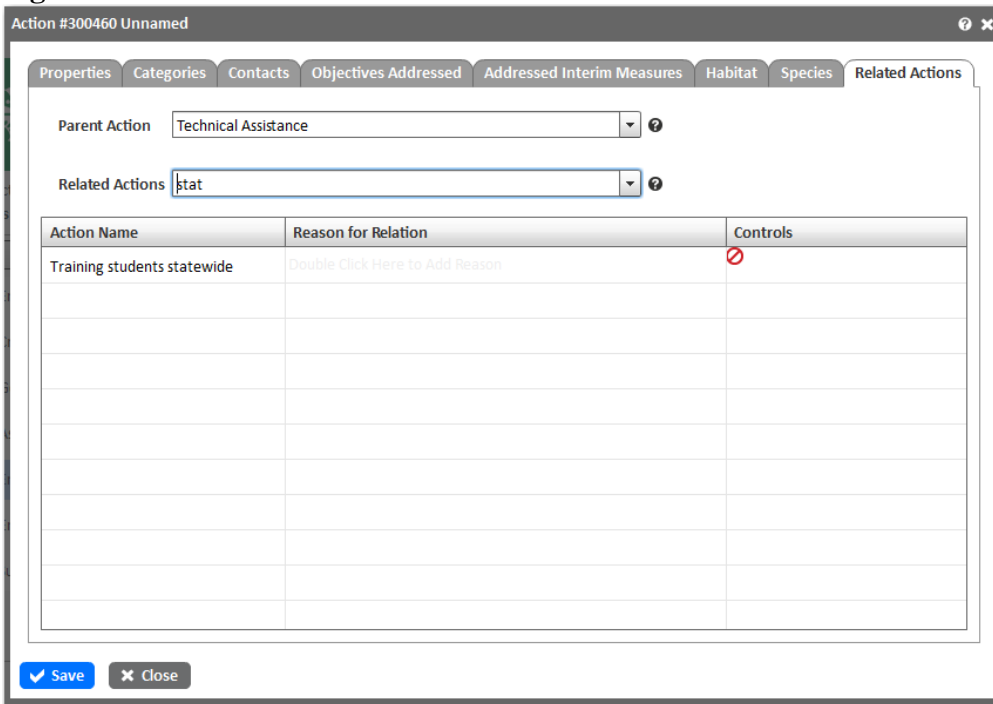- Click the OK button to close the species form.

Figure 2

(Figure 2)

Actions - Related Actions

Step 1

- Select a Parent Action from the drop down list by typing the first three letters of the Parent Action.
- Select a Related Actions from the drop down list by typing the first three letters of the Related Action.

Figure 1

Action #300460 Unnamed

Properties | Categories | Contacts | Objectives Addressed | Addressed Interim Measures | Habitat | Species | **Related Actions**

Parent Action: Technical Assistance

Related Actions: stat

Action Name	Reason for Relation	Controls
Training students statewide	Double Click Here to Add Reason	⊘

Save   Close

(Figure 1)

Action - Attachments

Step 1
- Click the Enter Action Data link located on the Tasks panel.
- Click the Upload Action Attachment link located on the Edit Project Data panel.
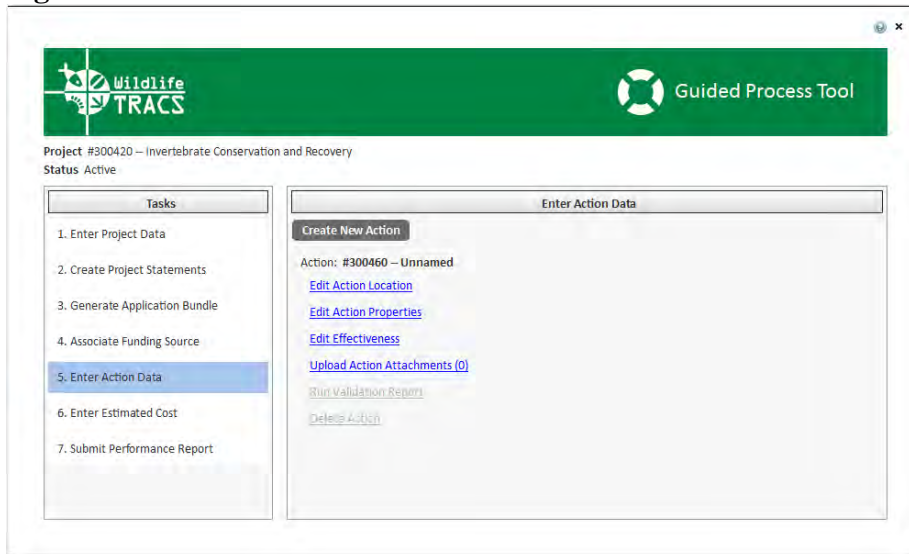
Figure 1

(Figure 1)

Step 2
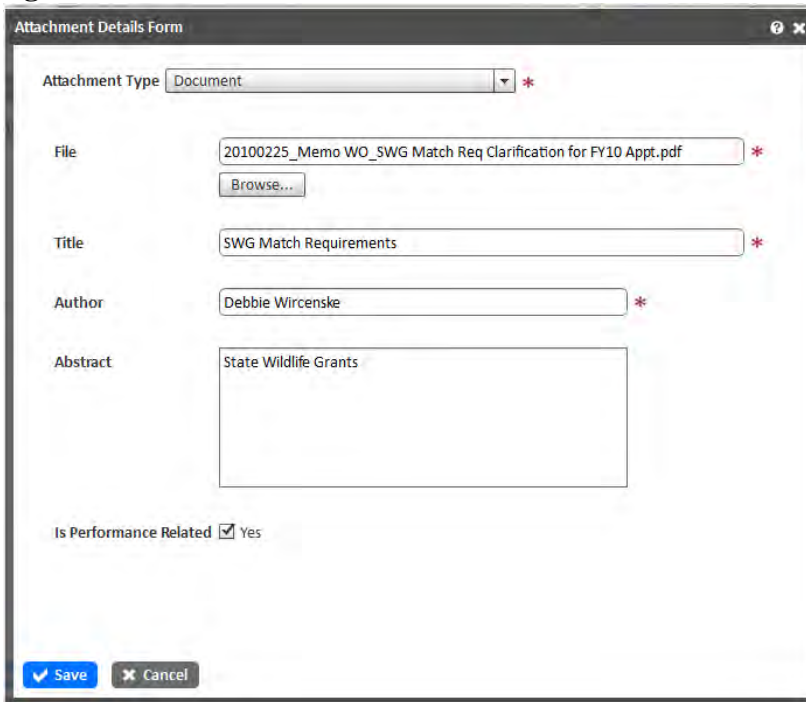- Click the Add Attachment link.

Figure 2

(Figure 2)

Step 3

- Select the Attachment type (e.g. document, map, video).
- Select a file to upload from your local system using the file Browse button.
- Enter the Title, Author, and Abstract.

Note: Indicate if the attachment is Performance Related by selecting "Yes." A link to the attachment will be included in the performance report.

- Click the Save button.

Figure 3

(Figure 3)

The attachment will be listed in the attachment grid once it is successfully uploaded. Click the OK button to close the Attachment form.
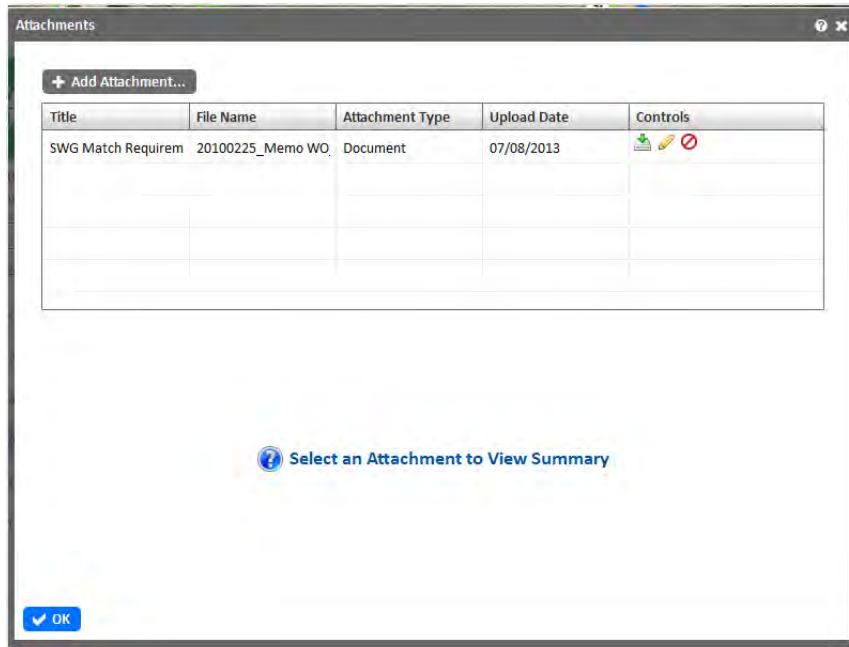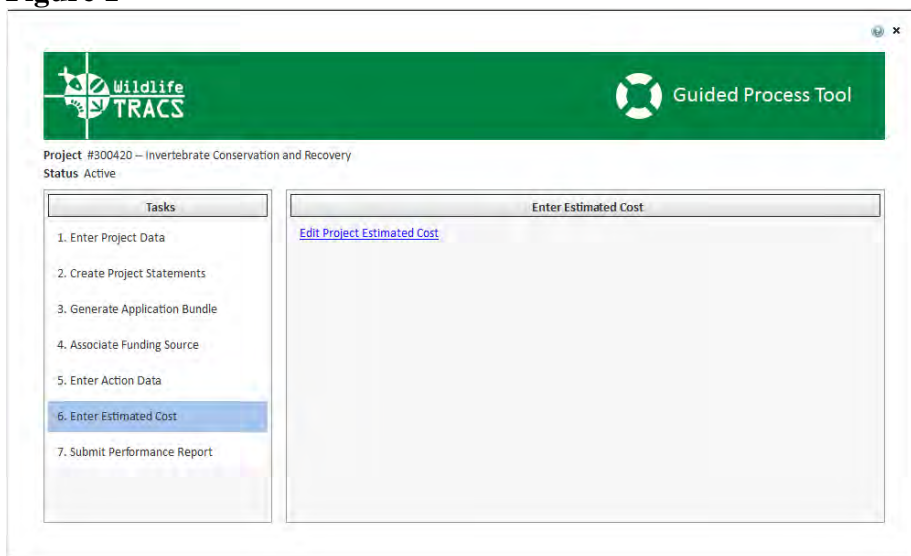
Chapter 9 – Estimated Cost

Enter Estimated Cost

Step 1
- Click the Enter Estimate Cost link located in the Guided Process Tool Tasks panel.
- Click the Edit Project Estimated Cost link located in the Enter Estimated Cost panel.
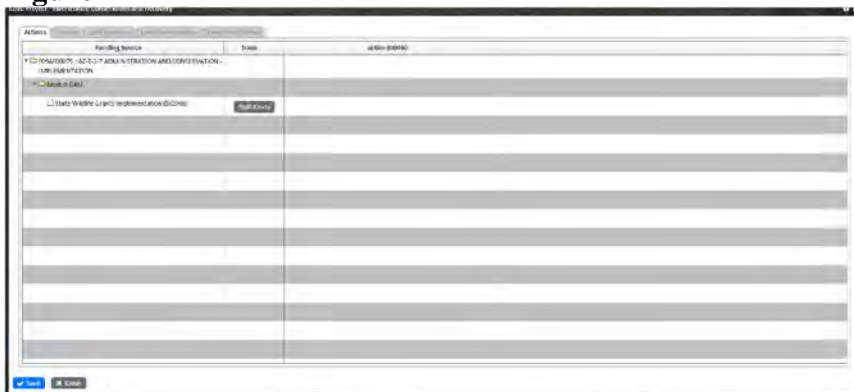
Figure 1

(Figure 1)

Step 2
- Under the Action Cateogry column, click the Split Costs button to distribute costs across actions on a percentage basis.
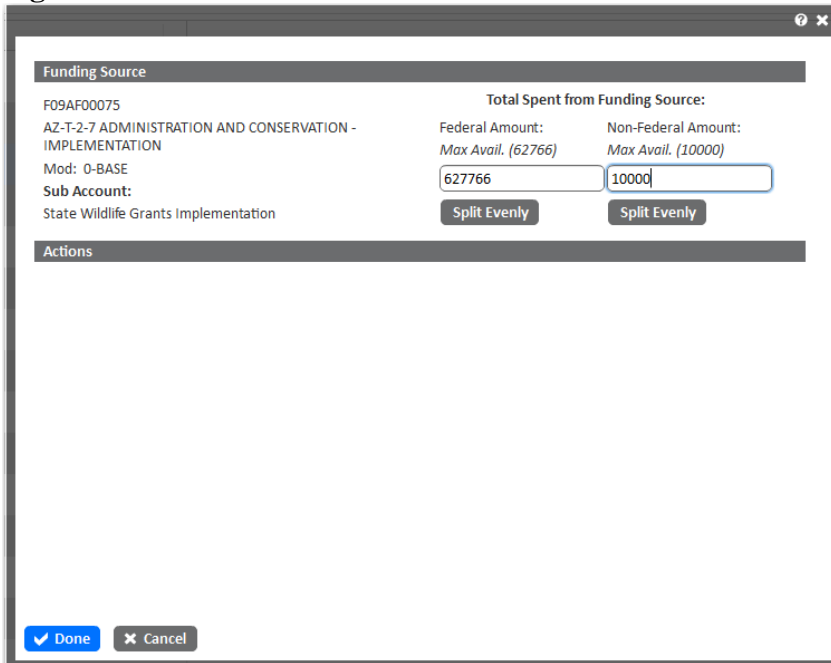
Figure 2

(Figure 2)

Step 3

- Enter the estimated cost breadown of Federal Amount and Non Federal amount across all actions for each funding source.

Note: Cost estimates at the Strategy and Activity levels are optional. To apportion costs evenly between actions or by custom percentages, use the Split Costs button in the Tools column.

Note: Species cost estimates are only required for directly benefitted species.

- Click the Done button to close the Split Costs form.

Figure 3

(Figure 3)

Step 4
- Click the Save button to save the Estimated Costs form.
- Click the Close button.

Figure 4
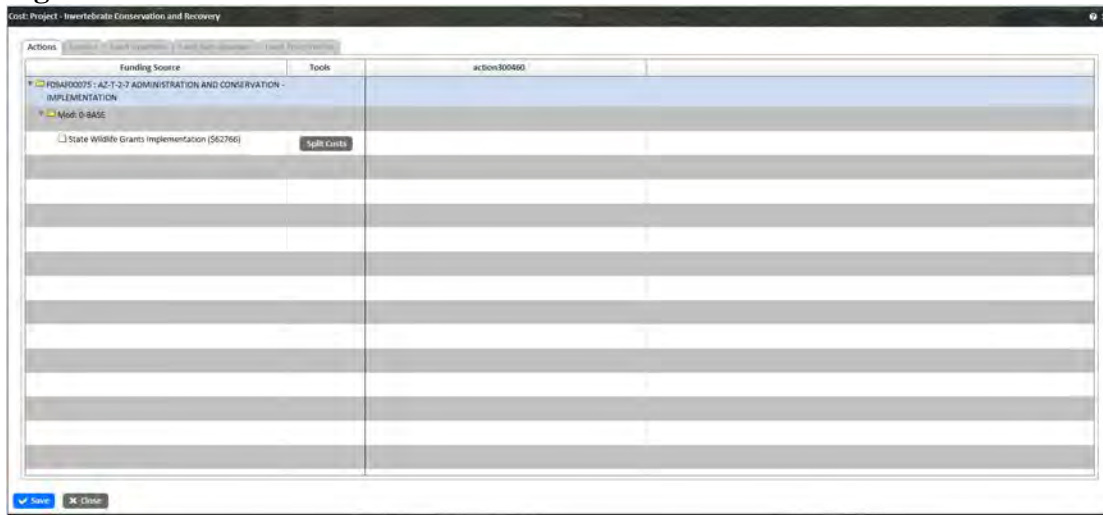
(Figure 4)

Chapter 10 – Submit Performance Reports