



# EcoAtlas Project Tracker Instructions for Permittees

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## Project Goals and Background:

The goal of this guidance is to formalize the process for adding adaptation, shoreline projection, and habitat restoration projects to the regional database. This database forms the basis for the [Shoreline Adaptation Project Map \(SAPMAP\)](#) and will support regional adaptation planning and regulatory

decision-making<sup>1</sup> and aligns with guidance developed for projects being added due to eligibility for funding. Currently, BCDC uses EcoAtlas (<https://ecoatlas.org/>) to achieve the goals of contributing to a regional database of projects. Project Tracker (<https://ptrack.ecoatlas.org/>), is the data entry portal for EcoAtlas, and is referred to throughout this document.

In this context, adaptation is specific interventions or ways to manage the shoreline, flooding, and sea level rise. These interventions can be combined and implemented over time in a planned sequence that is appropriate to the landscape setting and, over time, helps to manage and reduce various coastal risks, including erosion, fluvial flooding, sea level rise, and combined (fluvial and tidal) flooding (SFEI 2019).

Certain BCDC permittees are required to use the Project Tracker tool to create and maintain an EcoAtlas entry as a special condition of the permit for certain habitat restoration, shoreline adaptation, and shoreline protection projects. Generally, projects meeting the following criteria will be prioritized for inclusion in EcoAtlas.

- **Impact** – Projects to be prioritized for inclusion should have a regional impact, either in terms of scale, cost, infrastructure, or ecosystems protected, knowledge gained, or jurisdictions involved. In the long term as a formal process for including project information is more robust, the region should include small local projects that may have limited regional impact may still present opportunities to coordinate adjacent landowners or highlight community-led efforts.
- **Stage of Planning** – Projects initially prioritized should be at a stage in planning where design and cost will not be changing substantially. The project plans or design has been locally adopted (local gov commission, community-based organization board, etc...), regardless of stage of planning to accommodate inclusion of conceptual plans.
- **Spatial**– Projects that have an approximate spatial footprint (e.g. polygon) should be prioritized for inclusion. At this time, projects that are at early stages of planning and represented by single points were not included. Only projects located along the San Francisco Bay shoreline should be added to this group (9-county Bay Area projects outside of the Bay e.g., Delta and coast may be added but are not a priority). Along the tidal transect, these projects may be located within the shallow subtidal Bay upstream to the depositional reach of the lower watershed. The depositional area in consideration should not be too far from the head of tide and projects in this reach should have flood management components to them.
- **Activity Type** – Initial priorities for inclusion should be physical adaptation projects. Long term, non-physical projects (i.e., regulatory measures), vulnerability assessments, and community-led planning could also be included. Fish passage, invasive species management, or related projects that do not have a physical restoration element were not included at this time.

The general workflow includes 1) identifying projects, 2) adding projects into Project Tracker, 3) verifying records, and 4) visualizing information.

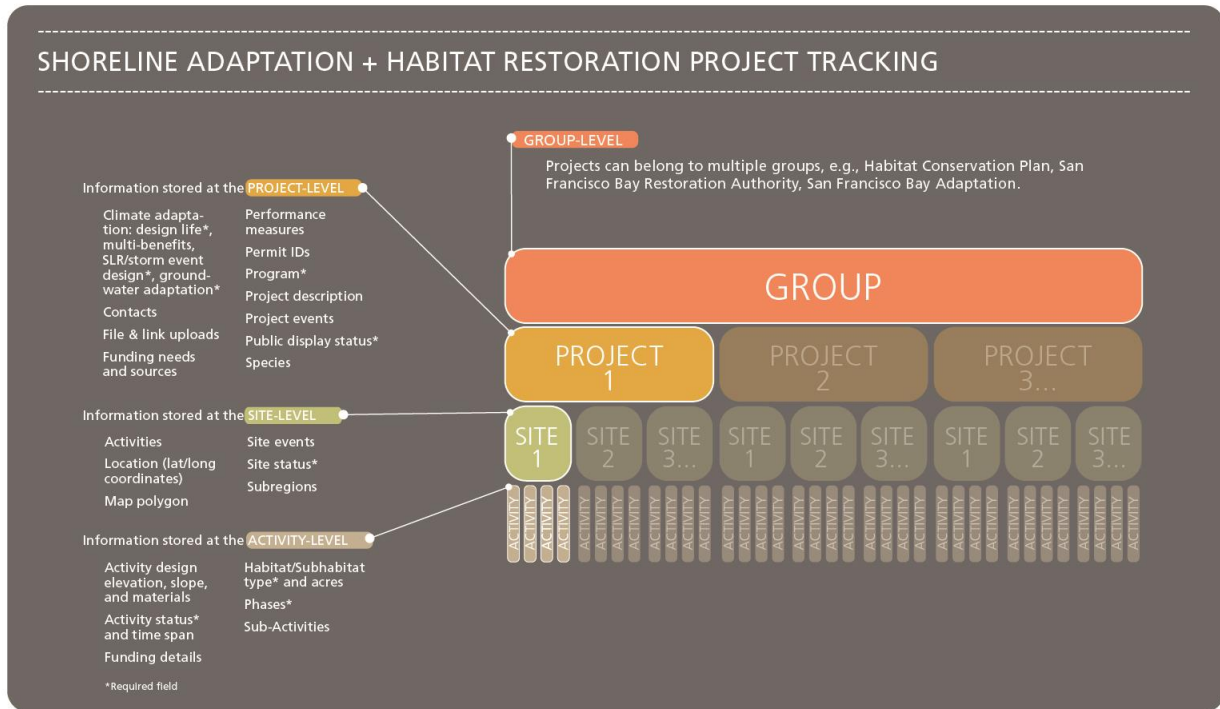
## Overview of Project Tracker Data Structure:

Project Tracker uses a hierarchical structure to organize project data. Groups are the highest level. Within a group, there can be several projects. Conversely, projects can also belong to multiple groups. The Project level contains the main project information, such as the project description and total project cost. The next level of data are sites. Within a project, there can be several sites that each represent a

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<sup>1</sup> <https://www.adaptingtorisingtides.org/project/shoreline-adaptation-project-mapping-program/>

geographically distinct area. The site level contains information relevant to a specific site, such as the location or site-specific events. The next level of data are activities. Within a site, there can be several activities representing different project phases or project components. The activity level contains information on the associated habitats and secured funding.



## Getting Started:

Please add or update your project in [Project Tracker \(https://ptrack.ecoatlas.org/\)](https://ptrack.ecoatlas.org/). You can create a new account at <https://ptrack.ecoatlas.org/user/register>. Accounts require approval from a Project Tracker administrator. Approval may take a few days.

There are general Project Tracker [instructions \(https://ptrack.ecoatlas.org/instructions\)](https://ptrack.ecoatlas.org/instructions) on the site in addition to the below guidance.

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

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

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

## Navigation Buttons (READ ME!):

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

## Create Project Tracker Project Entry:

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

\*\*indicates fields required by Project Tracker

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

Make sure to include the following, at a minimum:

### Main Entry Page

**Project Name\*\***: Enter the project name (NOTE: Use formal name used in plans, permits, or project website.)

**Public Status\*\***: Public

**Administrative Region\*\***: “San Francisco Bay Adaptation” for new projects, but if the project is already required to be added for a different admin region (e.g. San Francisco Bay Joint Venture), then that Administrative Region should be selected. If a project changes to being administered by a different region over time, this field should be changed to reflect that.

**Project Type\*\***: Please select one of the following: “Non-mitigation” (Voluntary restoration project that does not require compensatory mitigation), “Impact” (Development project or impacted site), “Unknown/Unspecified” (Project type unknown or unspecified).

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

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

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

**EcoRegion\*\*:** “Bay/Delta”

**Regional Board\*\*:** “San Francisco Bay”

**County:** Select the appropriate county or counties.

**Funding Need:** Enter the funding amount needed in dollars. The funding need can include both planning and construction costs. Note: This value is used when summing regional funding needs.

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

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

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

**Project information source:** Can be website, proposal, plan, or permit. Provide citation, permit number, or website URL.

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

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

**Event Date\*:** Enter the date of the event

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

## Contacts Tab

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

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

Note: If you have a community-based organization as a project partner, please include a contact with the “Community Partner” role

## Alternate project IDs Tab

**Alternate Project ID\*:** Enter the BCDC permit number if already assigned (i.e. 2019.003.01). This is in addition to any other Project IDs that may be requested (i.e. Water Board 401 Certification WDID or SFBRA Project ID). If BCDC has not yet issued a permit, leave blank.

**Permit or ID Type\*:** BCDC - Permit Number (e.g. 2018.018.00)

**Date Issued:** Enter date that the project was authorized by BCDC (also found on the BCDC permit). If not yet issued, leave blank.

## Climate Adaptation Tab

The climate adaptation features of a project are included to facilitate regional knowledge of shoreline resilience and facilitate regional planning. If climate adaptation features are not yet known due to the stage in design, please indicate that for the required questions below.

**How long is the project designed to function? \*\*** This is the year the project is designed to function through, at its location, through one or more repair or maintenance cycles, but without significant intervention or upgrade (e.g., 2050). For Unknown/Unspecified/Not Applicable, please indicate “9999”.

**How much sea level rise will the project be adaptable to in feet? \*\*** This is the level of sea level rise the project is designed to accommodate, expressed as feet above mean higher high tide. Round down to the nearest half (e.g., if 1.4’ round to 1’). If project includes multiple sea level rise design conditions, please choose the lowest value. If unknown, indicate “Unknown/Unspecified/Not Applicable”.

**What storm event is the project designed to accommodate? \*\*** This is the storm event or extreme water level the project is designed to accommodate (e.g., 100 yr). These are typically a combination of the astronomical tide, storm surge, and limited wave setup caused by breaking waves. If unknown, indicate “Unknown/Unspecified/Not Applicable”.

**What type of climate adaptation project is this? \*\*** These are different categories of project types that reflect their incorporation of conventional/grey infrastructure, natural and nature-based solution, or a combination of both (hybrid). Hybrid projects are physical features created to provide coastal protection that integrate both nature based and convention infrastructure. Hybrid projects must include functional nature-based design beyond simply including landscaping. If unknown, indicate “Unknown/Unspecified/Not Applicable”.

**What are the benefits of the project?** These are the stated goals and associated benefits of the project. These may be tied to different funding categories. [Full list of benefits and definitions.](#)

**Does the project consider or address shallow groundwater flooding?** Shallow groundwater rise is the change in elevation of an unconfined aquifer in response to sea level rise and winter storms. This change in elevation can impact subsurface infrastructure or can lead to emergent flooding in low lying areas. If the project analyzed impacts from this flood hazard or developed adaptation measures in response, please indicate ‘Yes’. If unknown, indicate “Not Applicable/Unknown/Unspecified”.

**Climate Adaptation Comments:** Indicate if plan or monitoring reports will be required and uploaded on a set schedule.

## Group Tab

**Groups:** Please tag it with the Group “[San Francisco Bay Adaptation](#)”. Only SF Bay shoreline adaptation, shoreline protection, and habitat restoration projects should be added to this group. Along the tidal transect, these projects may be located within the shallow subtidal Bay upstream to the depositional reach of the lower watershed. The depositional area in consideration should not be too far from the head of tide and projects in this reach should have flood management components to them.

Note: Project may be added to multiple groups (i.e. If the project is eligible or funded by the SFBRA please also tag with “[San Francisco Bay Restoration Authority \(Eligible\)](#)” or “[San Francisco Bay Restoration Authority \(Funded\)](#)”, as appropriate. Selected groups will appear in the right pane “Selected

Groups". To remove a group, click on the group in the "Selected Groups" pane and it will be moved back to the "Available Groups" pane.

## Files & Links Tab

Files and Links are the location where Adaptation Plans, Monitoring Plans, Habitat Monitoring, and/or Flood Monitoring Reports are uploaded for access and retrieval by BCDC staff and the public. Please notify BCDC staff at [info@bccdc.ca.gov](mailto:info@bccdc.ca.gov) when documents have been uploaded. Other programs may require you to upload staff recommendations, certifications, etc...

Click green "Add a File or Link" button

- For file uploads, enter a value in the Title field, then click Save. After saving, you can then upload files by clicking "Upload File(s)".
- Files may include reports, photos, spreadsheets, or other related documents.
- Documents cannot exceed 50MB and file types are limited to pdf, jpg, png, csv, xls, docx, txt, kml, kmz.
- Documents will be available on the project's Files & Links page on EcoAtlas once approved for display.
- Depending on the type of document you are uploading, there are slightly different settings (see below).

### Habitat Monitoring Plan

**Title\*:** [Project Name] Habitat Monitoring Plan

**Type\*:** Plan or Permit

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

**EcoAtlas Display Status\*:** Approved

### Habitat Monitoring Report

**Title\*:** [Project Name] Year [X] Habitat Monitoring Report

**Type\*:** Monitoring Report

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

**EcoAtlas Display Status\*:** Approved

### SLR Adaptation Plan

**Title\*:** [Project Name] Flood Monitoring Plan

**Type\*:** Plan or permit

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

**EcoAtlas Display Status\*:** Approved

## BCDC Flood Monitoring Report

**Title\*:** [Project Name] Year [X] Flood Monitoring Report

**Type\*:** Monitoring Report

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

**EcoAtlas Display Status\*:** Approved

### Add New Site to Project Tab

Click the Green “Add New Site to Project” button on the left pane

#### Site Details

**Site Name\*:** The Site Name should represent the geographic area of the project (i.e., American Canyon Wetlands). If project has more than one site, name the site appropriately by specifying the geographic region (i.e., Pond A22 and Pond B33). The best practice is to separate any habitat restoration and flood protection activities into separate sites.

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

Least Progress  Most progress

Planning/Scoping  In-progress/Implementation  Completed

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

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

#### Activities

Activities are seated below the Site level, therefore there can be multiple activities at each site and multiple funding sources per activity. Recording funding at the Activity level is important because each activity could have different funding sources. The goal is to capture the primary and secondary Activity/Sub Activity type for a given site. When identifying primary and secondary activity types, care should be taken to include the adaptation feature along the uppermost portion of the tidal transect to capture the elevation beyond which the project would be overtopped by flooding. If the project only includes intertidal adaptation features, the uppermost activity should be included. For example, if there is an eelgrass bed, a mudflat, and a tidal marsh in a project, the tidal marsh should be one of the two activity types since it is at the uppermost portion of the tidal transect for that project.

**Activity Type\*:** Choose the appropriate option from the drop-down menu. Common Activity Types are



Restoration/Rehabilitation, Grey Infrastructure, and Demonstration. A [table of definitions](#) can be viewed by clicking the “i” icon.

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

**Sub Activity Type:** Choose the appropriate sub-activity types. Common Sub-Activities include Vegetation, Sediment Management, Elevate Land, Ecotone Levees, Bulkheads, Levees and Dikes. See [table of definitions](#) for Sub-Activities and their associated Activities.

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

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

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

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

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

**Easement/Agreement Time Span\*:** (if applicable)

**Habitat Type/Sub Habitat Type\*:** In Project Tracker, you must first select a Habitat Type and then the appropriate Sub-habitat Type. For “Grey Infrastructure” Activities with no habitat, you should select Habitat Type as “None”.

Note: If your project area has multiple habitat types with defined acreage for each, record the primary habitat type within the activity and list all habitat types and associated acres in the Project Description. In the future, we hope to update Project Tracker to allow for entering multiple habitat types within a single activity.

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

**Habitat or Activity Size:** Enter size of habitat in acres. This ensures a more accurate measurement of the total habitat acreage, which is summarized for the region. Note: Include the acres here even if you do not want these acres to be added to the total project area.

**Units\*:** Acres

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

For example, if you have an activity for the final design phase with the “Include these acres in reported Project Area” box checked. You should then uncheck the box for the implementation phase activity to

avoid double counting of acres and misrepresenting the project size. For activities occurring in the same geographic area, only one of the activities should have this box checked.

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

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

**Elevation - Upper Range:** This is the highest elevation for the project activities e.g., marsh elevation, beach crest, levee crest, sea wall) in feet North American Vertical Datum 1988 (NAVD 88). For Activities with a range of upper elevations, enter the lowest. If unknown, leave blank.

**Elevation - Lower Range:** This is the lowest or most bayward elevation for the project activity (e.g., toe of structure, lowest elevation of aquatic vegetation planting) in feet NAVD 88. For Activities with a range of lower elevations, enter the lowest. If unknown, leave blank.

**Slope:** This is the seaward facing slope of the project activity (e.g., marsh, levee, berm, sea wall) expressed as the ratio of horizontal distance to vertical rise (H:V). (e.g. If slope is 2 ft:1 ft, enter '2'.

**Ground Surface Characteristics:** This is the dominant surface material of the seaward facing slope of the project element. You can select multiple surface types. For example, this could be coarse sediment, upland vegetation, and riprap. A [table of definitions](#) can be viewed by clicking the "i" icon.

## Funding

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

**Funding Entity/Program\*:** Select Funding Entity/Program from list. If not listed, please include "Unknown/Unspecified...Funder". Other funding sources can be added separately by clicking the green "Add Funding button"

**Funding Amount:** Enter the funding amount. Funding amounts will automatically be totaled and displayed on the "Funding Secured to Date" project details page.

## Site Events

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

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

## Map

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

Acceptable upload file formats:

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

Congratulations on completing your Project Tracker entry! **Please notify BCDC Staff or [GIS@bccdc.ca.gov](mailto:GIS@bccdc.ca.gov) that project data is entered, and display status needs to be made public.** Your project will display on EcoAtlas after it is approved by an administrator. This process can take 1-2 weeks.