TRACS Quick Reference Guide

Lesson 2 – Creating a Map of your Project	
Step	**Action**
1	Login to TRACS.
2	Select the Mapper button.
3	Click on the **Guided Process Tool** icon from the main toolbar.
4	Click on the **Start New Project** link.
5	Select the drawing method for the project: 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. **Geometric Polygon** allows end-users to capture specific location areas which are linear (point-to-point). Geometric Polygon areas are created by left clicking the mouse of the map to a single vertex. Continue clicking the left mouse button at each vertex of change in direction until the desired polygon is visible. Double click the left mouse button to complete the feature. **Geopicker Tool** is used to select a shared shape from a reference layer. The tool allows end-users to capture specific location areas which have pre-determined boundary types (Political, Hydrological, Coastal or Alaska). **Select "Political" in order to pick the State boundary** (or select a specific county or congressional district). Some states may also have shared layers (such as Wildlife Management Areas, etc.) **Import Shapefiles** from a local source. A shape file contains spatial features which represent a specific type of location. e.g., rivers and lakes. The import tool requires a zip file that contains standard shape file extensions.
6	Click the **Save** button.
7	The **Project Properties** tab opens.

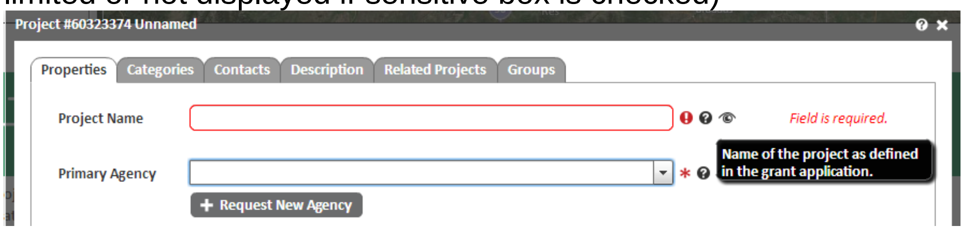
<table>
<tr><th colspan="2">Lesson 3 – Defining Project Properties</th></tr>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

Important Icons:

Symbols for Required fields (box around field will also appear in red if status is Active)

Hover to view information about the field

Indicates field will be displayed on Public reports (some fields may be limited or not displayed if sensitive box is checked)



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<tr><td>2</td><td>

Properties tab

- **Project Name:** The standard Naming Convention is: a two-letter State/Territory abbreviation followed by a hyphen and a short, descriptive title is required. Other optional identifiers that can follow in parentheses include FBMS number, FAIMS grant number and year.
State Abbreviation - Descriptive Title (optional FBMS/FAIMS/Year identifiers)
Example: CO - Butte Basin Wildlife Area Operations and Maintenance Project (F13AF00345/W-54-D/FY 2014)
- After entering the name, click the **Save** button.
- **Primary Agency:** search by name (enter first three+ letters).
- **Project Status:** use the Draft status to save as you enter information and change the status to Active when ready to submit project.
- **Project Start and End Dates**
- **Project Website** (optional)
- **Project Sensitive**: If the project contains sensitive information (such as private land owner information, sensitive species etc.), mark the project as sensitive. Note: This hides the exact project location on the TRACS mapper by buffering or extending the shape out to the next largest political boundary (e.g. county, state or country). Also keep in mind that projects marked "Sensitive" are not displayed in the Public Conservation Viewer.

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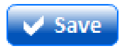
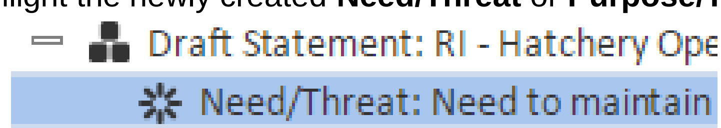
Step	Action
3	**Categories tab** Select the Project and Action Categories (can select more than one). Reference: Wildlife TRACS Action Levels Spreadsheet
4	**Contacts tab** Add the grant contact(s) such as the federal aid coordinator for your agency. If applicable, also add partners (such as a partner agency or person). If no matches are found in your search, select the **Add New Contact** button and fill out the form (full name, title, agency, phone and email are required). Mark the box for the Lead Contact.
5	**Description tab** Enter the abstract of the project, which should be written for the general public, in common language that is free of acronyms or jargon. Components from the Need section and Expected Results section make good references. Copy and paste available (Ctrl + C to copy, Ctrl + V to paste). Fix formatting if needed.
6	**Related Projects tab** Optional: add parent or peer related projects (must be in TRACs first).
7	**Groups tab** **Important Tip:** The project group will default to the primary group of the user who enters the project. Therefore, if you have permissions to enter projects for another group, then **<u>it is critical that you choose the correct group for that project</u>! The correct group is the agency responsible for the project (usually at the lowest level, such as the state agency or division).** For example, a WSFR regional coordinator who enters a project for a state needs to change the default group from the region to the state agency so that state users in that agency have permissions to edit the project. If the project is not assigned to the correct group, the staff at the state agency will not be able to edit, modify or report on their project. If the default group is not correctly listed as the responsible agency, click on the **Choose Group** button. Note: Groups are hierarchical with a parent-child relationship and are displayed in a tree structure within each parent group. Users from a parent group will have “inherited permissions” to all child groups. Click on the plus sign to expand each sub-menu. Then select the lowest group responsible for the project (such as the state agency or specific division), then click Done.

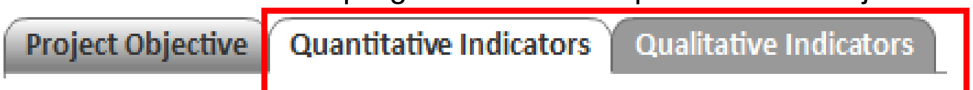
Step	Action
8	Click the **Save** button. 
9	Close the **Project successfully saved** box by clicking the **OK** button.
10	Click the Close button.  The Guided Process Tool opens.
11	Use the links on the right side to view, edit or add additional information. • **Zoom to Project Location** • **Edit Project Location** • **View/Edit Project Properties** • **View/Upload Project Attachments** • **View Project Summary Report** • **Copy Project**

Lesson 4 – Entering your Project Statement(s)

Step	Action
1	From the Guided Process Tool, click and highlight the **Enter Project Statements** option in the left pane. 2. Enter Project Statements
2	Click the **Create New Project Statement** button in the right pane. + Create New Project Statement **Note:** Do not click close without saving first! Fill in all the required fields on all tabs (e.g. Properties, Need Statement, Approach, and Expected Results) to activate the **Save** button. ✔ Save
3	**Project Statement tab** • **Name:** Use the standard naming convention: State Abbreviation - Descriptive Title (optional FBMS/FAIMS/Year identifiers) Example: CO - Butte Basin Wildlife Area Operations and Maintenance Project (F13AF00345/W-54-D/FY 2014) • **Principal Investigator:** enter the project leader or PI for research projects, search by name (enter first three letters) or add a contact if needed. • **Total Est WSFR Federal Cost:** Enter amount • **Total Est WSFR Non-Federal Match:** Enter amount • **Total Est Other Cost:** Optional (if entered, also fill out Other Funds tab) • **Grant Programs:** select from the drop down menu **Note:** The selected program will be displayed in the below table. Also, more than one program can be selected by repeating the process.
4	**Other Funds tab** Fill out if the Total Est Other Cost was entered on the previous tab.
5	**Need Statement tab** Enter Need Statement (can copy/paste). The need statement should explain why the project is necessary by identifying the issue/problem/opportunity and provide supporting evidence.

Step	Action
6	**Approach tab** Enter the Approach (can copy/paste). Describe the methods used to achieve objectives.
7	**Expected Results tab** Enter the Expected Results (can copy/paste). The expected results describe benefits of the project to users and/or species.
8	**Add'l Elements tab** (enter fields if applicable) • **General:** general information about the project, such as compliance information • **Useful Life:** expected life of capital improvements with reference to method used to determine it • **Program Income:** estimated program income amount and method
9	**Add'l Elements Cont. tab** (enter fields if applicable) • **Multipurpose Projects:** describes activities related to another grant or not related to a grant. • **Relationship with other grants:** relationship between the project and other work funded by federal grants. • **Timeline:** an estimated schedule of significant milestones towards completing the project.
10	**Scope Deviations** (optional) Describe changes in the scope that results as the project is underway.
11	When finished, click the **Save** button ✔ Save Then click the **Close** button ✖ Close

Lesson 5 – Entering your Objectives	
Step	**Action**
1	From the Guided Process Tool, Project Statement window: Click the **View/Edit Statement Objectives** link in the right pane.
2	Click the **Create SMART Objectives** button. 
3	 Select the **New Need/Threat** button to indicate the reason for the objective (if not related to a specific species/habitat). OR Select the **New Purpose/Target** button to indicate specifc species or habitat(s) targeted by the objective.
4	**New Need/Threat:** • Select a Level 1 **Need/Threat Type** from the drop downs that best describes the need for the objective(s), e.g. resource management need. **Note:** Level 2 & 3 are optional. • Fill in the Need/Threat description. OR **New Purpose/Target:** • Enter the Purpose/Target ID (e.g. 1 or A) • Enter the Purpose/Target Name • Fill in the Purpose/Target description. • Habitat: if applicable add the Broad Habitat Type 1 & 2 • Species: if applicable click **Edit Selected Species** and search for the species (specific search, taxonomic search or hybrid search), then click the **+** to add the species to the right side.
10	Click the **Save** button. 
11	Expand the project statement in the navigation pane by clicking the  next to the Statement name. 
12	Click and highlight the newly created **Need/Threat** or **Purpose/Target**. 

Step	Action
13	Click the **New Objective** button.
14	Fill in the required **Project Objective** fields. • **Objective ID** (follows a numbering system such as 1, 2, 3 or A, B, C or another state-used ID) • **Objective Name** • **Objective Statement:** best practice: enter as “(Action verb) _____ (how many) _____ (who or what) _____ (by when) _____.” Ex. Train 25,000 students in basic hunter education by June 30, 2015.
15	Go to the **Quantitative Indicator** or **Qualitative Indicator** tab to add one or more indicators to track progress on the completion of the objective.  • Quantitative Indicators are used for measurable outcomes (i.e. number of acres) • Qualitative Indicators are used for all objectives that do not have a measurable component (such as Administrative Support) and tracks whether it was completed or not (i.e. True or False)
16	• Click the **New Standard Indicator** button to select an existing standard indicator.  ○ Select the Category and Strategy to use a standard output built in TRACS (the standard output unit will display, such as acres) ○ Enter the **Planned Value** (how many are estimated to be accomplished, such as number of acres to be restored) ○ Enter the **Base Value** (starting point, usually zero unless the project is a continuation) ○ Enter the **deadline** (when you plan to complete this objective or the project end date) ○ Click **Add** • Click the **New Custom Indicator** button to add a new custom indicator. This option is used if a standard indicator is not available. ○ Enter the **Custom Output** (e.g. number of aquatic education classes taught) ○ For Quantitative Only: enter the Planned Value and Base Value. ○ Enter the Deadline ○ Click Add
17	Click **Save.** Add any additional objectives (and Need/Threat or Purpose/Target if needed). Then click OK.

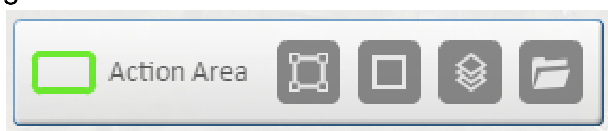
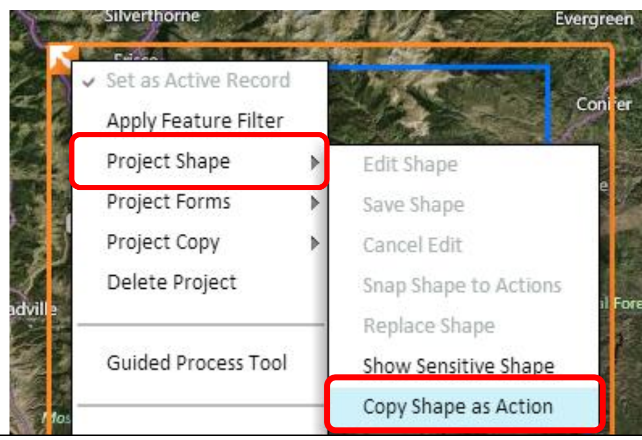
Lesson 6 – Generating your Project Proposal

Step	Action
1	From the Guided Process tool, click and highlight the **Generate Project(s) Proposal** option in the left pane. 
2	Click the **Workflow** link in the display pane.  Tip: This workflow must be completed separately for each project statement. To push multiple projects statements through the approval workflow at the same time, use the Workflow Manager (see chapter 20).
3	The “Current Project Statement Workflow Status” will display in the gray box at the top of the window. You can view a small version of the **Workflow Diagram** by clicking the **Workflow Diagram Link** located at the top right of the window. Select the **HTML** or **PDF** buttons to view or download a preview of the proposal. The system will check the project, statement and objectives to ensure that all required fields are complete. If all of the required fields are complete, the status will display as “valid”. If the status is invalid, an error message will display. This message will disappear once the error has been fixed.
4	To submit the project for review, select **Submit Project Proposal for Review** and click the **Apply Transition** button in the “Available Workflow Transitions” box at the bottom of the window.
5	The status at the top of the window will display as “Proposal Pending Review”. The federal reviewer is responsible for completing the review. He/she will then select “Approve Proposal” or “Do Not Approve Proposal” and click **Apply Transition**. Note: The system does not currently send automatic notifications, so you will need to follow-up with the reviewer to let them know when the project is pending their review. Likewise, the federal reviewer should contact the editor to let them know if the project is approved or not and if any revisions are needed.
6	Once the project proposal has been approved, it will display with the status “Reviewed Ready for Reporting” at the top of the window. The Proposal can be viewed or downloaded by selecting the PDF button. (Note: The HTML preview is no longer available).

Step	Action
7	If the data needs to be edited after the proposal has been approved, contact the federal reviewer to rescind approval. The federal reviewer can select “**Rescind Approval and Set to In Progress**” (and click **Apply Transition**) which allows the state editor to make any changes and submit the project for approval again. The other option is to select “**Rescind Approval and Set to Statement Pending Review**” which allows the federal reviewer to make changes.
8	Click the **Workflow Transition Log Tab** to view a log of executed workflow actions.
9	Click the **OK** button to close the **Workflow** form. The Guided Process Tool will display the current status of the proposal. To download a PDF, click **View Project Proposal(s).**

Lesson 7 – Adding a New Funding Source

Step	Action
1	Click the **Associate Funding Source** option in the left pane. **Note:** This step is performed by students in training classes only. In the production system, this step is performed by WSFR personnel. 4. Associate Funding Source
2	Click the **View/Edit Funding Source** link in the right pane. View/Edit Funding Source
3	Click the **Find Grant** button. Find Grant
4	Use the Search bar to enter the FBMS number, part of the funding source name, SAP/PO number, description or TRACS ID. Click on the **Advanced Search** to search by more fields. Click the **Search** button.
7	Click and highlight the funding source from the search results list.
8	Click the **Select** button. Select
9	Enter an **Est. WSFR Non-Federal** match as necessary. Funding Accounts Grant Program | Code | Funding Account | Est. WSFR Federal ... | Est. ... | Est. WSFR Non-Federal Match Sport Fish Restoration (Freshwater) | 9514 | Freshwater Sport Fish Restoration | 6300000 | 0 | 4150000
10	Go the **Grantees** and **Grantors** tab and fill in the Grantors and Grantees fields (who is giving the money, who is getting the money). Properties | Grantees and Grantors | Subgrantees | Third-parties | Contacts Fill in the other tabs if needed (Subgrantees, Third-parties, Contacts and Comments). **Note:** Contacts is used to enter the WSFR contact and grantee contacts
11	When finished, click the **Save** button Save Then click the **Close** button Close

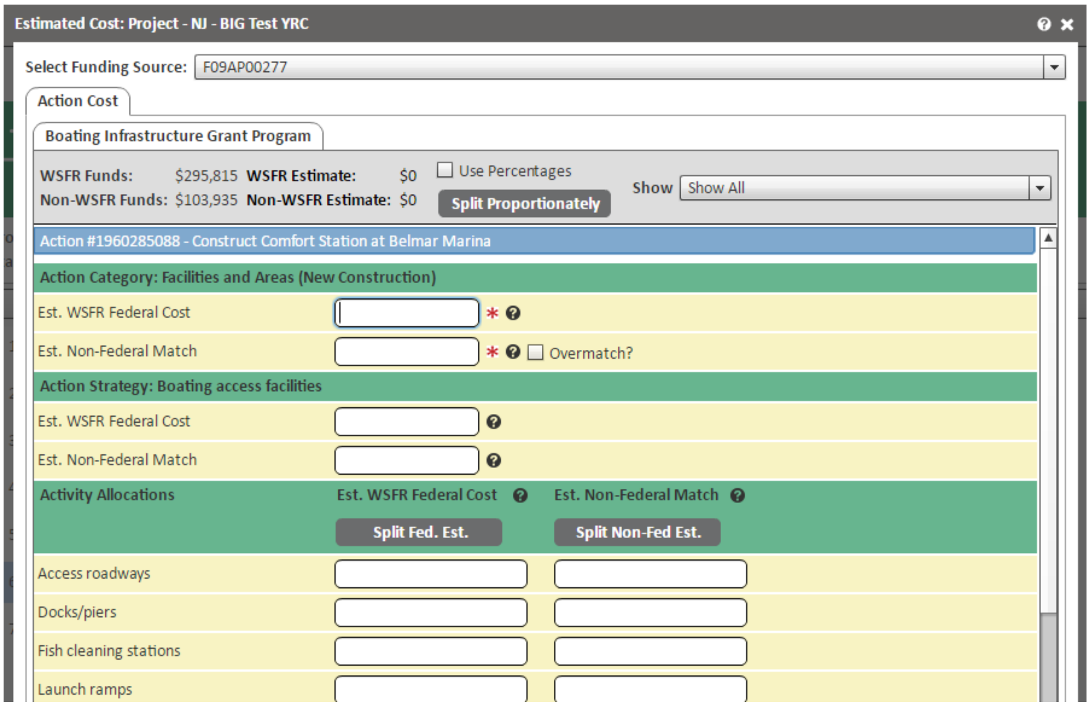
Lesson 8 – Mapping and Entering Action Data	
Step	**Action**
1	From the Guided Process Tool, click the **Enter Action Data** option in the left pane. 
2	Click the **Create New Action** button in the right pane. 
3	Select the drawing method for the action:  For more tips on the drawing methods, see the Navigation Guide or Module 2 Quick Reference Guide. To copy the project shape as the action shape, click on the blue project boundary to open an orange feature frame box around it. Click on the arrow in the upper left corner, select **Project Shape** and select **Copy Shape as Action**. 
4	Click **Save**. The action form opens.
5	**Properties tab** • **Action Name** • **Action Status:** The **Draft** status is used initially and allows you to save the form at any time. For interim reports, the actions that will be included must have a status of **Active**. For the final report, all of the actions must have a status of **Completed**. • **Action Start & End Dates:** reporting fiscal year will automatically calculate based on dates • **Spatial Data Quality:** select how accurately the action polygon represents the action

Step	Action
6	**Categories tab** (this tab is used for national reporting roll-ups) • **Category:** select from the drop-down menu (**Note:** available selections are based on the categories selected at the project level) • **Strategy:** select from the drop-down menu and fill in the **output box** (unit of measure is based on the selection) • **Activity:** more specific information is entered for boating or education
7	**Contacts tab** Add contacts and/or partners if needed (and mark the lead contact)
8	**Objectives Addressed tab** • **Project Statement:** select from the drop-down menu • **Objective:** select from the drop down-menu • **Indicator:** select from the drop down menu

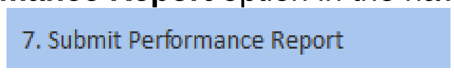
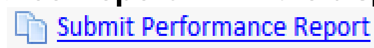
9	The reporting window opens.
	• **Date Reported:** enter the date reported (or the action end date)
	• **Value Reported:** enter the value reported
	  ○ Use the Copy Strategy Value button to copy the objective value
	  ○ If a box appears on the right, select **True** or **False**
	• **Results:** enter the results narrative (can copy/paste)
	• **Significant Deviations tab:** fill out if there were significant deviations

10	Click the **Add** button. The Objective/Indicator will appear in the bottom box. Click on it to see the **View**, **Edit** or **Delete** buttons.
11	**Note:** Actions may address multiple objectives and/or indicators. To add another selection, select from the statement, objective and indicator menus.
12	**Interim Measures Addressed tab** (fill out if applicable) An interim measure must be created first before it can be selected here.
13	**Habitat tab** (fill out if applicable) • **Current habitat:** select the current broad habitat (level 1 and 2) • **Desired habitat:** select the desired desired habitat (level 1 and 2)
14	**Species tab** (fill out if applicable) • In the **Species Directly Benefited** and/or **Species Indirectly Benefited** section, click the **Select Species** button to add a species. • Search for the species by specific search, taxonomic search or hybrid search, then click the **+** to add the species to the right side. Click OK.
15	**Related Actions tab** Optional: add parent or peer related projects (must be in TRACs first).

Lesson 9 – Entering Estimated Costs

Step	Action
1	Click the **Enter Estimated Cost** option in the navigation pane. 6. Enter Estimated Cost
2	Click the **View/Edit Project Estimated Cost** link in the display pane. View/Edit Project Estimated Cost
3	Estimated Cost form: • **Select Funding Source**: select if multiple funding sources • **Action Cost tab** (each grant is on its own tab) • Under the **Action Category** section, fill in the estimated cost breakdown for the **WSFR Estimate** and **Non-WSFR Estimate** fields • Fill out the **Action Strategy** and **Activity Allocations** if available  **Note:** To apportion costs evenly between actions, use the **Split Costs** button. Click **Use Percentages** to enter custom percentages.
4	When finished, click the **Save** button Save Then click the **Close** button Close

Lesson 10 – Submitting your Performance Reports

Step	Action
1	Click the **Submit Performance Report** option in the navigation pane. 
2	Click the **Submit Performance Report** link in the display pane. 
3	The current Performance Workflow Status box will display the current status starting as **In Progress**. • You can view a small version of the **Workflow Diagram** by clicking the **Workflow Diagram Link** located at the top right of the window. • Select the **HTML** or **PDF** buttons to view or download a preview of the final report.
4	Click the **View All Addressed Objectives** to view the addressed objectives. This is a good place to double check that everything is valid and ready for the final report. • Select an objective to view validation information in the lower half of the screen. • Errors will appear in red and will need to be fixed prior to proceeding. Warnings appear in yellow and do not have to be fixed prior to proceeding. • Click **Done** to close the window.
5	When the FINAL report is due, select **Set Final Report Due** and then click **Apply Transition.** (Keep in mind that Interim Reports are not generated on this window. Go to the Workflow Manager to generate an interim report (see Chapter 20 for more information).
6	Once the report has been set to Final Report Due, the status will display at the top of the window. In the **Available Workflow Actions** box (lower half of the screen), you have the option to select **Return to In Progress** if the final report is not yet due. When the final report is ready for submission, select **Submit Final Report for Review** and click **Apply Transition.** Note: Any warnings (in yellow) or error messages (in red) will appear at the top of the screen. Warnings, such as the one displayed below, are informational and may not require any changes.
7	The status at the top of the window will display as “Final Report Pending Review”. The federal reviewer is responsible for completing the review. He/she will then select “Approve Final Report” or “Do Not Approve Final Report” and click **Apply Transition**.

Step	Action
	Note: The system does not currently send automatic notifications, so you will need to follow-up with the reviewer to let them know when the final report is pending their review. Likewise, the federal reviewer should contact the editor to let them know if the final report is approved or not and if any revisions are needed.
8	Once the final report has been approved, it will display with the status "Final Report Approved" at the top of the window. The final report can be viewed or downloaded by selecting the PDF button. (Note: The HTML preview is no longer available).
9	If the data needs to be edited after the final report has been approved, contact the federal reviewer to rescind approval. The federal reviewer can select "**Rescind Approval and Set to Final Report Due**" (and click **Apply Transition**) which allows the state editor to make any changes and submit the project for approval again. The other option is to select "**Rescind Approval and Set to Final Report Pending Review**" which allows the federal reviewer to make changes.
10	Click the **Workflow Transition Log Tab** to view a log of executed workflow actions.
11	Click the **OK** button to close the **Workflow** form. Note: The status of the workflow displayed on the Guided Process Tool will not update until you close and re-open the window.
12	Once the status is **Final Report Approved**, the user who created the project will need to go back into the Guided Process Tool to mark the project as "complete**"**. From the Guided Process Tool, select **1 Project Data** on the left side. Then select **View/Edit Project Properties** on the right side.
13	In the Project Status box, select **Completed.** Then click **Save** and **Close**.