<table>
<tr><th colspan="2">Understanding Legacy Grant Reports</th></tr>
<tr><td>Steps</td><td>Action</td></tr>
<tr><td>1</td><td>Decipher grant program and the activities from the grant ID and project name on the performance report. Review the “What’s in a Performance Report File Name” examples below.

Legacy Grant Naming Convention: State Abbreviation Funding Source Number (FAIMS Identifier) Project Name
Example: “SD F12AF0094 (F-84-D-25) Intensive Fisheries Management on Selected Lentic Waters”

The yellow-highlighted prefix of “SD” is the state abbreviation.
The underlined text starting with F is the funding source number.
The green-highlighted prefix “F” in the FAIMS Identifier indicates the grant program.
The blue-highlighted letter “D” indicates the activity.
The project name provides more detail.

Therefore, the file name identifies that this as a Sport Fish Development grant on South Dakota Lentic Waters. Use this information to complete the Project Name, Categories, and Description in Task 1 of the Guided Process tool.

<table>
<tr><th>Prefix</th><th>Grant Program</th></tr>
<tr><td>W</td><td>Wildlife Restoration</td></tr>
<tr><td>F</td><td>Sport Fish Restoration</td></tr>
<tr><td>T</td><td>State Wildlife Grants (SWG) Traditional</td></tr>
<tr><td>U</td><td>SWG Competitive</td></tr>
<tr><td>E</td><td>Endangered Species</td></tr>
<tr><td>FW</td><td>Sport Fish and Wildlife Restoration</td></tr>
</table>
<table>
<tr><th>FAIMS Code</th><th>Activity</th></tr>
<tr><td>D</td><td>Development</td></tr>
<tr><td>HM</td><td>Habitat Management</td></tr>
<tr><td>T</td><td>Technical Assistance</td></tr>
<tr><td>L</td><td>Lands Acquisition</td></tr>
<tr><td>R</td><td>Research, Survey or Monitoring</td></tr>
<tr><td>B</td><td>Boating Access</td></tr>
<tr><td>E</td><td>Education and Shooting Ranges</td></tr>
<tr><td>C</td><td>Coordination</td></tr>
<tr><td>DB</td><td>Development, Boating</td></tr>
</table>
</td></tr>
<tr><td>2</td><td>Read the performance report, front to back, before entering it into TRACS. This will help you understand what the grant is about (who, what, why, where, and how many) prior to updating the TRACS Legacy module.</td></tr>
</table>

Locating a Legacy Project	
Steps	Action
1	Login to TRACS and select the **Legacy Data** button from the Dashboard window.
2	Select the **Search Grants** button (preferred method). Note: The Project Search option is available as well, which will open the Guided Process Tool search window.
3	In the Search box, enter part of a funding source SAP/PO Number, FAIMS Agreement name or description (e.g., WA-W-83-HS-41 or F11AF00115). Click **Search** at the bottom left. Search Tips: • First try searching by using the FAIMS ID (referred to as the SAP/PO number), ex. FW-6-C-73. Make sure to enter with the dashes. The search will work with or without the State Abbreviation first. • TIP: If you don't find the grant, erase the last section of the grant ID and try the search again. If you still don't find the grant, erase the next section and so on to try to expand your search. • Another option is to search using the funding source number (example: F10AF00706). • If the grant is not located, click on the Advanced Search button in the lower right of the window. Use the additional information from Step 1 in this guide to locate the grant. Search using the State ID, grant program and/or project description. (The start and end dates search is not fully functional, so it may not work).
4	Select the **Search** button located in bottom left hand corner to open a list of results. Click on the correct funding source to highlight it in blue, then click **Select**.
5	The legacy project list will open. On the left side panel, the conversion details will display including the FAIMS Grant Agreement, PO/Award Number, Funding Source Name, Start Date and End Date. On the left side panel, the conversion details will display including the FAIMS Grant Agreement, PO/Award Number, Funding Source Name, Start Date and End Date. • You may find multiple records or segments associated with your grant. You can sort them by clicking the Start Date column header. • What is a segment? For multi-year projects, or grants that were amended after approval, additional FAIMS entries were created. If multiple records are associated with your assigned report, it is up to you to find the original grant proposal entered from the list. • Note: The duplicate warning screen is displayed if there were multiple project records in FAIMS with a non-unique Project ID and Name. In this case, the legacy project serves as a placeholder for multiple grant segments. The project with the most recent open grant segment will appear in the Active list.
6	Click the "pencil icon" in the Controls column to the right of the appropriate project/segment to open the Guided Process Tool so you can update it. You may find multiple records or segments associated with your grant. You can sort them by clicking the Start Date column header. Click the "pencil icon" in the Controls column on the right to edit the appropriate project.
7	Once the correct project and segment has been selected, proceed to update the record.
	Note: If you are unable to locate the grant or project, it may not have been converted over from FAIMS and may need to be entered manually on the mapper.

Completing a Legacy Project	
Steps	Action
1	Once the appropriate project has been selected from the legacy search, the Guided Process Tool will open. The window should open on **Task 1. Enter Project Data** on the left. Select **View/Edit Project Properties** link on the right.
2	On the Properties tab update the following: • **Project Name:** Verify that the full project name is listed and modify if needed. It should have the standard naming convention: a two-letter State/Territory abbreviation followed by a hyphen and the descriptive title. Other identifiers can follow in parentheses including the FBMS number, FAIMS grant number and year. o **State Abbreviation - Descriptive Title (FAIMS grant ID/Year identifiers)** o *Example: NE – Habitat Restoration on WMAs (F10AF00706, W-90-HM-1)* o Note: updating the name using the naming convention is very important because it makes it easier for state and federal staff to find the project in the future. • **Agency:** Click the **Search for Legacy Agency** button to auto fill the agency (it should match the appropriate State Fish and Wildlife Agency listed above it). Alternately, type the first three letters of the state name into the search box and select the agency from the drop down options. If the agency is not lised, use the Create New Agency button to submit a request to add the agency. • **Status:** Verify Project Status as Active. • **Start and End Dates:** Verify the dates are correct and modify if needed.
3	On the Categories tab, verify that the categories are listed appropriately (may be populated from the legacy conversion). If not, select the **Project Categories** and **Action Categories** that are appropriate (select as many as are relevant to the grant report). Categories are used for national reporting and they are very important for data collection and analysis across and within regions. Note: The categories and strategies selected on this tab will be the only selections that are available when you get to the action form, so it is very important that you select all applicable categories relevant to the work being reported.
4	On the Contacts Tab, verify the contacts are listed correctly. If any are missing, use the **Find or Add Contact** button to add the grant contact(s). If the contact is not found, use the **Add New Contact** button (only if you have their full name, email address, phone number and agency name available). Check the box for the **Lead Contact** (even if there is only one contact). Add partners if listed, such as a partner organization or agency in the bottom section.
5	Go to the Description tab and enter the description of the project. • Information may be available from the performance report for a direct copy and paste into this section. • More often you will need to abbreviate or expand an existing paragraph to create a suitable abstract by familiarizing yourself with the **grant objectives and approach found in the original document**. Optionally, look at "**Task 2. Enter Project Statements**" tab on the left and click on the links on the right for

<table>
<tr><td></td><td>“View/Edit Statement Properties” and “View/Edit Project Objectives”.
Describe the grant in 2 to 4 sentences (who, what, why, how many, and where) without scientific jargon or acronyms (spell out if possible). Use “elevator speech”, in other words a brief high level overview of the project written at a level that a 6th grader would understand.
Note: The Description entered within this step will be part of the permanent record and will be viewable from the Public Portal for TRACS.</td></tr>
<tr><td>6</td><td>Optional: fill out the Related Projects tab if there are other projects in TRACS that are related to this one. This tab may be be auto-populated from the conversion from FAIMS.</td></tr>
<tr><td>7</td><td>The project group will be listed as the regional WSFR group that owns the project.</td></tr>
<tr><td>8</td><td>Click Save and then click Close to return to the Guided Process Tool.</td></tr>
<tr><td>9</td><td>Optional: Take a look at the Project Statement and Objectives to familiarize yourself with the project details that came over from FAIMS. Although many of the fields will be greyed out or blank and will not be editable, there may be useful details about the project that will help you complete the actions for the project.
To view the Project Statements: navigate to 2. Enter Project Statements in the Tasks Panel. Select the View/Edit Statement Properties link in the right pane for each statement. Note: There will be multiple Project Statements for each FAIMS accomplishment (FAIMS Project type will display as “FAIMS Accomplishment”).
Click on the View/Edit Statement Objectives (Narrative) link to see the objectives that came over from FAIMS.</td></tr>
<tr><td>10</td><td>Optional: Take a look at the Associate Funding Source section (should be auto populated from the conversion).</td></tr>
<tr><td>11</td><td>Select 5. Enter Action Data on the left side of the Guided Process Tool. A legacy project must have at least one action.

Action Tips:
Each action is used to document the work that was done. To determine what types of actions and how many actions need to be created, take a look at the objectives and results in the grant report (and in the Statement Objectives in TRACS)
Use the Action Levels Spreadsheet to cross reference the category/strategy.
Results and objectives may be combined into one action if they are related to the same type of work (e.g. Habitat Management or Outreach, etc.)
If separate costs are listed for each objective/result, they should each be added as separate actions.
If available, existing actions for this project may display on the right side (scroll down to look at all of them). For each existing action, click View/Edit Action Properties to complete the information.

If an action is missing, click the Create New Action button. Create as many actions as required for capturing the work reported by the grantee.</td></tr>
<tr><td>12</td><td>For each action, verify and fill out any missing information in the required fields. On the Properties tab fill out:
Action Name: should summarize the on the ground activities. In some cases, it may be appropriate to utilize the Project name as the Action name. In other</td></tr>
</table>

	cases, where multiple Actions are needed, a unique Action name will need to be created that reflects the type of work performed (see example in the screenshot below). • **Status:** leave as “Draft” or “Active” until all of the data has been entered (then change the status to “Completed”). • **Action Start and End Dates:** enter the specific dates if available, otherwise use the overall project dates.
13	On the Categories tab, fill out the following: • **Category and Strategy:** Select from drop down menus. Categories and Strategies will be carried over from data entered on the Project Properties form. • If a box appears to the right of the strategy, enter the value if possible (or enter a 0 or 1 as a default).
14	Click the **Contacts** Tab and verify the contacts are listed correctly as the project leader(s) and update if needed.
15	Click on the **Objectives Addressed** tab. • Click on the **Project Statement** drop down and select the appropriate Project Statement. • Click on the **Enter Progress** button to enter the results. • **Date Reported:** enter if available or use the end date of the project. • **Results:** fill in the results information for this action, which can be copied and pasted directly from the performance report. • **Significant Deviations:** if the report contains this information, copy and paste it to this tab. • Click the **Add** button to save the results.
16	Fill out the habitat and/or species tab ONLY if applicable. For more information, visit the Habitat and Species chapter.
17	Click **Save** and **Close** to return to the Guided Process Tool.
18	Repeat steps 11-17 to verify or add all actions.
19	After adding all of the actions, go to task “**6. Enter Estimated Costs**” on the left side of the Guided Process Tool. Click on the **View/Edit Project Estimated Cost** link on the right. • If the performance report includes financial information related to Action Categories, fill in the dollar amounts for each action (see screenshot below). Tip: look for sections in the grant document labeled “budget narrative” or “project costs”). • If costs are not listed on the report, click the **Split Proportionately** button. This will evenly split the costs across all actions. • If the non-federal match is over and displays a red error message, check the **Overmatch** button. • Click **Save** and **Close.** Tip for Advanced Users (contact your supervisor for more information): If the report does not differentiate the WSFR federal costs from the non-federal match dollars, use the percentage rule of thumb to calculate the federal/non-federal amounts from the total. • Grant Programs except SWG: 75% federal and 25% non-federal. • SWG (State Wildlife Grant) Program: 65% federal and 35% non-federal. (In some cases, the grant may list a different split that should be used such as

	50/50)
20	Return to task "**1. Enter Project Data**" on the left and click on **View/Upload Project Attachments**. Save an electronic copy of the grant proposal/report to your computer and upload it as a project attachment. Then delete the local copy on your computer for security purposes.
21	Then click on the **View/Edit Project Properties** link on the right. • On the Properties tab, change the Status to **Completed** from the drop-down menu. • Click **Save** and **Close**. Then close out the project by clicking on the x in the upper right corner of the Guided Process Tool.

For additional information on **Updating Legacy Land Records** and **Creating a Legacy Project on the Mapper**, please reference the User Guide on the TRACS KMS website.