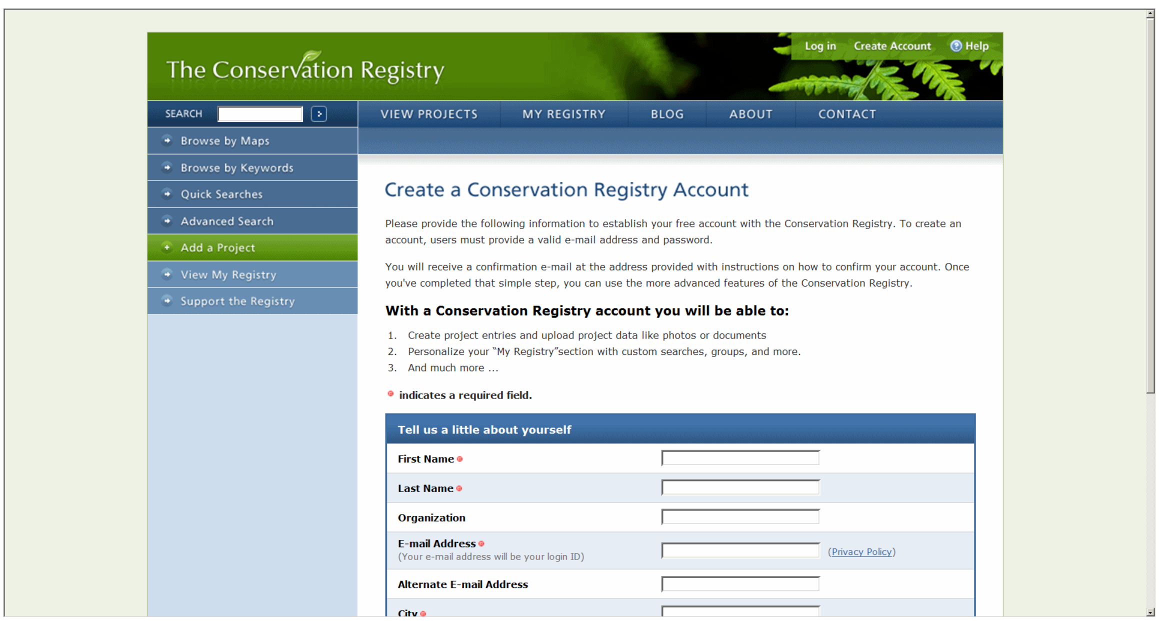
Adding a Project Instructions

Create an account

Click on the “Create an Account” link in the upper right hand corner of the home page.

To create a new account you will need to provide your name, e-mail address and location (city, state, zip). An email confirmation will be sent to you and you will need to activate your account in order to log-in. Once activated, log-in to your account.

> **If you have created an account but have not received an email confirmation, please check your junk mail. If you still cannot find it, please contact Gina LaRocco at glarocco@defenders.org or Kassandra Kelly at kkelly@defenders.org.**



Add a project.

You can enter your project at the ***WRC portal*** http://ncwrc.conservationregistry.org or through the main Registry homepage linked at the top of the web page.

Click on the "Add a Project" link in the menu bar along the left side of the web page (under the WRC logo). You will be taken to the initial instruction page and you will see two options:

1. <u>Create a New Project</u>

   Creating a new project allows you enter information about your project and; at the end of the process you can publish the project to the Registry or choose to save it as unpublished until you are ready for it to be publicly viewed.

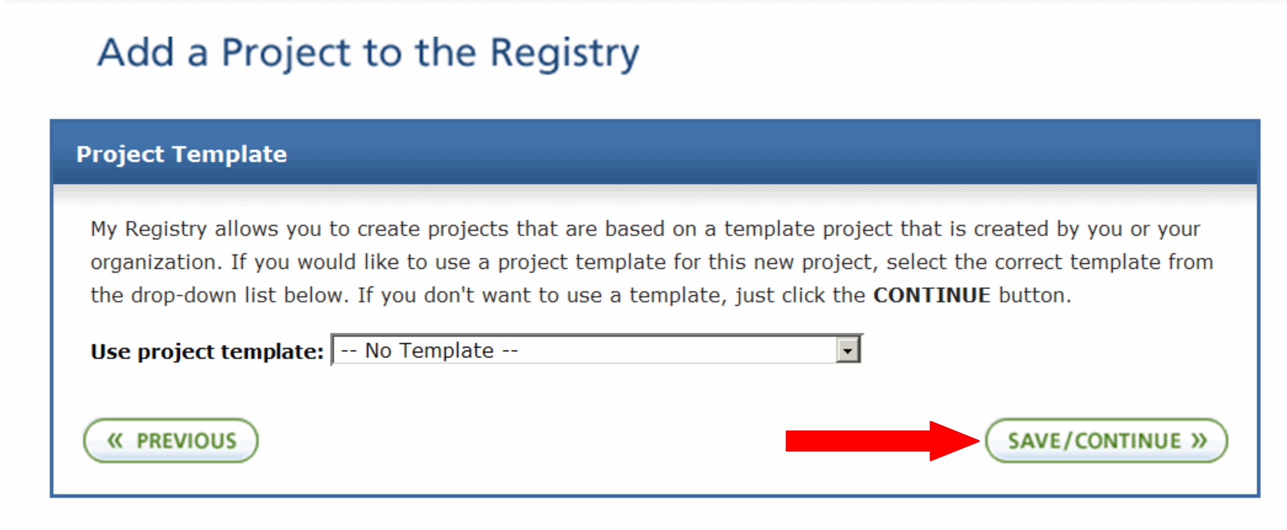
2. <u>Create a New Template</u>

   Creating a new template allows you to create a record that you can share with other users so that identical information can be entered automatically. It helps reduce the amount of time needed to enter a project and improves accuracy.

Once you choose your form of data entry, you will be taken to the first tab which asks General Information about your project.

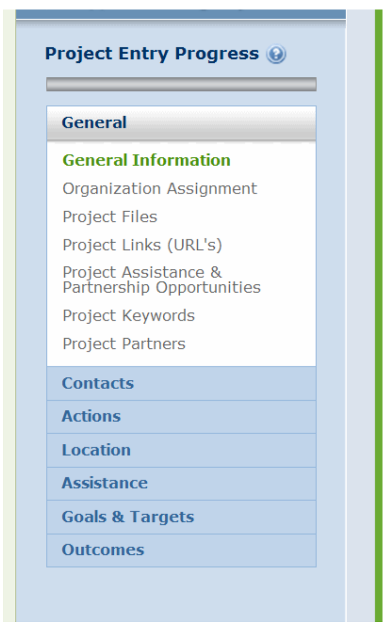
> **We only require you to enter a <u>project title</u>, <u>description</u>, <u>action(s)</u> and <u>location</u>, with the caveat you can suppress the location from public view**, but we prefer you fill out as much information as you can about your project.

Creating a new project screen:



To move from one screen to the next, click "save/continue" in the bottom right-hand corner (see red arrow). Information will be saved as you navigate from page to page.

After your project has been entered, you may edit the information. You can also navigate between sections by clicking on the section name in the menu box along the left side of the screen (shown below).

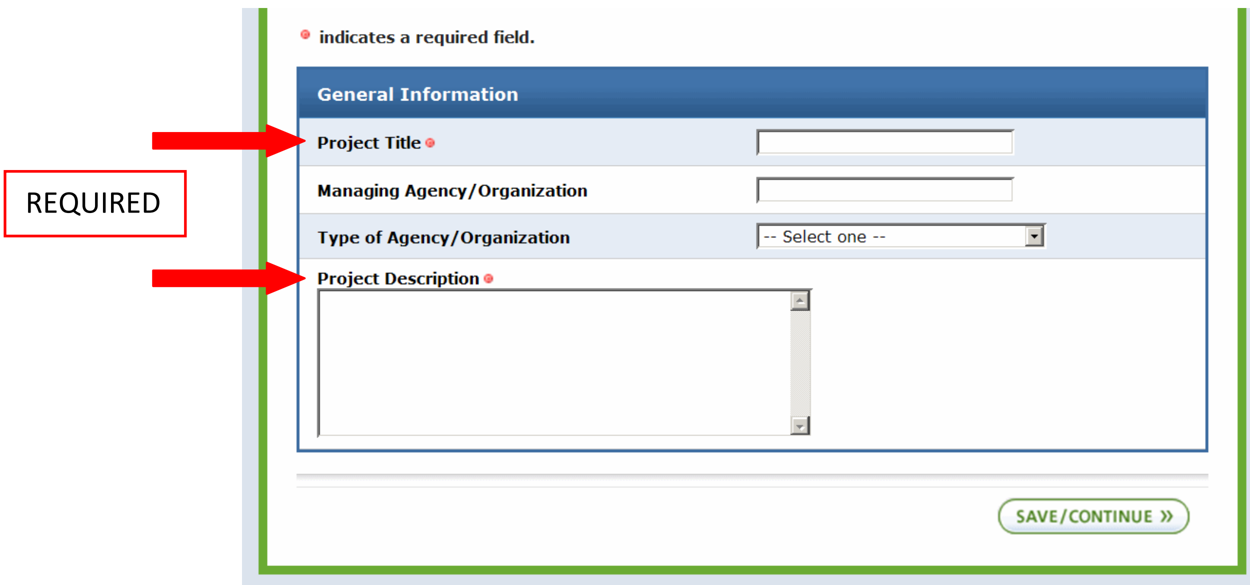


Step 1: General Tab

Project Title. This is required information. If you would like others to be able to easily find your project via a text search, be sure to use familiar terms, such as the name of the site or other identifying characteristics.

1. A project can be a single action on one site; multiple actions on a single site; or multiple actions on multiple sites. We leave it up to each user to decide how they want their project captured on the Conservation Registry.

This section also asks for information about the project manager. A project manager is a representative of the managing organization who can edit the project and respond to queries from other users. As you begin to type the name of your agency or organization, the system will generate a type ahead list of other names that have been entered in the Registry. If you see your organization or agency's name, choose it from the list and then identify the type of organization or agency it is.



Project Description: **this is required information**. The last part of this section is a text box that allows you to provide a description of your project. You can be as brief and general or as specific as you would like. Specific details will help other users understand your project and long-term goals.

2. Telling a compelling story about your project makes it more interesting to potential funders and volunteers.

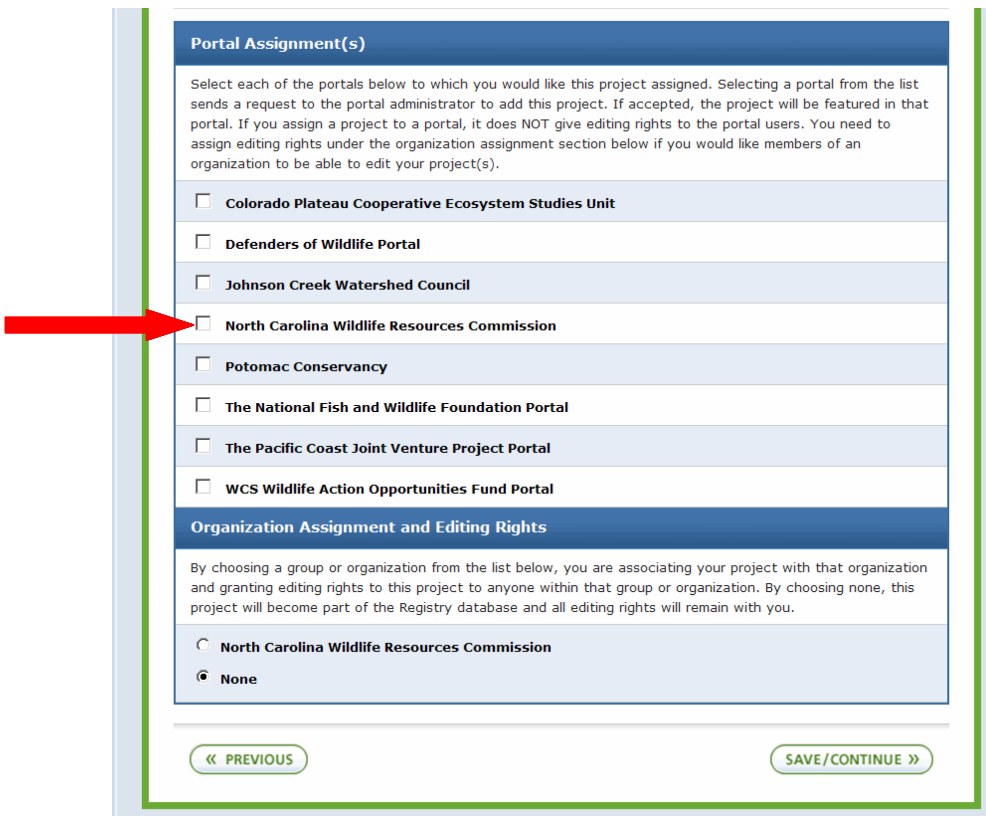
Step 1: General Tab (continued)

Organization assignment: This section requires 2 separate actions: assigning your project to a portal and designating editing rights to others.

1. *Portal Assignment*: A portal is a landing page with customized views into The Conservation Registry that pre-filter the searches, maps, and other functions in order to highlight the organization's projects. The benefit of a portal is that it represents specific regional interests. Portal administrators have the ability to approve project assignments to their portal.

3. The ***WRC portal*** is an open portal, meaning anyone can assign their projects to this portal. Assigning your project to the ***WRC portal*** allows your project to be highlighted on the portal home page and associates it to quick search links for projects that need volunteers, funding, equipment, or other special needs. NCWRC administrators have the ability to review and approve assigned projects and email the primary project contact if there are any questions or problems with the information.

Click in the check box to select North Carolina Wildlife Resources Commission.



2. *Organization:* If you are an individual and you do not belong to an organizational account, this section will only provide you with the option of "none." If you or your organization has already created an organizational account and you would like to give other members the ability to edit the project(s) you enter, you can choose the appropriate organization listed in this section. However, if you want to keep editing rights to yourself, you can choose "none" and no one, unless you give them your login information, will be able to edit your project.

Step 1: General Tab (continued)

You can change editing rights at a later time by editing your project when you visit the "My Registry" tab (menu bar along top of web page). This means that you can be part of an organizational account, but still have the ability to select which projects you allow other members of the organizational account to edit.

Click "Save/Continue" to proceed to the next data entry page.

Project Files: You are not required to add any files; however, if you have any project documents, reports, or data sheets you would like to attach to your project for other Conservation Registry users to view you may upload them here. You can upload pictures, Word documents, Excel spreadsheets, PowerPoint presentations, etc. Simply click "add" and browse your computer for the file you would like to attach, provide a description and click "upload." If you want to attach another file, click "add" and go through the same steps.

4. You can add as many files as you want; the only limitation is that each file cannot exceed **20 MB**.

Click "Save/Continue" to proceed to the next data entry page.

Project Links: You are not required to add a link; however, if you would like to point users to other web sites where they can find more information about your project, organization, or any other relevant information you can share it here. Click "add" and copy and paste the URL or web address of the web site into the address field and provide a short description for it. Be sure to include all of the information at the beginning of the URL address. Click "save link" and if you'd like to add more, simply click "add" again and repeat the process.

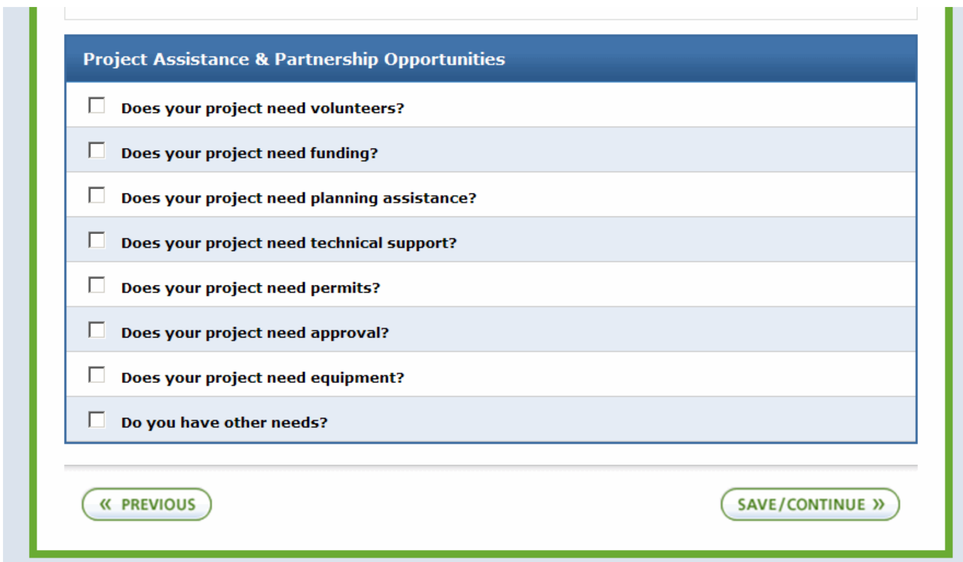
Click "Save/Continue" to proceed to the next data entry page.

Step 1: General Tab (continued)

Project Assistance and Partnership Opportunities: You are not required to add this information; however, if your project has any needs that you would like to let Registry visitors know about you can add them here.

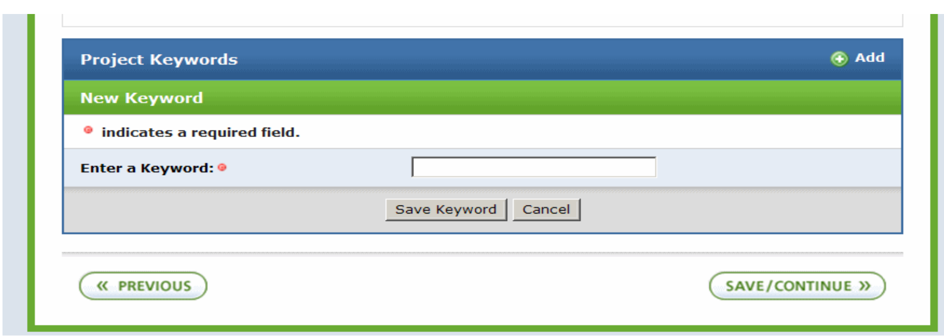
<u>5.</u> Project needs include volunteers, funding, equipment, permits, or in-kind requests. Providing details in your description will help others better understand how they can provide assistance or become involved.

Once you click a check box, you will have the opportunity to describe more about your need. And, you can add as many needs as you would like. Projects that identify needs will be part of the "quick search" feature on the ***WRC portal*** homepage that highlights these projects and makes it very easy for other Registry visitors to find.



Click "Save/Continue" to proceed to the next data entry page.

Project Keywords: Keywords are certain terms associated with your project such as locations, species, action type, funding program, even managing organization. Adding keywords allow anyone searching for that term to easily find your project. As you begin to enter a keyword, a type ahead feature will show options that have already been entered in the Registry. If you see your word, choose it from the list. For instance, if you are restoring a wetland's hydrology, you can choose to attach the keyword "wetland" to your project and all other projects that use this term will show up in the keyword search.



Step 1: General Tab (continued)

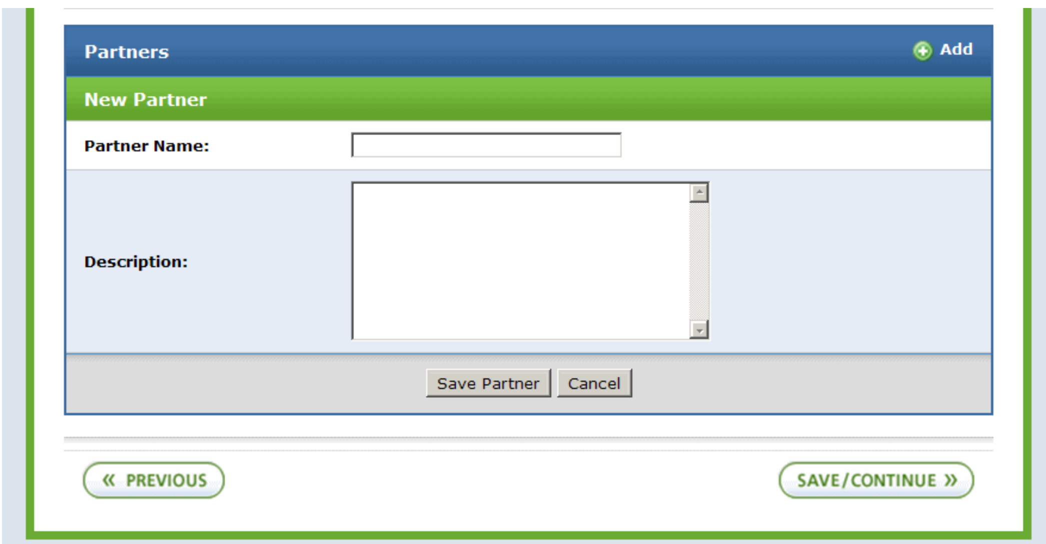
For North Carolina partners, if your project is part of the *Green Growth Toolbox* or *Wildlife Friendly Development*, please use these as keywords so they will be part of the search results. As you begin to type the name, you might see a type-ahead list pop-up. If you see either term already listed, please choose it. Otherwise, type it out and other users that come in later will be able to choose it from the list since you already entered it.

It is important to be as consistent as possible for searching purposes.

You are not required to add keywords. Click "Save/Continue" to proceed to the next data entry page.

Project Partners: Do you have partners in the project that you would like to acknowledge? This section provides you with the opportunity to do so. Click "add" to enter the partner's name and the details of their participation. You can add as many partners as you like.

Please note that the "Assistance" section in the data entry process gives you the opportunity to identify funding you have received for your project, as well as opportunities to identify individuals, organizations and/or agencies that have provided other kinds of assistance, such as in-kind help.

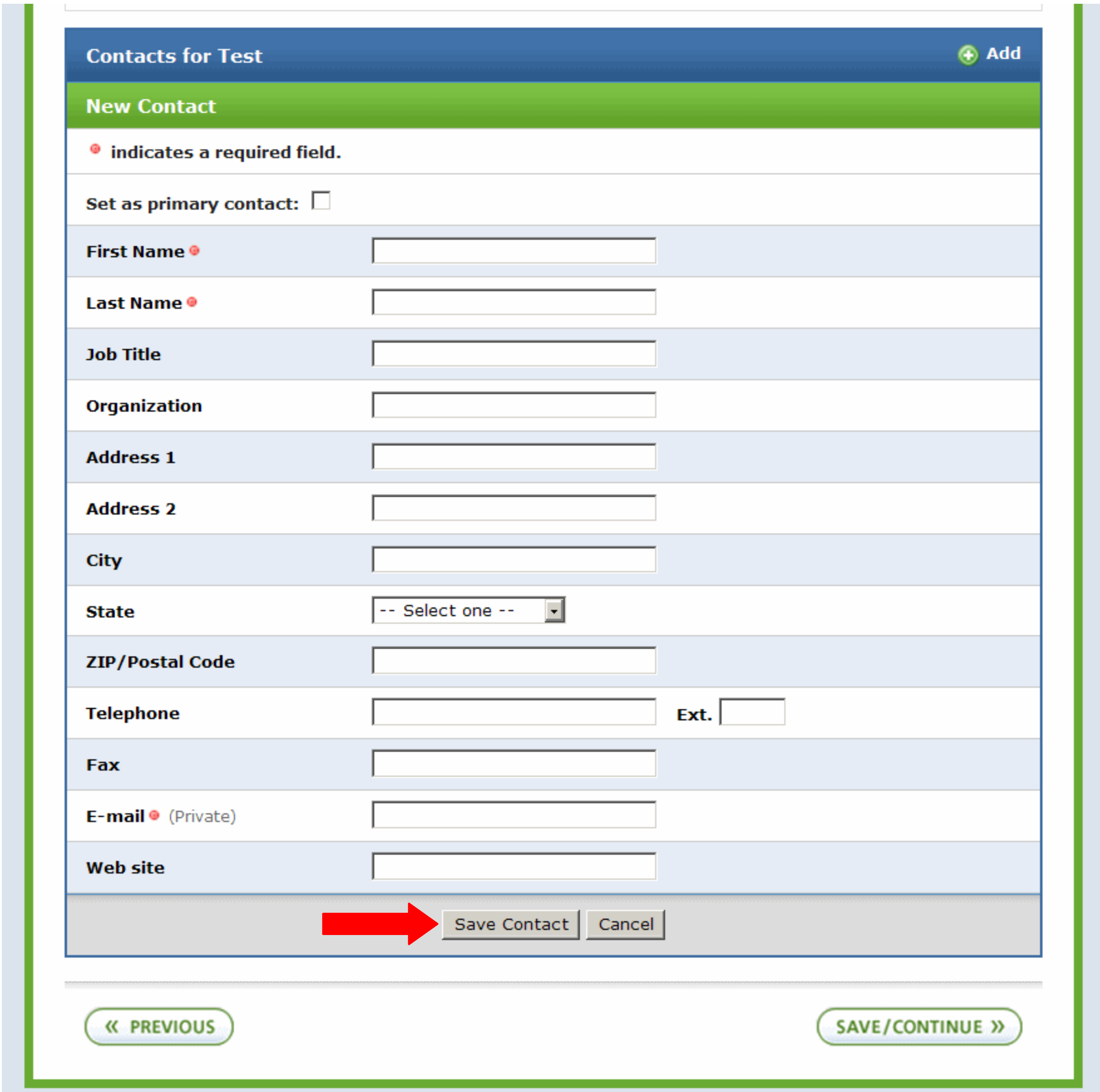


You are not required to add partners.

You are now finished entering data in the General Information section. Click "Save/Continue" to proceed to the Contacts data entry page.

Step 2: Contacts Tab

Add Contact: If you would like a project contact to be someone other than the account holder, you will need to fill out this section and choose the option to "set as primary contact." If a user is viewing your project, they will only see the name of the contact with a link to send an email. No email address is ever publicly shared. **No personal information will be shared with the public**.



Once you have provided the contact information, choose "save contact" (see red arrow).

You can add more than one contact for a project, but you will need to indicate who the "primary contact" is in the check box provided. The primary contact name will show up on the project detail page.

You are now finished entering data in the Contacts section. Click "Save/Continue" to proceed to the Actions data entry page.

Step 3: Actions Tab

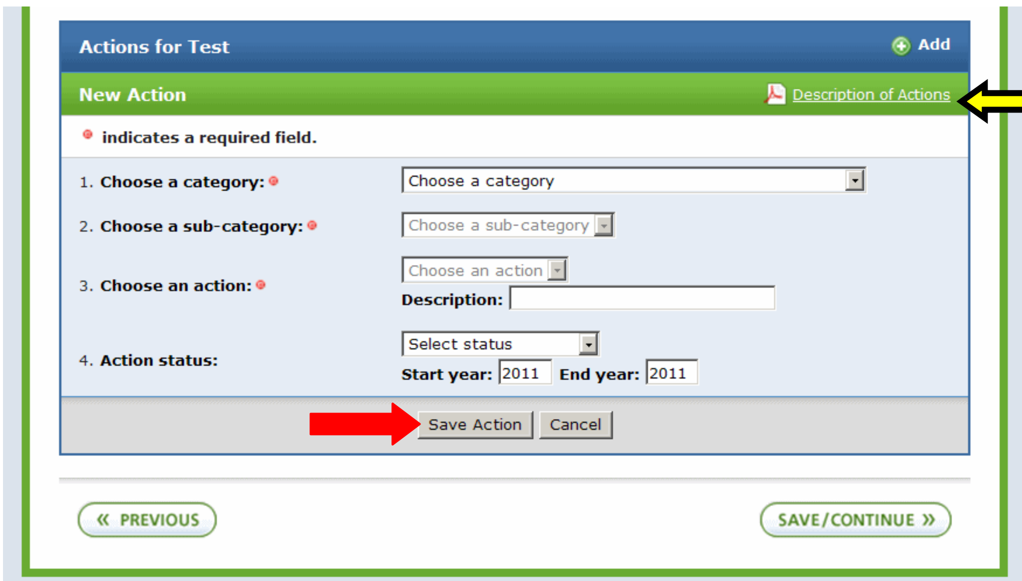
Actions: **This information is required.** The actions page is where you indicate what is actually happening on the ground in your project. There are three action categories available for selection:

1. Habitat restoration and management (removing invasives, restoring a wetland, putting up riparian fencing, species re-introduction, etc.);
2. Enhanced conservation status (easements, acquisitions, stewardship agreements, etc.); and
3. Monitoring, research and education projects tied to a location.

Choose “add” and you will be presented with fields, the first asking you to choose one of these categories. You can add as many actions as you need.

<u>*6.*</u> A project can be a single action on one site; multiple actions on a single site; or multiple actions on multiple sites. We leave it up to the user to decide.

REQUIRED



If you want to see a full list and description of actions, click the PDF link “Description of Actions” in the upper right corner of the green bar (see yellow arrow).

Once you have chosen an action category, you will be presented with list of sub-categories to choose from. Choose the sub-category that best fits your “action” and once chosen, you will be presented with a list of additional sub-actions to choose from.

Once the action category/categories have been selected, you have the opportunity to choose the status. Have you completed the action? Or are you proposing it? Is it an ongoing or recurring action? Apply dates as you deem necessary.

Choose “save action” when you are done (see red arrow). If you want to add more actions, simply click “add” and repeat the process. You can add as many actions as you need.

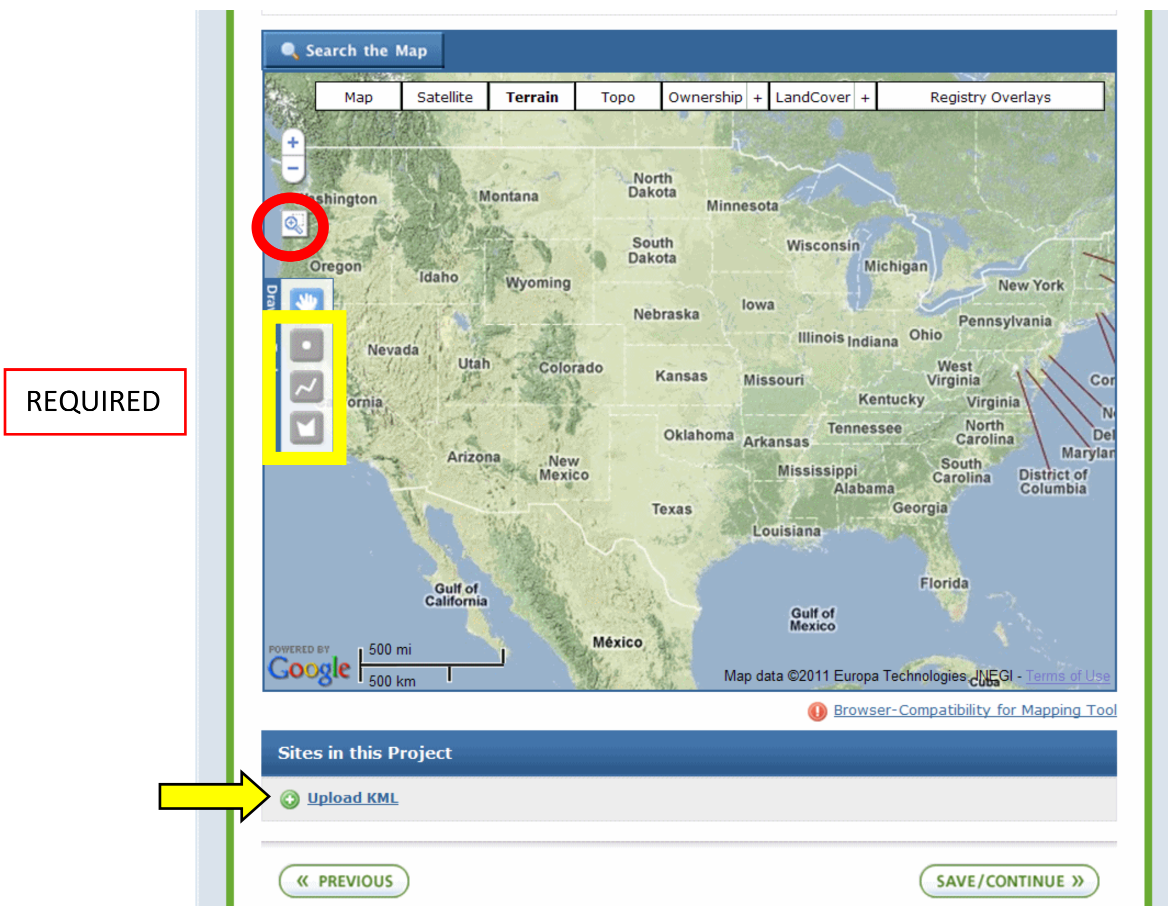
You are now finished entering data in the Actions section. Click “Save/Continue” to proceed to the Location data entry page..

Step 4: Location Tab

***Location:* This is required information*; however, you can choose to prevent public view if the location is considered sensitive. .* You can draw multiple sites for your project and use any of the tools described below; you are not limited in choosing one of the tools (shape, point or polygon) to draw all of your project sites.

1. To use the map tools: Zoom into the location of your project site on the map by selecting the magnifying glass icon from the left side of the map (red circle), then click and drag on the map to zoom into your project location.

    - Choose the shape icon on the left hand side of the map (yellow box) to draw a polygon; choose the point to plot your project as a point; or if you are doing in-stream restoration or riparian work, choose the line tool and indicate a buffer size. After selecting the shape icon, click on the map location to designate a point or to begin drawing a line or polygon feature. Double-click the last point of a line or polygon feature to finish the drawing.



2. To upload an existing file: If you already have a shape drawn for your project or a database with geographic reference info (lat/long), you can convert the file(s) to a KML format and upload it by clicking on the "Upload KML" button below the map (see yellow arrow).

    - If you are interested in learning more about creating KML files, visit http://code.google.com/apis/kml/documentation.

Step 4: Location Tab (continued)

After you locate your project, you will be asked a few additional questions. You will be able to attribute actions to each specific site, indicate whether a site is open for public access, and even suppress the site location from public view if you are not comfortable indicating the exact location of your project.

For example, suppose your project involves removing invasive species in your back yard and you map the project to your home, but you suppress the location from public view. Anyone who does a search for projects that involve removing invasive species in your area will see your project description in a search results listing, but the location will not be shown on the accompanying map view depicting project locations from the search results.

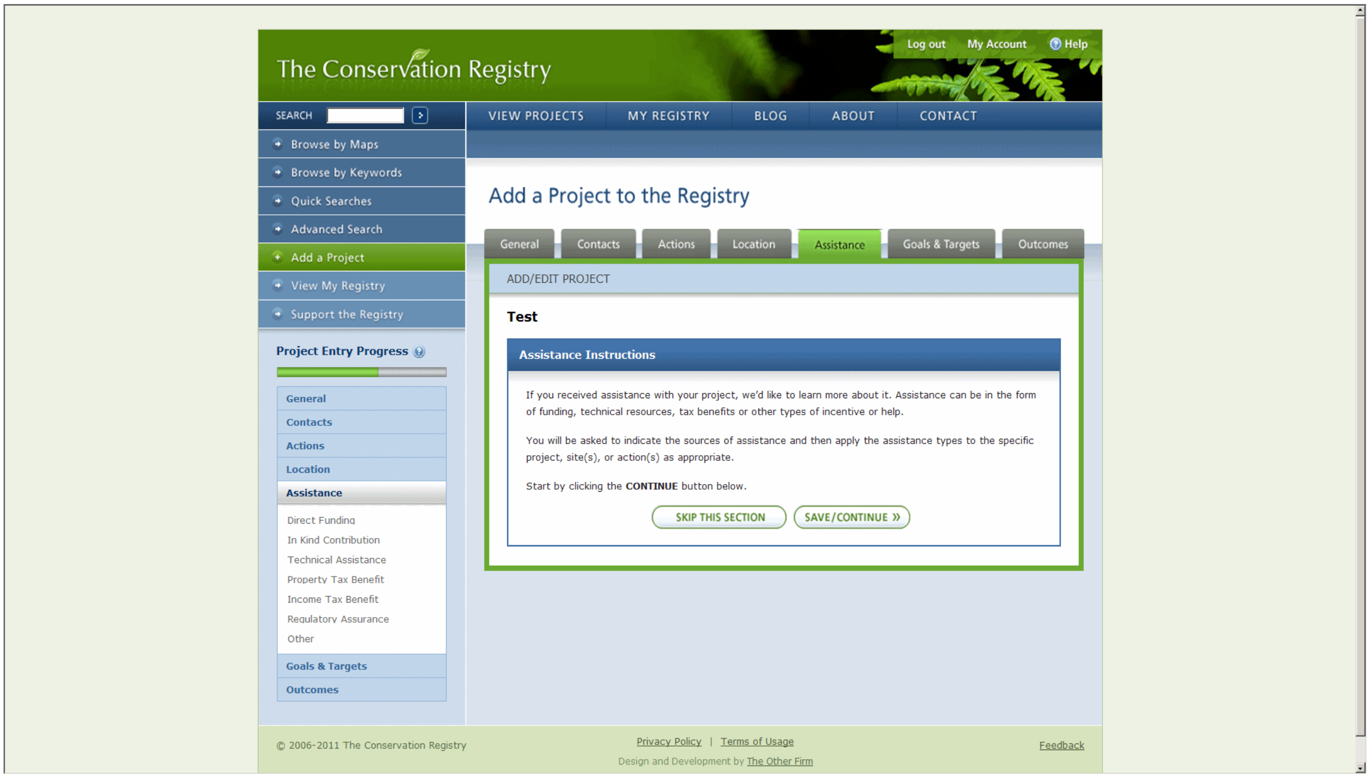
You are now finished entering data in the Location section.

Click "Save/Continue" to proceed to the Assistance data entry page..

Step 5: Assistance Tab

This section allows you to enter information about any assistance your project is going to receive, has received or expects to receive, ranging from funding and in-kind support to property tax benefits. Each section asks a range of questions. For example, under "Direct Funding," users can provide the funding source, amount, status and year received.

- ➢ Although financial details of your project may be helpful to other users (including potential funders), you are not required to disclose this information.



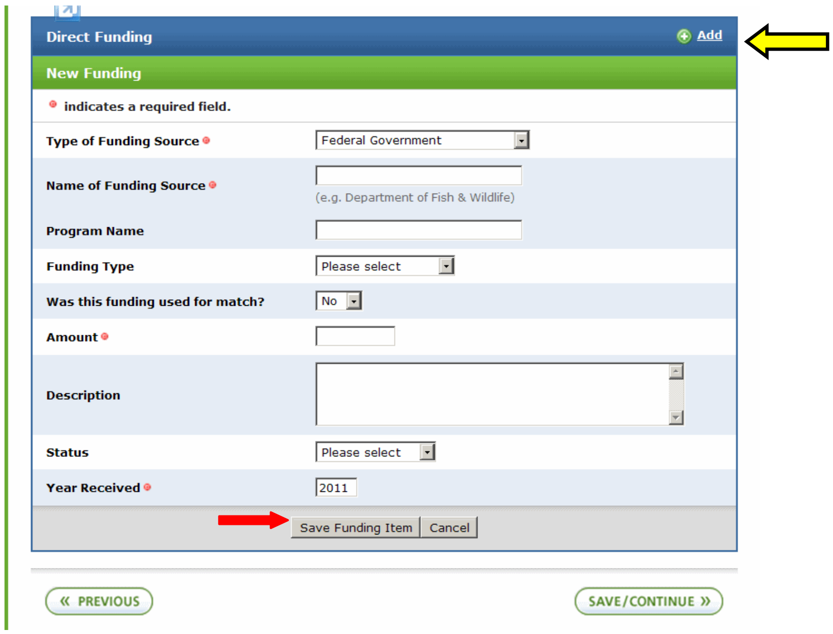
You are not required to enter data in the Assistance section. If you do not wish to enter data, click the "Skip This Section" button and you will move to the "Goals and Targets" data entry page.

If you have Assistance data to enter, click the "Save/Continue" button.

The following section describes the Assistance data you can enter in this section.

Step 5: Assistance Tab (continued)

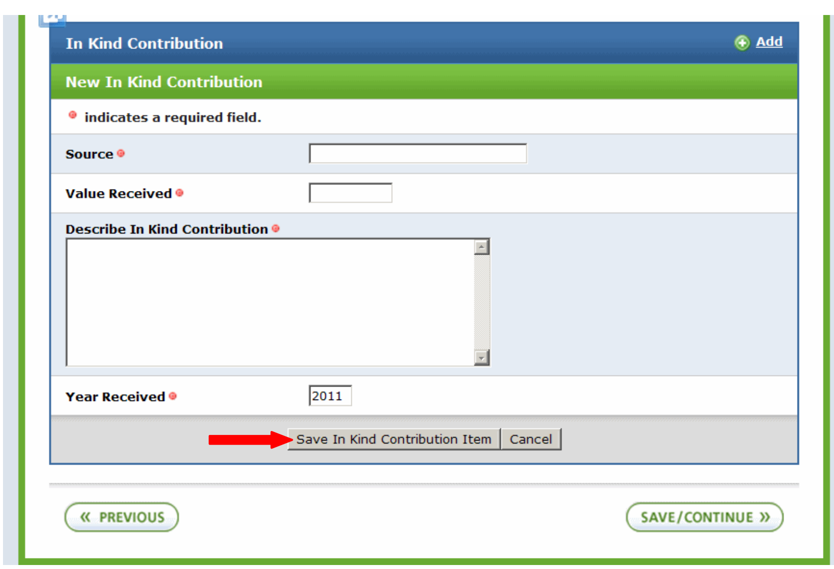
Direct Funding: Did your project require or receive funding? If it did, please indicate the source of funds, amounts and any other pertinent details. If you had multiple sources of funding, click Add in the blue bar (see yellow arrow).



After you've entered the Funding Assistance data, click on the "Save Funding Item" button (see red arrow).

- If you are finished entering data or if you do not wish to enter data to this section, Click the "Save/Continue" button to proceed to the next Assistance topic.

In Kind Contribution: Did your project receive in-kind contributions? If it did, please indicate the source of this benefit and other details. If you had multiple sources of in-kind contributions, click "Add" in the upper right side of the blue bar.

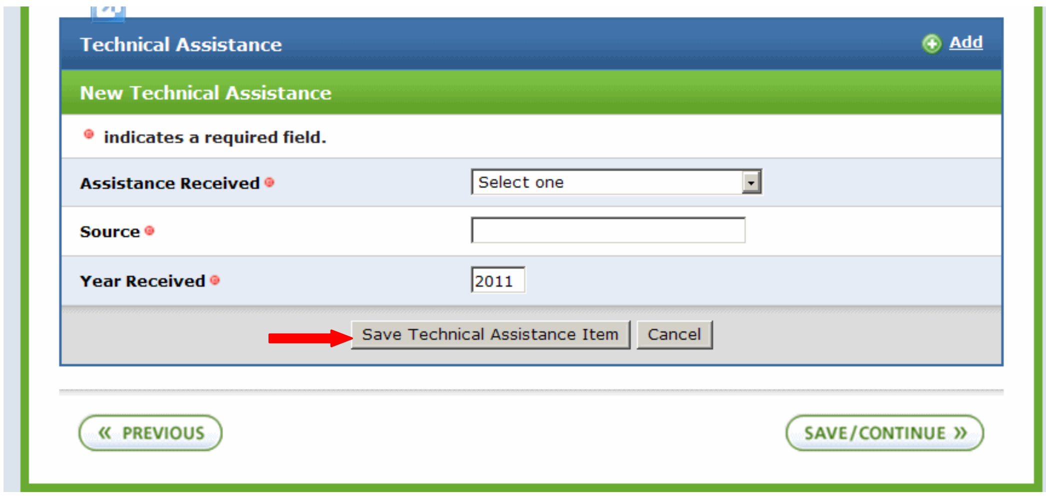


Step 5: Assistance Tab (continued)

After you've entered the In Kind Contribution Assistance data, click on the "Save In Kind Contribution Item" button (see red arrow).

- If you are finished entering data or if you do not wish to enter data to this section, Click the "Save/Continue" button to proceed to the next Assistance topic.

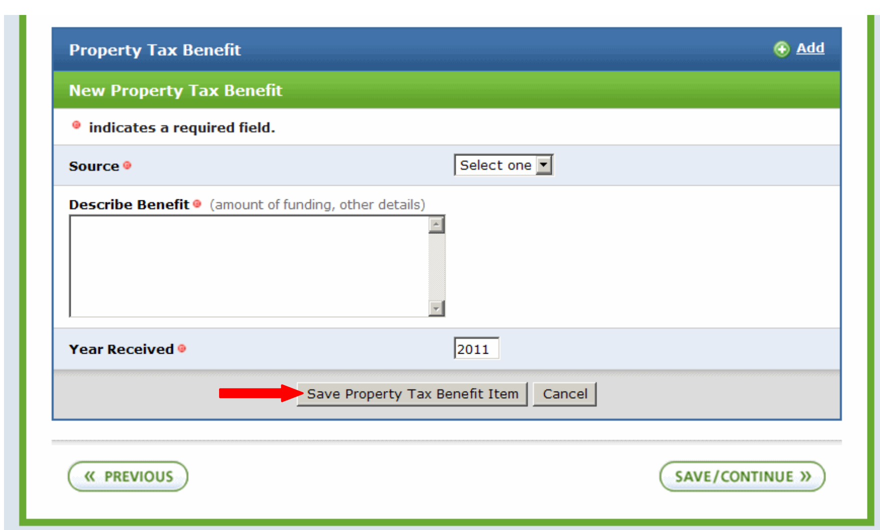
Technical Assistance: Did your project require or receive technical assistance? If it did, please indicate the type of assistance, the source and when it was received. If you had multiple types of technical assistance, click "Add" in the upper right side of the blue bar.



After you've entered the New Technical Assistance data, click on the "Save Technical Assistance Item" button (see red arrow).

- If you are finished entering data or if you do not wish to enter data to this section, Click the "Save/Continue" button to proceed to the next Assistance topic.

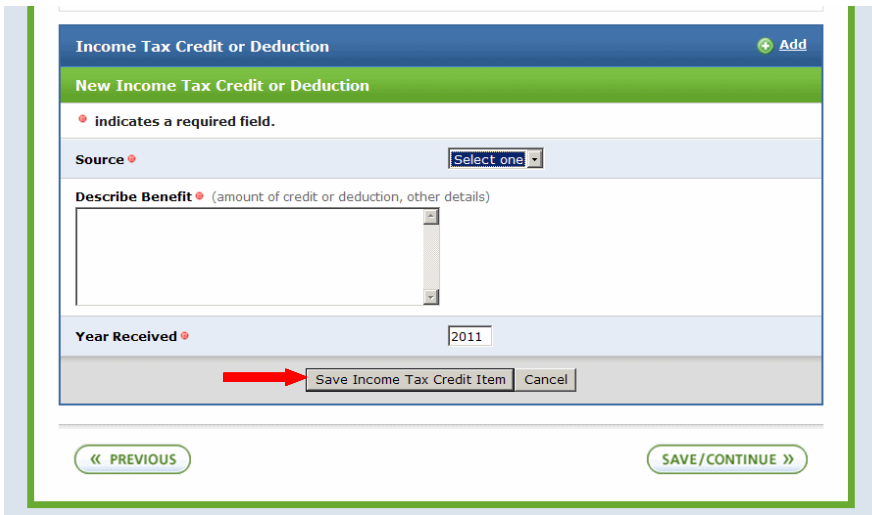
Property Tax Benefit: Did your project qualify for or receive a property tax benefit? If it did, please indicate the source of this benefit and other details. If you had multiple sources of property tax benefits, click "Add" in the upper right side of the blue bar.



After you've entered the Property Tax Benefit Assistance data, click on the "Save Property Tax Benefit Item" button (see red arrow).

- If you are finished entering data or if you do not wish to enter data to this section, Click the "Save/Continue" button to proceed to the next Assistance topic.

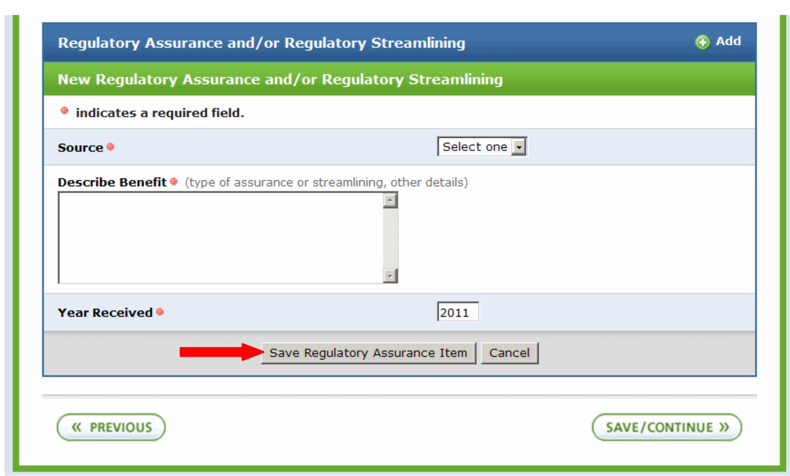
Income Tax Credit or Deduction: Did your project qualify for or receive an income tax benefit? If it did, please indicate the source of this benefit and other details. If you had multiple sources of income tax benefits, click "Add" in the upper right side of the blue bar.



After you've entered the Income Tax Credit or Deduction Assistance data, click on the "Save Income Tax Credit Item" button (see red arrow).

- If you are finished entering data or if you do not wish to enter data to this section, Click the "Save/Continue" button to proceed to the next Assistance topic.

Regulatory Assurance and/or Regulatory Streamlining: Did your project qualify for or receive regulatory assurance or regulatory streamlining? If it did, please indicate the source of this benefit and other details. If you had multiple sources of regulatory assurance or streamlining, click "Add" in the upper right side of the blue bar.

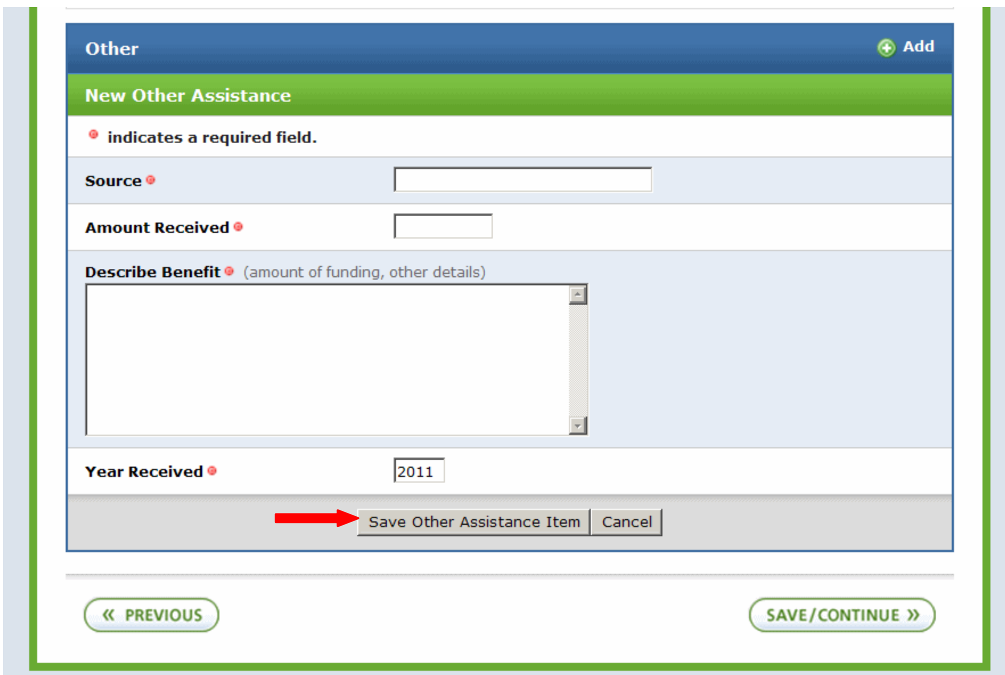


Step 5: Assistance Tab (continued)

After you've entered the Regulatory Assurance and/or Regulatory Streamlining Assistance data, click on the "Save Regulatory Assurance Item" button (see red arrow).

- If you are finished entering data or if you do not wish to enter data to this section, Click the "Save/Continue" button to proceed to the last Assistance topic.

Other: Did your project qualify for or receive another type of assistance that did not match our defined categories? If it did, please indicate the source of this benefit and other details. If you had multiple sources of other benefits, click "Add" in the upper right side of the blue bar.



After you've entered the Other Assistance data, click on the "Save Other Assistance Item" button (see red arrow).

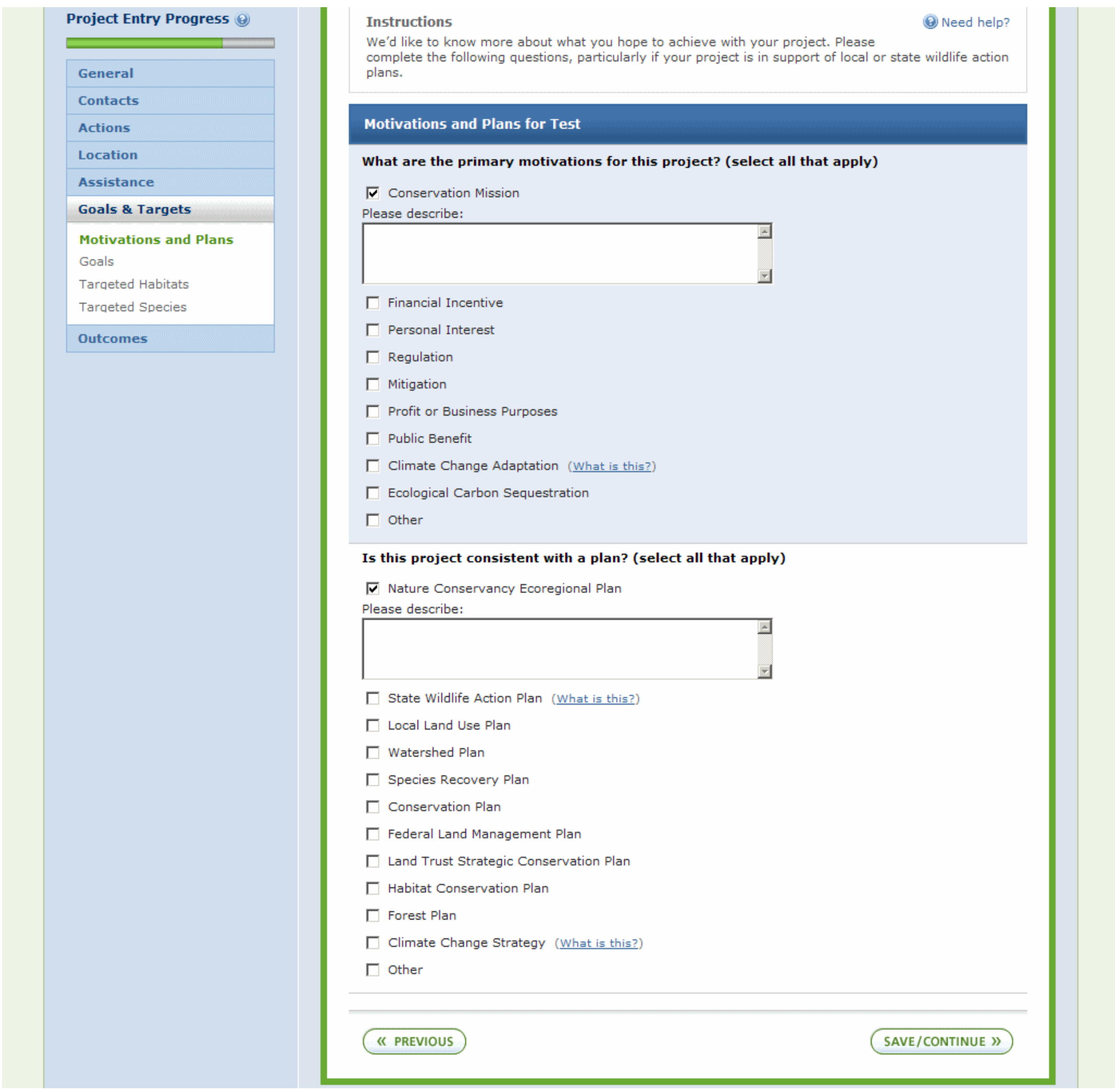
- If you are finished entering data or if you do not wish to enter data to this section, Click the "Save/Continue" button to proceed to next section.

Step 6: Goals and Targets Tab

Motivations and Plans: Under this section, you have the chance to identify what motivated you to do the project, as well as identify the plans the project is consistent with. Motivations could include conservation mission, financial incentive, personal interest, regulation, mitigation, profit or business purposes, public benefit, climate change adaptation, and/or ecological carbon sequestration.

You can also indicate what plans a project is consistent with. Options include TNC ecoregional plan, state wildlife action plan, local land use plan, watershed plan, species recovery plan, conservation plan, federal land management plan, land trust strategic conservation plan, habitat conservation plan, forest plan, and/or climate change strategy.

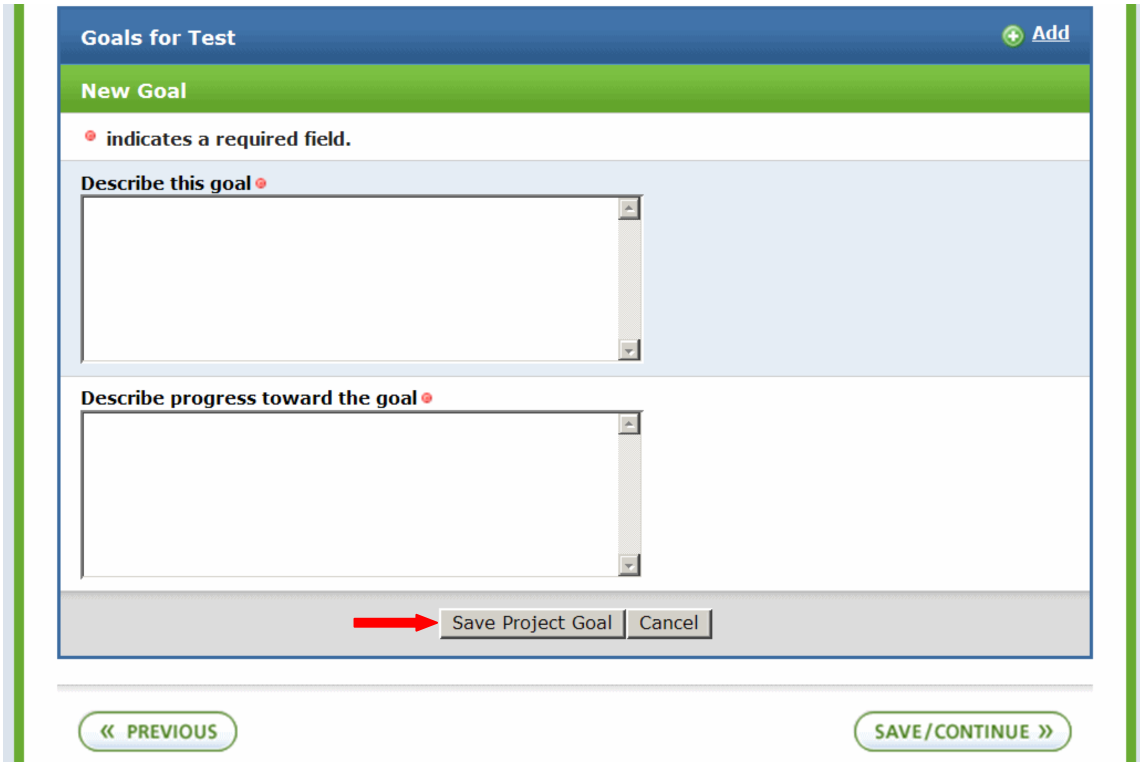
In each section, once you choose an option(s), a text box will expand so that you can provide more detail.



➢ If you are finished entering data or if you do not wish to enter data to this section, Click the "Save/Continue" button to proceed to next section.

Step 6: Goals and Targets Tab (continued)

Goals: This section gives you an opportunity to tell others about what you hope to achieve with your project. Identify the goals for your project and what progress has been made towards reaching those goals. You can list as many goals as necessary, click "Add" in the upper right side of the blue bar.



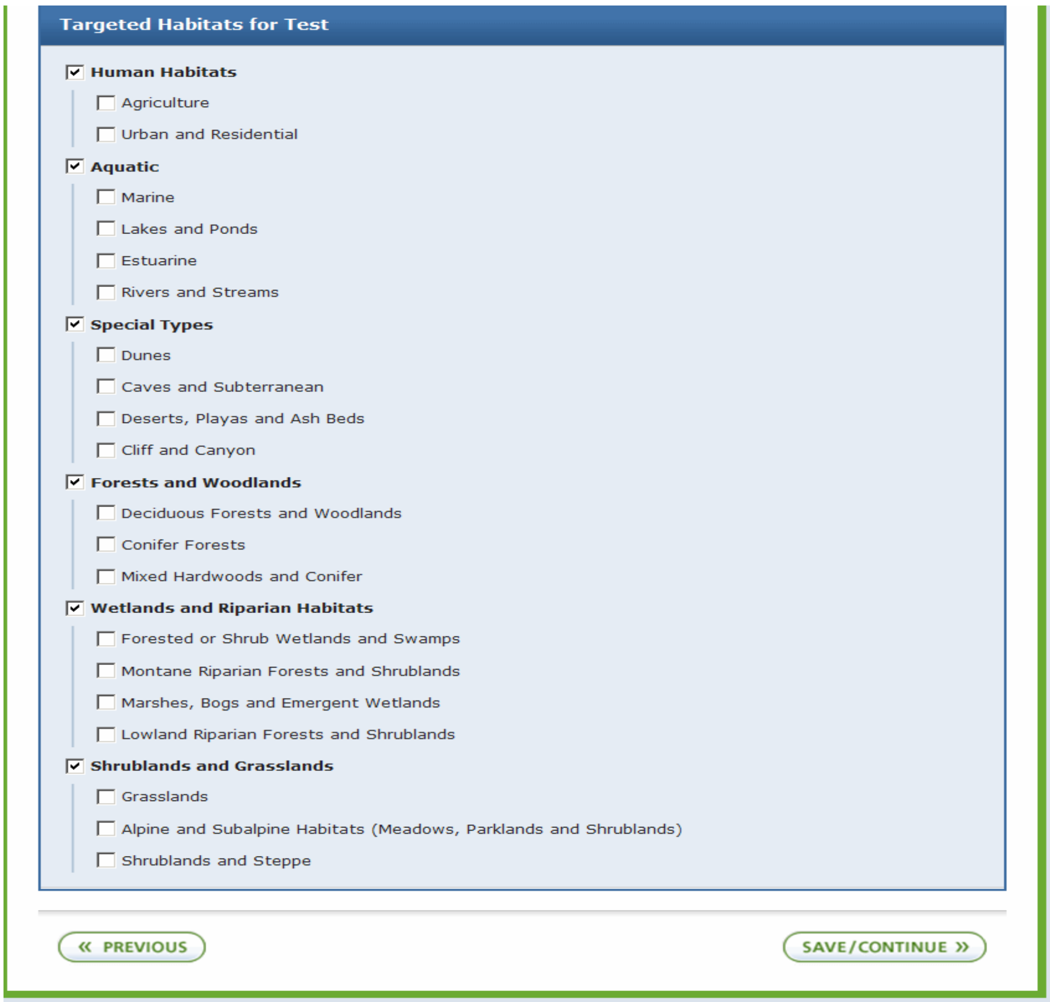
After you've entered the Goals data, click on the "Save Project Goal" button (see red arrow).

- Click the "Save/Continue" button to proceed to next section.

Step 6: Goals and Targets Tab (continued)

Targeted Habitats: This list currently represents two tiers within a national scope. The Wildlife Resources Commission is working toward incorporating a third tier with habitats specific to the Wildlife Action Plan priority list.

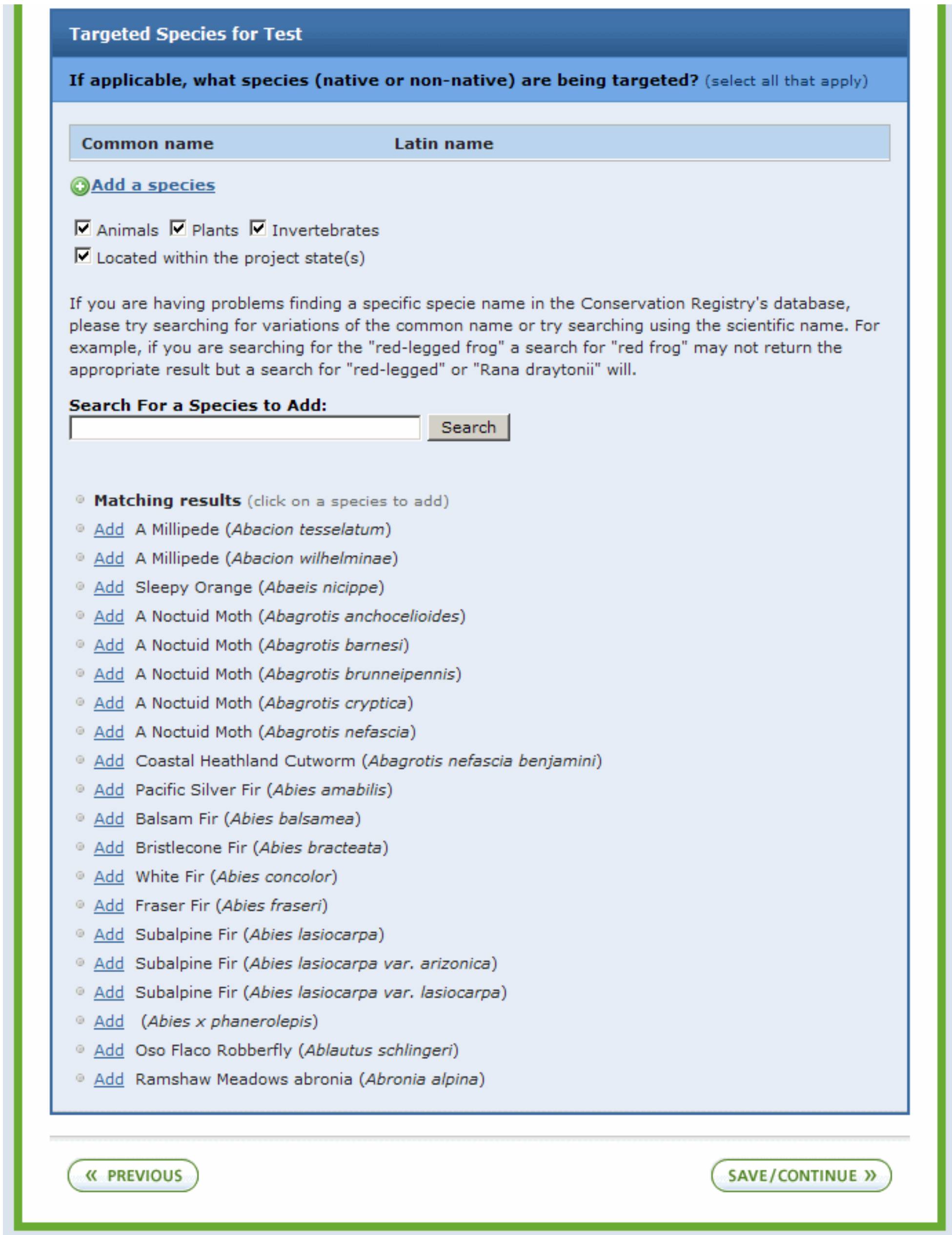
Choose all of the targeted habitats related to your project.



- Click the “Save/Continue” button to proceed to next section.

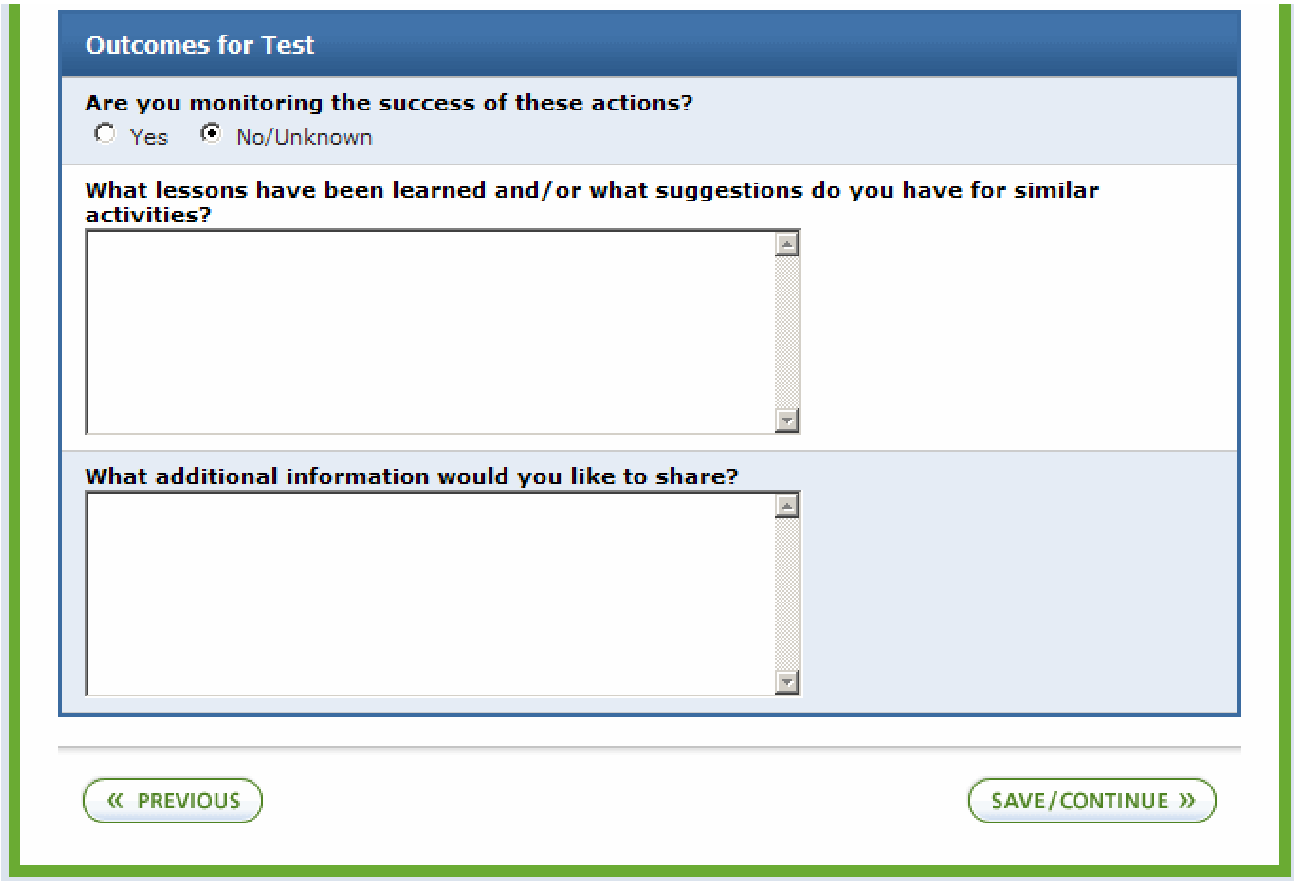
Step 6: Goals and Targets Tab (continued)

Targeted Species: The Conservation Registry is interested in knowing what species your project is focusing on. To indicate targeted species related to your project, simply search by the common or Latin name of the species and you will be presented with suggested species to select.
Click the "Add" button next to the species name when you find the species you are looking for. Add as many different species as desired.



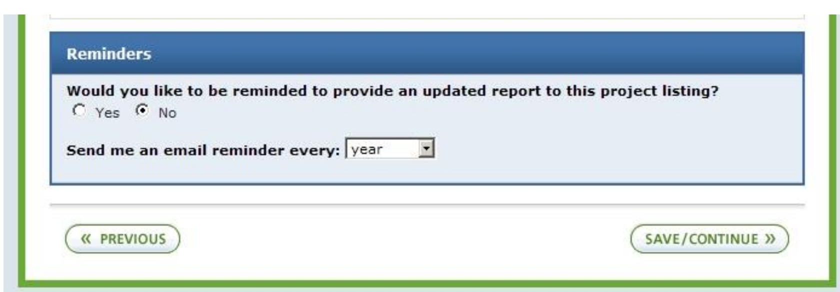
Step 7: Outcomes Tab

Outcomes: Please tell us about the ultimate outcome of your project, ongoing monitoring and any additional information you would like to share. Even if your results were less successful than planned, be frank about what happened. Your lessons learned could help others with similar efforts.



- Click the "Save/Continue" button to proceed to the last data entry section.

Reminders: Many conservation efforts are never really complete. If you have a specific milestone in the future, you can schedule a reminder for a specific date. Please indicate your preference on receiving automatic email reminders to update your project information.

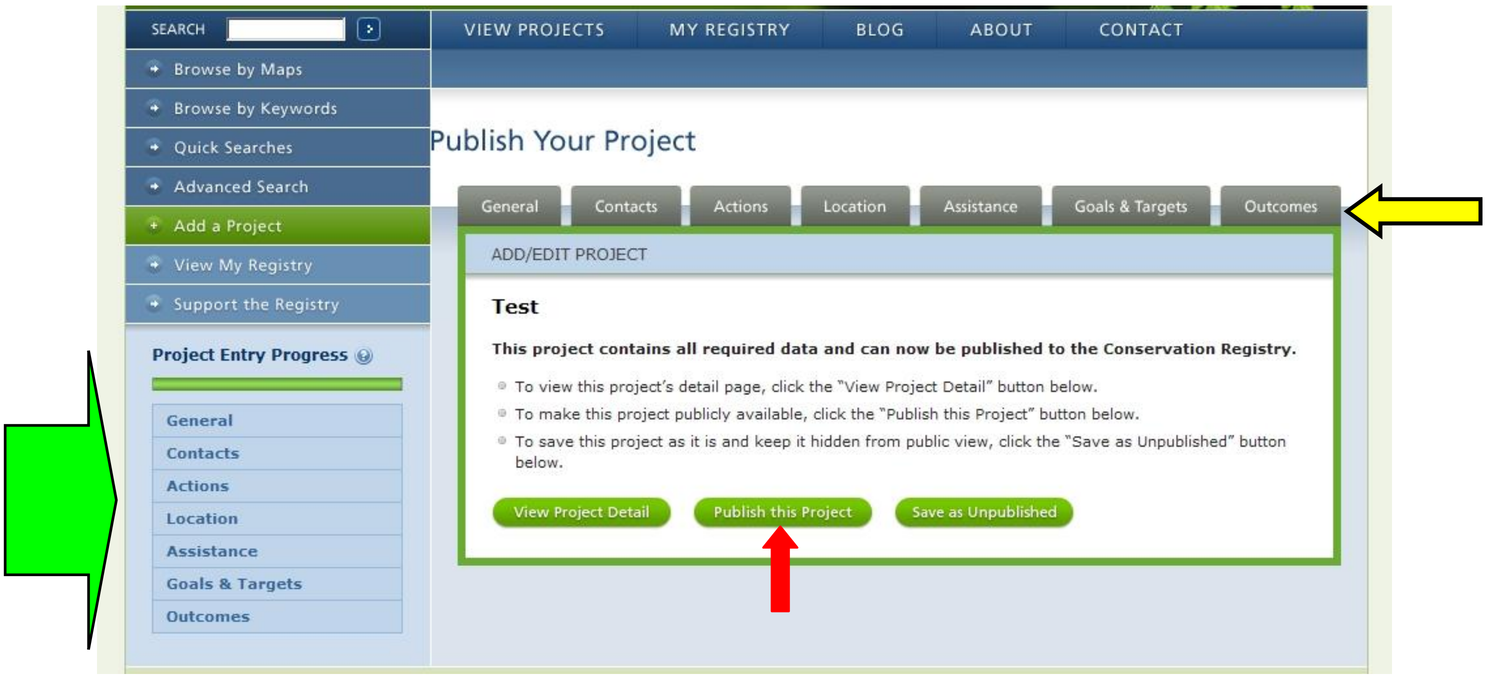


- Click the "Save/Continue" button to proceed to the last data entry section.

FINAL STEPS

When a user has submitted all of the required information and clicks continue after the "Reminders" page, they are given three options:

1. View Project Detail
2. Publish Project
3. Save as Unpublished.



You will need to click "**Publish this Project**" (see red arrow) for it to be available for others to find on the Registry.

If you would like to review a particular section described by each "Step" in these instructions, you have two options:

- click on the name of the step shown in the tabs under the "Add a Project to the Registry" (see yellow arrow) screen title

- click on the name of the step shown in the "Project Entry Progress" menu (see green arrow) along the left side of the screen.

Don't forget to "Save" and publish the project.