

An aerial photograph of a large, rectangular agricultural field. The field is divided into sections by narrow paths or furrows. The color of the field varies from light brown to green, suggesting different stages of crop growth or different types of crops. A paved road runs along the right side of the field, and a dirt road runs along the bottom left. There are several trees, some with yellow leaves, scattered around the field and along the roads. The overall scene is a typical rural landscape.

# FIELDDOC USER GUIDE

FieldDoc is a product of



## Introduction

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Pennsylvania has more miles of waterways than any other state in the contiguous United States. Those creeks, streams, and rivers are used by families, farmers, tourists, and industry for work and play. Unfortunately, all of this use has been hard on PA's waters. More than 86,000 miles of streams and rivers are impaired. That means almost a third of PA's waterways do not meet state water pollution standards!

Clean water efforts are underway in Pennsylvania and have been for decades. PA's water is clean thanks to improved wastewater treatment, use of innovative farming methods, and state and local permitting.

In order to achieve local and regional clean water goals, such work must continue to expand.

Since April 2017, a collaborative effort to develop county- based Action Plans for Clean Water that are realistic, and implementable by local communities, has been underway. The initiative included representatives from: government agencies, the state legislature, county and local governments, industry associations, NGOs, and citizens.

There are 43 counties in the Chesapeake Bay watershed. Pennsylvania's nitrogen and phosphorus reduction targets are broken down into local planning goals for each of these counties. Added together, these local pollution reductions will help Pennsylvania reach its clean water targets.

In order for each of the 43 counties to meet their assigned nitrogen and phosphorus reduction targets, we must collect, track, and report Best Management Practices. Best Management Practices tracking and reporting is a critical component for implementation of the Countywide Action Plans. Project implementors can streamline their project management and estimated pollution reduction calculations with the FieldDoc platform.

NOTE: The Commons edits this Guide regularly to reflect the latest updates to FieldDoc. This version reflects system updates made through April, 2022. Additional information and videos can be found at [help.fielddoc.org](http://help.fielddoc.org).

## Welcome to FieldDoc

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[FieldDoc.org](https://fielddoc.org) is a web-based project management and data management tool developed for the water quality restoration community. The platform is set up so that the Best Management Practice implementors, county Community Clean Water Action Plan Coordinators, and program administrators can track the location of Best Management Practices, the impacts of projects for reducing sediment and nutrients, and progress toward implementation of Countywide Action Plans. FieldDoc allows users to see transparent progress and is integrated with other data management systems (PracticeKeeper, NRCS, and other state and federal programs) for implementation of Countywide Action Plans.

Project implementation tracking and reporting is a critical component for implementation of the Countywide Action Plans. Project implementors can streamline their project management and estimated pollution reduction calculations with the FieldDoc platform.

### How to Use this Guide

This guide provides complete but simple instructions for project implementors, data managers, and county Community Clean Water Action Plan Coordinators to utilize the FieldDoc platform. Use this guide to create an account, report planned and implemented Best Management Practices, calculate estimated nutrient and sediment reductions, and track progress towards implementation of the Countywide Action Plan. Please visit the [Pennsylvania Clean Water Academy](https://www.pennstate.edu/cleanwateracademy/) for instruction videos on how to utilize FieldDoc.

Additional online help documentation and videos are available at [help.fielddoc.org](https://help.fielddoc.org). **If you need additional support, please contact your county Community Clean Water Action Plan Coordinator.**

While FieldDoc has been built with simplicity in mind, we highly recommend familiarizing yourself with the system and data entry process using this guide and the training webinars found on the [Pennsylvania Clean Water Academy](https://www.pennstate.edu/cleanwateracademy/) before embarking on your data entry process.

Let's get started!

NOTE: The Commons edits this Guide regularly to reflect the latest updates to FieldDoc. This version reflects system updates made through April, 2022. Additional information and videos can be found at [help.fielddoc.org](https://help.fielddoc.org).

## Icon library

The following list of icons and their brief description provides an overview of all icons you might encounter throughout FieldDoc. Familiarize yourself with them here so you can move around and build your project faster.



### Add Image

Add photos of the practice location, such as before and post-installation.

**available for Project**



### Collaborators

Everyone that you add can access and edit all components of your project.

**available for Project**



### Copy

Copy practices that report the same target metrics.

**available for Practice**



### Delete

Deleting any component is an irreversible action.

**available for many**



### Documents

Review all photos and files uploaded to a project.

**available for Projects**



### Edit

Change log records all edits made including user, date, and time of edit.

**available for many**



### Edit Location

Draw, upload, or edit a geometry within each practice.

**available for Practice**



### Exports

Export a .CSV or Geo-package of all information at the practice scale.

**available for Project, Program**



### Home

Returns user to project or program overview page.

**available for Account**



### Maps

Build custom filters from the atlas of projects within a program or portfolio.

**available for Project, Program**



### Metrics

Curate lists, set targets, and track progress for project and program metrics.

**available for Practice, Program**



### Organization

Uneditable account information that ties projects and users together.

**available for Account**



### Partnerships

Associate outside organizations providing match with your project.

**available for Projects**



### Practice

Curate a programmatic list of available practices for basic user application.

**available for Programs**

## Icon Library, continued



### Reports

Updates of installation progress for practices revise summary charts.

**available for Practice**



### Print

Save a PDF of your page.

**available for Project, Practice**



### Profile

Individual to each user, confirms basic account information.

**available for Account**



### Projects

Delivers user to a portfolio of all projects the user has permissions to view.

**available for Account**



### Save

Save your work using the check mark. FieldDoc does not save work automatically.

**available for many**



### Tags

Program managers can create and assign tags to filter and organize projects.

**available for Project, Practice, Program**



### Upload File

Upload additional information to your project page.

**available for Project**



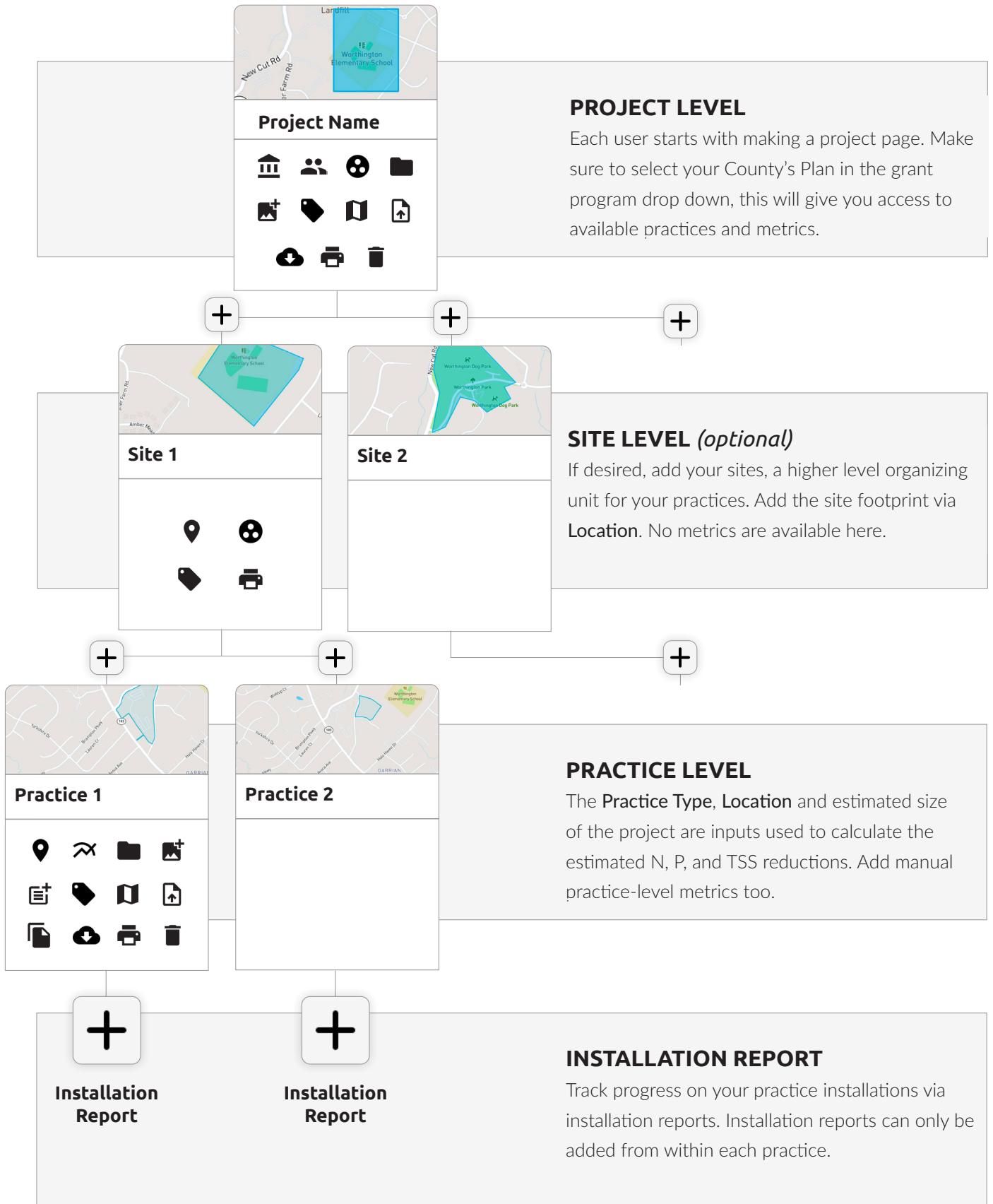
### View Summary

Summary pages collect all information inputted into that section.

**available for Project, Practice, Program**

## FieldDoc System Structure

The different components of FieldDoc projects fit together to build out your work and track your installation progress via metric targets.



## Data Definitions, Projects

Throughout FieldDoc you will find fields for data entry. The following pages identify each of the fields, define the field, and provide a brief description of what information to enter into the field.

<b>PROJECTS</b>	
Projects enable FieldDoc users to summarize metrics and implementation across sites and practices. They also provide a means to report restoration efforts (best management practices) to programs.	
<b>Data Field</b>	<b>Use and Definition</b>
Project Name	The name of the project for which to group practices and sites. Include a name that aligns most relevantly to the work you are conducting and add practices and sites accordingly.
Project Description	Curate List of Practices and incorporate into MEB Program.
Grant Program	Program for which you will be reporting practices to. Please enter your county watershed implementation plan name: IE, Franklin County WIP.
Project Toggle Status	<p><b>Draft:</b> practices are in the planning phase and is not yet being installed</p> <p><b>Active:</b> practices are currently being installed but is not yet complete</p> <p><b>Complete:</b> practices are installed and functioning as intended, this practices are ready to be reported to DEP.</p>

## Data Definitions, Practices

This page identifies each of the fields, define the field, and provide a brief description of what information to enter into fields that you will find within each practice page.

<b>PRACTICES</b>	
Best management practices specify the location and explicit work happening on the landscape. They can be added directly from the project overview page.	
<b>Data Field</b>	<b>Use and Definition</b>
<b>Practice Name</b>	The name of the practice you are implementing. Please use a name that is relevant to the work you plan or have worked to implement.
<b>Practice Description</b>	A high level description of the practice being implemented. Description are text and provide anecdotal information on the work being planned or implemented.
<b>Practice Type</b>	Select from a list of defined practice types to define you work as it relates to the watershed implementation plan. FieldDoc provides definitions and standardized practice type names for your use and convenience.
<b>Practice Extent</b>	Practice extent is an optional field that allows you to put in the specific area or length of a given practice. When a user draws the practice footprint, FieldDoc will automatically calculate the extent of the practice however the Practice Extent field allows you to update the size based on your records.
<b>Metric Goals</b>	The following fields allows users to put in the planned amount of implementation of the given practice. This is often the practice extent and is used to set the target for implementation. If the only metric goal available is related to the size of the practice, please ensure this number is reflective of the practice extent.
<b>Reports</b>	Reports allow the user to document any installation that has occurred toward the metric goals. Please add the date, and progress of implementation toward metric goals outlined for a given practice. This does not include any details on the completion of the practice. For this information please utilize the "Completion Status" tab.
<b>Completion Status</b>	If the practice is completed, please click the "Mark Practice as Completed" button. This will provide a date for which the practice was installed. Be sure to complete the date for which the practice was completed.
<b>Inspection Log</b>	Please enter the date for which the practice was inspected. Users are asked to certify that upon inspection, the practice is functioning as intended or not functioning as intended. Notes are available for users to enter details of the given inspection. Please note that multiple inspection reports can be completed for a given practice.
<b>Partners</b>	Please add any additional funding sources that have helped make project implementation possible. This field enables PADEP to document other possible programs that could be reporting the given practice.



## Step 1. Register for a FieldDoc account

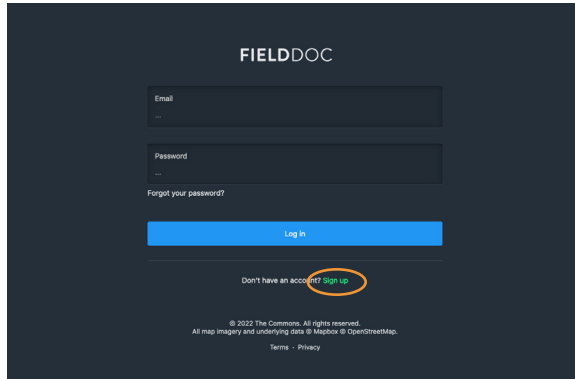
Create an account to enter FieldDoc. Once you have set up your account you can explore all of FieldDoc’s features and start setting up your own projects to track and manage.

**TIP:** Multiple users can collaborate on the same project. Each user must create a single account rather than sharing log-in information.

**TIP:** Use your work email address for an easier set up process.

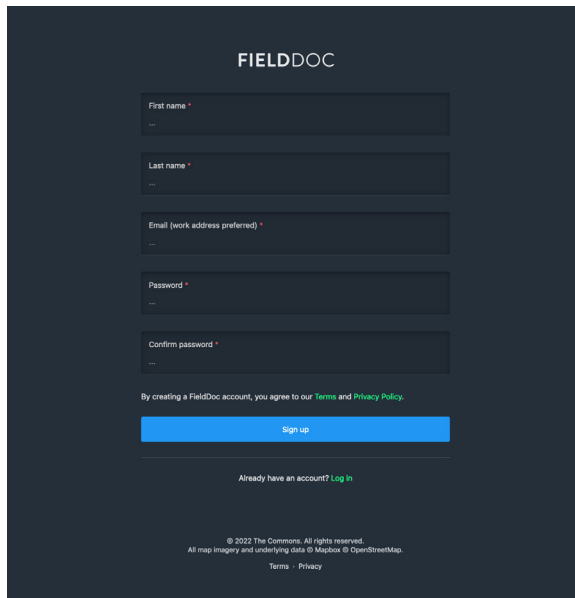
**TIP:** If you are an organization owner, you will need to approve or reject requests to join your organization.

**TIP:** Only staff or volunteers at your organization can be part of your organization.



### Navigate to Registration Page

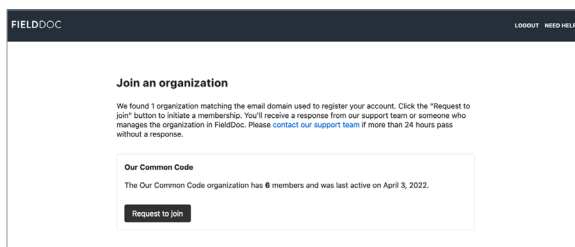
Create your user account at <https://www.fielddoc.org/register> or from the log-in page, click **Sign Up** to register.



### Enter the registration required fields

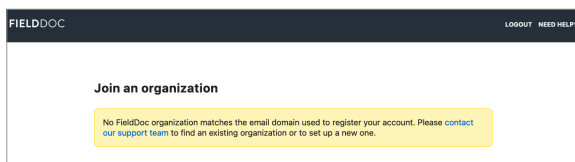
Enter a valid email address, first name and last name, organization, and password to create your account.

Tap the “Sign Up” button to move to the next step of the registration process. Every user must be associated with an organization.



### Option 1. Request to join your organization

The system will recommend an organization to join based on your email domain name. Click “request to join”. An email will be sent to the organization owner who must then approve your request. Upon approval you can begin entering projects.

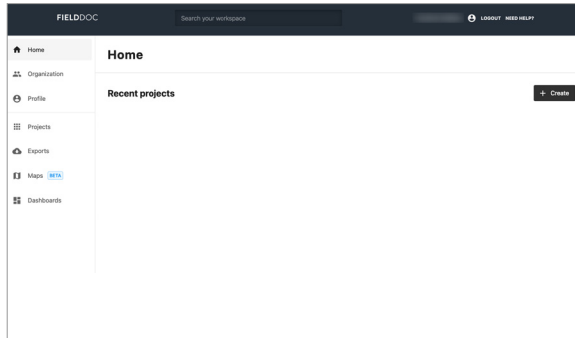


### Option 2. Add your organization

If your organization is not yet in the system or we cannot determine your organization, email [support@fielddoc.org](mailto:support@fielddoc.org). A new organization will be created for you.

## Step 2. Build your project summary

Each **project** represents the Countywide Action Plan that you are involved with. Projects house Countywide Action Plan information with areas to track and report individual practices and sites that are associated with the Countywide Action Plan.



**TIP:** You can add multiple projects and navigate between all projects via the Project tiles on your landing page.

Enter a name for this project.

Select a program supported by FieldDoc (required for project setup).

### Create project

**Profile**

**Name**  
#00000 The User Guide Restoration Project

**Description**  
This is a demonstration project created to update the [FieldDoc](#) User Guide in June 2020

Descriptions may contain up to 1,500 characters, including spaces and punctuation. (86 used)

**Organization**  
FieldDoc Support

The project's organization cannot be changed.

**Grant Program**  
Select from programs supported by FieldDoc. Program is required to load metrics and models.

**Privacy**

OFF  ON

This project is public. It can only be viewed and edited by project collaborators and program managers. Geographic data related to this project will appear on dashboard maps.

**TIP:** Each project can only have one associated Grant Program.

### Start a New Project

Log into your [FieldDoc.org](https://FieldDoc.org) account. Users always start at the Home page. From here, click “Projects” on the left hand panel to access all projects in your portfolio.

By clicking the [+ create] button in the upper right hand corner to start building a new project.

### Name your project

Enter your own name for the project.

Search for “(county name) Watershed Implementation Plan” in the **Search programs** field.



### Description

Enter a description that matches your role as affiliated with your Countywide Action Plan.

### Organization

Will pre-populate with user account.

### Grant Program

Each program displays a separate list of practices, metrics, and models.

### Privacy

Keep privacy setting off.

save your inputs



navigate to summary page

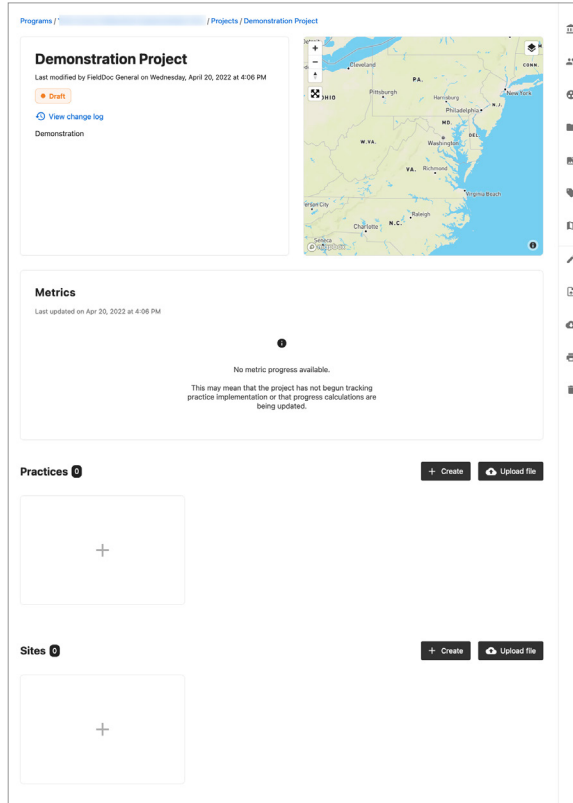


### Step 3. Project Level Summary Page

Before you add your implementation information, let's take a quick tour of your project summary page. Your summary page will update as you add your practices' type, location, and metric information.

**TIP:** When adding practices, this summary page will update to include your practices.

**TIP:** Metrics and targets are based on 2019 progress and initiatives identified in the Countywide Action Plans.



### Project Summary Page Overview

#### Status

Each project begins as a draft. A program administrator will change the status if they select your project for funding.

#### Change Log

Check the change log to review any edits made to your project.

#### Map

The map will zoom in to your county and will expand as you add locations to your practices and/or sites.

#### Metrics

Metric targets added at the practice level appear in summary on this page. Indicate progress in practice reports.

#### Practices

Practices are limited to represent the list of practices you can report through FieldDoc. FieldDoc will calculate the estimated nutrient and sediment reductions for each practice. Follow Step 6 to add your practices.

#### Sites (optional)

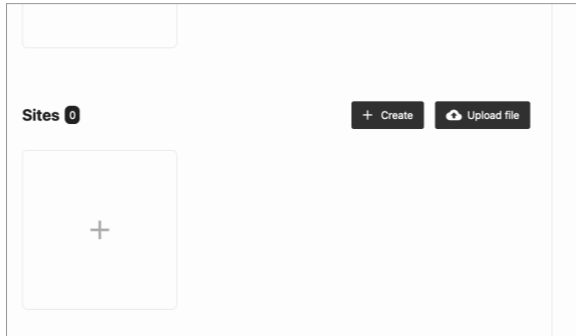
Sites are an organizational feature that users with large projects may choose to use. Follow instructions in Step 4 to add site locations individually or in a batch.

#### Right Side Panel

Use the right hand panel of icons to navigate to additional project-level inputs.

**Step 4. Add sites to your project (optional, go to step 6 if skipping)**

Sites identify the location of one or more practices. From your **project summary dashboard**, click the plus sign under **Sites** to add sites individually or use the **Site Batch Importer** to upload multiple sites simultaneously. Repeat for more sites.



Enter a name for this site.

Cancel OK



**Tips**

In addition to the mandatory **.shp**, **.shx**, and **.dbf** files, shapefile archives must include a **.prj** file that describes the coordinate system and projection. All files must be compressed into a **.zip** file before uploading. To ensure that FieldDoc reads the archive correctly, the archive itself and the files it contains should share the same name. File names must not contain spaces.

GeoJSON files must use the **.json** or **.geojson** file extensions and follow the format described in [this specification](#). We recommend testing GeoJSON data with [geojson.io](#) before uploading it to FieldDoc. See [here](#) for more help with the GeoJSON format.

FieldDoc uses the World Geodetic System (WGS84, EPSG:4326) as its reference coordinate system. FieldDoc does not support other coordinate systems or projections.

Regardless of type, file uploads cannot exceed 20 MB. For shapefile archives, this is the maximum total size of all **un-compressed** files.

Batch import is optimized for 100 sites or fewer. Refer to our [help documentation](#) for more guidance on batch imports and upload requirements.

No file selected.

Cancel Upload

Sites can refer to a specific parcel or organizational unit such as a county. Sites only display the polygon and do not contain any metric information.

**Option 1. Create individual sites.**

On your project summary page, tap the [+ Create] to create an individual site.

Name your site and tap OK.

Return to the project summary page to create additional sites within your project.

**Option 2. Upload multiple polygons**

The importer allows you to create multiple sites simultaneously. The importer accepts .zip files with archived ESRI files: .shp, .shx, .dbg, and a .prj (WGS1984). The system is optimized for 500 sites or less.

FieldDoc will separate each polygon as a separate site location that will appear as a unique tile in FieldDoc.

Once you have imported your file you will edit each site to add a description and confirm the site name.

Next you will add details to your site and add practices to your sites.

## Step 5. Enter your site details and location information

Name your site. Each site also needs a corresponding polygon to delineate its boundaries. Your site should outline the parcels where you will implement practices. Polygons can be drawn directly on the map or uploaded.



Projects / Demonstration Project / Sites / Site One / Edit site

### Edit site

**Name**

Site One

**Description**

Site description

Descriptions may contain up to 1,500 characters, including spaces and punctuation. (0 used)

**Privacy**

Off  On

This site is public. It can only be viewed and edited by project collaborators and program managers. Geographic data related to this site will appear on dashboard maps.

✔

### Add details for your new site

#### Name

Enter site name

#### Description

Describe the parcel location. This is entirely up to your discretion.

#### Privacy

Public = Off, Private = On. Private sites will not appear on dashboard maps. Public is preferred but private is an option.

save your inputs



navigate to summary page



**TIP:** If your polygon does not appear on the map, try: dissolve multiple polygons to one layer or uploading and re-exporting the file through mapshaper.org.

**TIP:** Site polygons, once added, will appear blue on the project summary page and in the site tiles.

Projects / Demonstration Project / Sites / Site One / Edit location

### Edit location

**Address**

Q Search

**Estimated site extent**

Unable to calculate estimated extent.

**Draw site location**

If you do not have GeoJSON data or a shapefile of your site area then you can draw your site directly on the map. To draw a polygon, select the square polygon draw tool, second from the top of available tools. Estimate your site area and double click to complete the shape. FieldDoc uses the delineated polygon area to perform model calculations.

**Upload GeoJSON or an Esri Shapefile**

In addition to the mandatory **.shp**, **.shx**, and **.dbf** files, shapefile archives must include a **.prj** file that describes the coordinate system and projection. All files must be compressed into a **.zip** file before uploading. To ensure that FieldDoc reads the archive correctly, the archive itself and the files it contains should share the same name. File names must not contain spaces.

GeoJSON files must use the **.json** or **.geojson** file extensions and follow the format described in this [specification](#). We recommend testing GeoJSON data with [geojson.io](#) before uploading it to FieldDoc. See [here](#) for more help with the GeoJSON format.

Regardless of type, file uploads cannot exceed 20 MB. For shapefile archives, this is the maximum total size of all **un-compressed** files.

Browse... No file selected.

✔

### Option 1. Draw your polygon.

Use the address finder to zoom in on the map. Click on the Layers Icon and switch the basemap to "Satellite" in order to better delineate a parcel boundary.

Then use the Polygon tool to draw the location boundary. Click the green save button to confirm the location.

### Option 2. Upload your polygon.

Any ESRI shapefile upload must be packaged as a .zip file that includes the following: a .shp, .shx, .dbf, and .prj file. The coordinate system and projection should be WGS1984.

Each file can only have one record associated with it. If your file includes multiple polygons make sure to dissolve the features into one record.

save your inputs



navigate to summary page



**STOP! Please answer the following questions before continuing!**

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Before moving forward with your Best Management Practice (BMP) project entry, please answer the following questions. If your answer matches the answer in parenthesis, then report your project in FieldDoc!

By asking these questions, we are trying to identify the funding sources related to the Best Management Practices that will be reported in FieldDoc. FieldDoc is used to track non – agriculture projects that Countywide Action Plan (CAP) Implementation funding is used for. Projects that are funded by state or federal grant programs that already report data to DEP should only be entered into FieldDoc if CAP Implementation funding is also used to partially fund the project.

Please refer to page 14 of this User Guide for a complete list of Programs that DEP currently receives data reporting from.

1. Is this practice on the list of approved BMPs in FieldDoc? (YES)
2. Is this project fully or partially funded by Countywide Action Plan (CAP) Implementation funding? (YES)
3. If the project DOES NOT include any CAP funding, was this project funded by a state or federal grant program that already reports data to DEP/EPA? (No)

**If your answer matches the answer in parenthesis, then continue following these steps to report your project into FieldDoc!**

## Step 6. Add Partners to your project (required)

Partnerships refer to the funding sources you will be using to implement your project.



**TIP:** If you plan to use CAP Implementation dollars along with additional funding sources, enter the county's Countywide Action Plan AND the other funding sources.

**Partnerships**

Add or remove project partners here. If applicable, enter the matching contribution and a brief description for each partner organization. Note that this list of organizations will cascade to any sites and practices that you add to this project. From there you'll have the option to show how you allocated matching funds and services.

If you have trouble managing project partners, feel free to drop us a line at [support@fielddoc.org](mailto:support@fielddoc.org)

Search organizations

Tip: If the organization you enter doesn't exist, FieldDoc will create it automatically. Note that the FieldDoc team may standardize the organization name as part of our routine quality control process.

### Add partners individually

Multiple partnerships can be added here. Add each partnership individually.

Partners will be added at the practice level.

**Partnerships**

**Organization**  
Fully Funded with CAP dollars

**Amount**  
0

Enter a dollar amount for any matching contributions provided by this partner.

**Description**

Descriptions may contain up to 1,000 characters, including spaces and punctuation. (0 used)

### Add the funding amount

Enter an allocation amount. Amount should be entered without dollar signs or commas, just digits.

Include a brief description for each partner organization.

save your inputs



navigate to summary page



## Chesapeake Bay Office Cost Share and Permit Reporting Guide

The Dept. of Environmental Protection (DEP) Chesapeake Bay Office (CBO) receives Best Management Practices (BMPs) reporting as part of federal and state cost share programs along with regulatory permit reports. The BMP information is reviewed at the state level and then reported to the Environmental Protection Agency (EPA) on an annual basis. The BMP reporting is credited at the county, state and federal level to meet the 2025 Chesapeake Bay goals for PA.

### How to Use this Guide

Before reporting your Best Management Practices (BMPs) in FieldDoc check the below list for cost share and regulatory programs. If you have received funding from any of these programs, the associated BMPs have already been reported to the Dept. of Environmental Protection Chesapeake Bay Office. Please only report BMPs to FieldDoc that use any of the below cost share or permitted programs if CAP Implementation funding were also used in conjunction with these funds. If you have any questions on what to report to FieldDoc please contact the resource account for the Chesapeake Bay Office's Tier 1 and 2 counties at RA-EPCBOCAP12@pa.gov and Tier 3 and 4 counties at RA-EPCBOCAP34@pa.gov.

Cost Share and Permit Programs Reported to Department of Environmental Protection Chesapeake Bay Office.

- Chesapeake Bay Foundation's Keystone 10 Million Tree Program
- Dept. of Defense (DOD) – Federal Lands
- Farm Service Agency (FSA) Program for Best Management Practices (BMPs)
- Grass Roots Program
- National Fish & Wildlife Foundation (NFWF) - Historic BMPs
- National Resource Conservation Service (NRCS) Potomac Pilot
- National Resource Conservation Service (NRCS) Program specific Best Management Practices (BMPs)
- PA Act 6 Nutrient Management Program
- PA Dept. Agriculture that includes REAP and CEG programs
- PA Dept. Conservation and Natural Resources (DCNR) and PA Game Commission (PGC) Forest Harvest Information
- PA Dept. Conservation and Natural Resources (DCNR) TreeVitalize/Urban Forestry Program
- PA Dept. Conservation and Natural Resources (DCNR) Recreation
- PA Dept. Environmental Protection (DEP) Abandoned Mine Reclamation Program
- PA Dept. Environmental Protection (DEP) Agriculture Inspections
- PA Dept. Environmental Protection (DEP) Air Quality Program
- PA Dept. Environmental Protection (DEP) Chapter 102 Program (includes Erosion & Sediment Program)
- PA Dept. Environmental Protection (DEP) Chapter 105 Program
- PA Dept. Environmental Protection (DEP) Chesapeake Bay Implementation Grants
- PA Dept. Environmental Protection (DEP) funded Agriculture Planning Reimbursement Program
- PA Dept. Environmental Protection (DEP) funded Tillage Residue and Cover Crop Survey
- PA Dept. Environmental Protection (DEP) Municipal Separate Storm Sewer System (MS4)
- PA Dept. Environmental Protection (DEP) Nutrient Trading Program
- PA Dept. Environmental Protection (DEP) Oil and Gas Program
- PA Dept. Environmental Protection (DEP) Section 319 Non-Point Source Program
- PA Dept. Environmental Protection (DEP) Stream Bank Fencing Program
- PA Dept. Environmental Protection (DEP) Waste Management Program
- PA Dept. Environmental Protection (DEP) Waterways Engineering and Wetlands
- PA Dept. of Transportation (PennDOT)
- PA Growing Greener Grant Program
- PA Turnpike Commission (PTC)
- PennVest Program
- Practice Keeper Reported Agriculture Best Management Practices (BMPs)
- State Conservation Commission (SCC) Dirt and Gravel Road Program
- State Conservation Commission (SCC) Resource Enhancement and Protection Program (REAP)
- United States Dept. of Agriculture (USDA) Rural Development Program

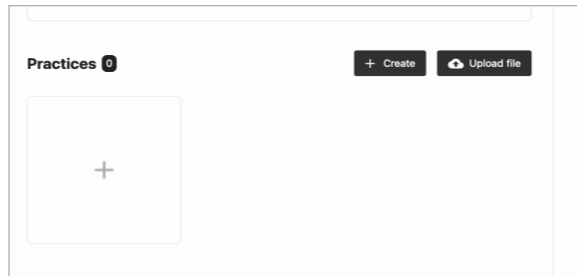


## Step 7. Add Practice(s) to your project (required)

Practices refer to the on-the-ground restoration work you and partners are implementing for your Countywide Action Plan. Nutrient and sediment reductions are calculated for each practice after completing all inputs.

**TIP:** Some practices have models that calculate the N, P, and TSS reduced. Each practice description indicates if FieldDoc has linked a model to it.

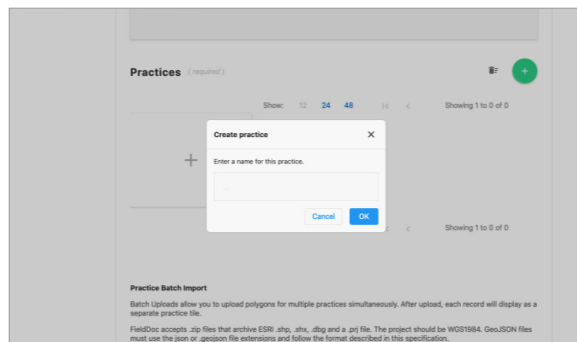
+ Create



### Option 1. Add practices individually

On your site summary dashboard, click the plus sign under **Practices** to add a new practice.

Each practice you implement will need its own tile.



### Name your practice

To get started, give your practice an easy-to-reference name and tap OK. This name is not tied to anything in the system but will help you refer back to the practice throughout the project period.

Upload file

**Tips**

In addition to the mandatory **.shp**, **.shx**, and **.dbf** files, shapefile archives must include a **.prj** file that describes the coordinate system and projection. All files must be compressed into a **.zip** file before uploading. To ensure that FieldDoc reads the archive correctly, the archive itself and the files it contains should share the same name. File names must not contain spaces.

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Batch import is optimized for 100 sites or fewer. Refer to our [help documentation](#) for more guidance on batch imports and upload requirements.

Browse... No file selected.

Cancel Upload

### Option 2. Import multiple practices

The importer allows you to create multiple practice tiles simultaneously. The importer accepts **.zip** files with archived ESRI files: **.shp**, **.shx**, **.dbg**, and a **.prj** (WGS1984). The system is optimized for 500 sites or less.

FieldDoc will separate each polygon as a separate practice that will appear as a unique tile in FieldDoc.

Once you have imported your file you will enter into each practice tile to add a description, select the **Practice Type**, and confirm the practice name.

## Step 8. Add Practice Details

Practices include location, footprint, modeled calculations, and metric targets.



**TIP:** Each restoration practice will require a separate entry and tile.

**TIP:** To help keep you on the rails as you enter your practice information, FieldDoc indicates the next item wehre

Projects / Demonstration Project / Practices / Forest Buffer / Edit practice

### Edit practice

Use the below form to enter a name, description, practice type, and privacy status for your practice.

**Name**  
Forest Buffer  
A name is required.

**Description**  
Descriptions may contain up to 1,500 characters, including spaces and punctuation. (0 used)

**Practice type**  
A practice type is required.  
[Click here to select a type for this practice.](#)

**Site**  
Sites are an optional way to organize your practices. To use sites, first create one or more via the [project summary](#) page. Please note that un-named sites will not appear in the dropdown list. If you do not wish to use a site with this practice, leave this field blank.  
Search project sites

**Privacy**  
Off  On  
This practice is private. It can only be viewed and edited by project collaborators and program managers. Geographic data related to this practice will not appear on dashboard maps.

### Add details to your new practice

#### Name

Give your practice an identifiable name. Naming is up to your discretion.

#### Description

Describe your practice here. Description is up to your discretion for additional detail.

#### Practice Type [IMPORTANT. VIEW BELOW]

Click the link to search through and select a practice type. Each practice will have individual instructions for what inputs are required to calculate the estimated reductions. If you do not see your practice listed here, contact your program manager.

#### Sites

If you are relating your practice to a site, select your site here. If no site is associated, please skip this step.

#### Privacy

Public = Off, Private = On. Private practices will not appear on dashboard maps. Public is preferred, but private is an option.

#### IMPORTANT NOTE:

For most practice types, FieldDoc calculates reductions to sediments and nutrients based on the practice type, the land river segment, and the practice extent, which is often acreage.

Some practice types may require additional inputs. These additional steps appear on the metrics page, when required.

Projects / Demonstration Project / Practices / Forest Buffer / Edit practice

### Edit practice

**Select practice type**  
This program contains 287 practice types. Type in the box below to search practice types by name or use the letters to browse the list alphabetically.  
Find a practice type...

Go to: A B C D E F G H I L M N O P R  
S T U V W

**A**  
Abandoned Mine Reclamation  
NATURAL - ABANDONED MINE RECLAMATION  
Abandoned mine reclamation stabilizes the soil on lands mined for coal or affected by

### Select practice type

Scroll or search through the program's list of practices to select your practice type.

Review the description to confirm you have selected the most relevant practice. Each practice type has a unique list of metrics and model calculations tied to it.

Click the circle and then confirm your selection. The practice type appears on your Edit Practice page.

## Step 9. Add Location polygon to your practice

Refer to the **Practice Type** description to confirm if the practice footprint or practice drainage area should be delineated. All practice footprints may be drawn as points, lines, or polygons. Practice footprints are limited to the appropriate delineation tools.



Projects / Demonstration Project / Practices / Forest Buffer / Edit location

### Edit location

**Practice type**  
Forest Buffer - Agriculture

Forest buffers are linear wooded areas that help filter nutrients, sediments and other pollutants from runoff as well as remove nutrients from groundwater. The recommended buffer width is 100 feet, with a 35 feet minimum width required. FieldDoc calculates the estimated reductions using acres. Location should display the footprint of the practice.

**Address**

Search

**Estimated practice extent**  
Unable to calculate estimated extent.

**Draw practice location**

If you do not have GeoJSON data or a shapefile of your practice area then you can draw your practice directly on the map. To draw a polygon, select the square polygon draw tool, second from the top of available tools. Estimate your practice area and double click to complete the shape. FieldDoc uses the delineated polygon area to perform model calculations.

**IMPORTANT:** Reference the practice type description for instructions on which geometry type to use to delineate your practice footprint.

**Upload GeoJSON or an Esri Shapefile**

In addition to the mandatory **.shp**, **.shx**, and **.dbf** files, shapefile archives must include a **.prj** file that describes the coordinate system and projection. All files must be compressed into a **.zip** file before uploading. To ensure that FieldDoc reads the archive correctly, the archive itself and the files it contains should share the same name. File names must not contain spaces.

GeoJSON files must use the **.json** or **.geojson** file extensions and follow the format described in [this specification](#). We recommend testing GeoJSON data with [geojson.io](#) before uploading it to FieldDoc. See [here](#) for more help with the GeoJSON format.

Regardless of type, file uploads cannot exceed 20 MB. For shapefile archives, this is the maximum total size of all **un-compressed** files.

Browse... No file selected.

### Option 1. Draw your polygon.

Use the address finder to zoom in on the map. Click on the Layers Icon and switch the basemap to "Satellite" in order to better delineate a parcel boundary.

Then use the Polygon tool to draw the location boundary. Click the green save button to confirm the location.

### Option 2. Upload your polygon.

Any ESRI shapefile upload must be packaged as a .zip file that includes the following: a .shp, .shx, .dbf, and .prj file. The coordinate system and projection should be WGS1984.

Each file can only have one record associated with it. If your file includes multiple polygons make sure to dissolve the features into one record.

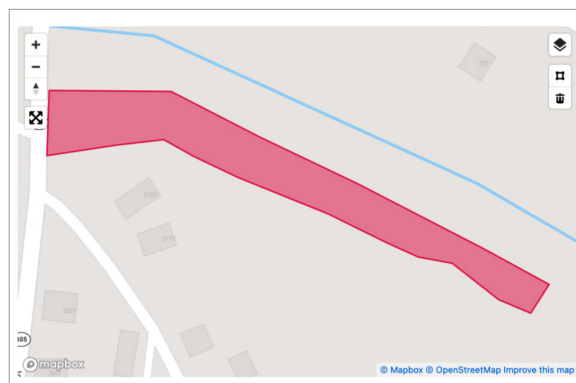
save your inputs



navigate to summary page



**TIP:** The final geometry can be edited or deleted. To edit, double click on the geometry, hover your mouse over the geometry and then click and drag points.



### Review your Polygon.

Save your polygon. A red shape will appear on your map. The system recognizes this as the practice extent for your project.

## Step 10. Add Practice Metrics

Now you can take the final steps to calculate FieldDoc-generated metrics and add manual metrics. For practices where additional inputs are required to calculate reductions, you will click on **modify inputs** under model inputs.



Projects / Drexel BMP API Sandbar / Sites / Site 1 / Practices / Riparian Forest Buffer / Metric targets

### Metric targets

The metrics listed here are associated with the **Riparian Forest Buffer** practice type. Assign targets to this practice by entering a numeric value for one or more metrics.

#### Practice type definition

**Riparian Forest Buffer**  
Linear strips of wooded areas maintained on agricultural land between the edge of fields and streams, rivers or tidal waters that help filter nutrients, sediment and other pollutants from runoff. These buffers are usually between 35-100 feet in width.

#### Practice extent

FieldDoc generates the practice footprint based on the length or area of its geometry. Many models and practice types use this number to calculate estimated nutrient and sediment reductions and other modeled parameters. To generate estimated reduction calculations, enter an extent value for the requested unit in the provided field.

Estimated area value 1,424.00 acres

Enter acres of practice footprint.

Custom area value  acres

#### Model inputs

Drexel(ANS BMP API)  
[Model summary](#)

#### Add metric

Automated and manual metrics can be added to this practice using the search form below. If you're not sure where to start, please [follow this link](#) to see a list of available metrics.

**Add metric**  
Miles of forested buffer restored within focus areas

#### Active targets

Enter a target value for each metric manually added to this practice. Automated metric targets cannot be edited.

<b>Pounds of total nitrogen reduced</b> <small>This is an automated, modeled metric and cannot be edited.</small>	35.53
<b>Pounds of total phosphorus reduced</b> <small>This is an automated, modeled metric and cannot be edited.</small>	3.23
<b>Pounds of total suspended solids reduced</b> <small>This is an automated, modeled metric and cannot be edited.</small>	1,572.40

Miles of forested buffer restored within focus areas

### Select Project Target Metrics

#### Practice Extent

The system generated the extent based on the geometry submitted on the location page. You can override and enter a custom area here. Your custom extent will be used in calculations.

#### Modeled Inputs

For practices that require additional inputs to calculate reductions, you will click here to enter a separate page where you can enter the relevant values.

#### Add Metric

Search the system for manual metrics to add to this practice. All metrics will roll up to display in aggregate on the project summary page.

#### Active Targets

Automatically, N, P, and TSS values will appear here. You cannot edit these values. Assign targets for manually added metrics. Targets indicate the value assumed at the completion of the proposed work.

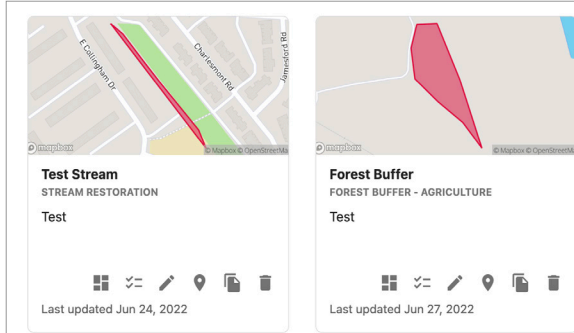
Click the check marks to save your work in each section.

## Repeat, Restore, Report

Repeat the steps to add additional practices to your project. When you are ready to report installation program you will enter into each practice summary page. Navigate to the bottom and add a new Installation Report.

## Step 11. Add Implementation Reports via the Reporting Modal

Document implementation progress with Reports. Reports are found at the bottom of each practice tile on the project summary page or via the right hand ribbon on the practice page. Multiple reports can be entered per practice.



### Add a report

On your practice tile, click the checklist icon to enter the reporting module. From here you can make edits to your practice and add implementation reports.

Each practice has a reporting module that invites users to share various pieces of information. Sections are segmented with tabs. Find the relevant tab, enter your information, and then tap Save in the bottom right hand corner. We will walk through all tabs here.

**Practice Extent** When necessary, use this tab to change the extent of the BMP installation footprint. This field may be used in modeled calculations.

**Reports and metrics for Test Stream** ✕

---

Practice extent    Metric goals    Model inputs    Reports    Completion status    Inspection log    Partners

---

FieldDoc calculates extent based on the dimensions (area, length, etc.) of a practice's geometry. Many models and practice types use this number to calculate estimated nutrient and sediment reductions and other modeled parameters.

FieldDoc uses the World Geodetic System (WGS84, EPSG:4326) as its reference coordinate system. Note that the estimated extent value produced by FieldDoc may differ from values produced by other systems that process geospatial data. Please use the "Custom" input below if you need to override the FieldDoc-generated extent.

<p><b>Estimated length</b></p> <p>729.49 linear feet</p>	<p><b>Custom length</b></p> <div style="border: 1px solid #ccc; padding: 5px; display: inline-block; margin-bottom: 5px;">729.49</div> linear feet
--	--

Cancel
Save

## Step 12. Reporting Modal, continued

**Metric Goals** Reference your automated and manually tracked metrics from this module page. Automated metrics appear wrapped in gray boxes. Manually entered and tracked metrics appear with a check mark so that you can save changes.

**Reports and metrics for Test Stream**
✕

Practice extent
**Metric goals**
Model inputs
Reports
Completion status
Inspection log
Partners

**Add metrics to this practice**

Automated and manual metrics can be added to this practice using the search form below.

**Search metrics**

...

**Active targets**

Enter a target value for each metric manually added to this practice. Automated metric targets cannot be edited.

**Pounds of total nitrogen reduced** 0.00

*This is an automated, modeled metric and cannot be edited.*

**Pounds of total phosphorus reduced** 0.00

*This is an automated, modeled metric and cannot be edited.*

**Pounds of total suspended solids reduced** 0.00

*This is an automated, modeled metric and cannot be edited.*

Total length of stream restoration (feet)  ✓ -

Cancel Save

**Model inputs** Some practices may require additional inputs in order to run the model. Click the “Modify Inputs” button to input additional information.

**Reports and metrics for Test Stream**
✕

Practice extent
Metric goals
**Model inputs**
Reports
Completion status
Inspection log
Partners

This conservation practice is linked to one or more automated models that calculate estimated values for the parameters listed below. When you add the required inputs, FieldDoc will run the model behind the scenes and display metric outputs in the practice summary. If these metrics don't appear in the practice summary, it means that FieldDoc was unable to supply the model with sufficient and/or valid data for this practice type.

[Stream Restoration Load Reduction Estimates \(Protocols 1 - 5\)](#)

**Modeled metrics**

Pounds of total nitrogen reduced ✔

Pounds of total phosphorus reduced ✔

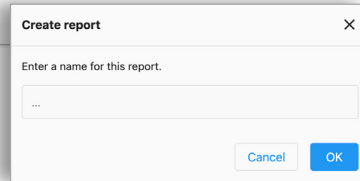
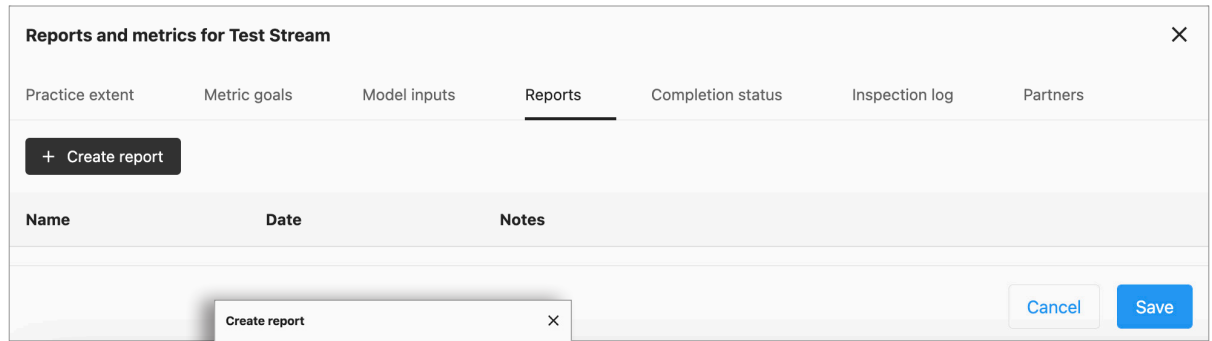
Pounds of total suspended solids reduced ✔

✔ Modify inputs

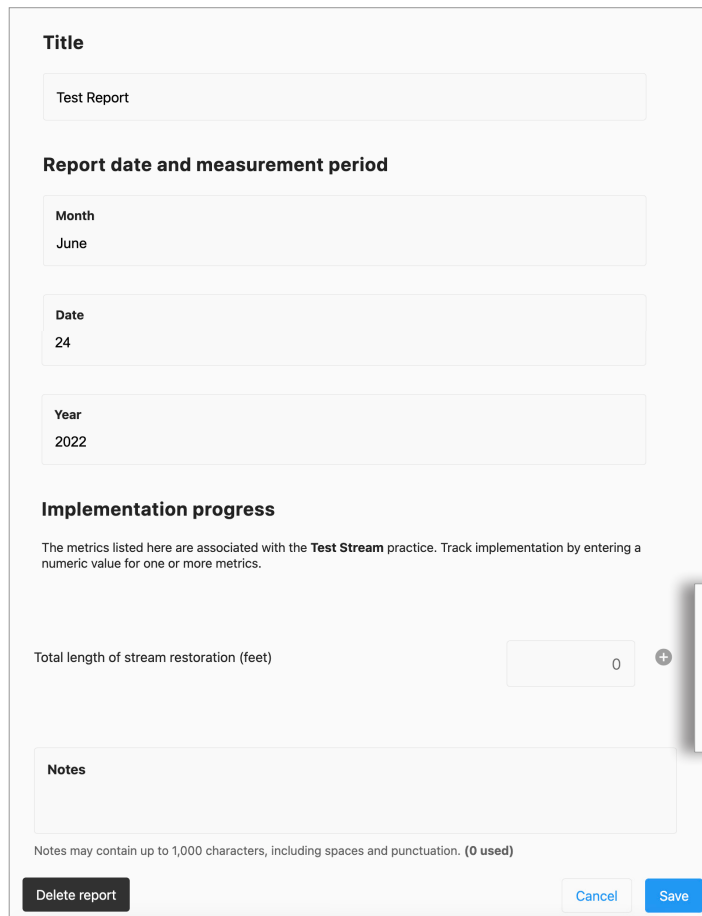
Cancel Save

## Step 12. Reporting Modal, continued

**Reports** Add installation reports throughout your project life span to track progress towards targets and include notes on work completed.



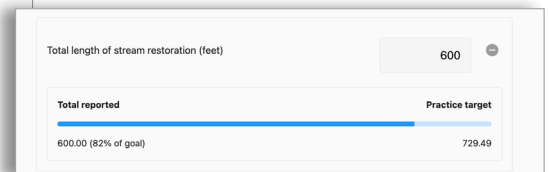
Click "Create Report". Name your Report. Click OK.



Enter in your report information.

You only need to enter in progress to date on manually tracked metrics.

Click the plus circle for each metric added and make sure to save your entry. The page will update to show reported progress towards targets.

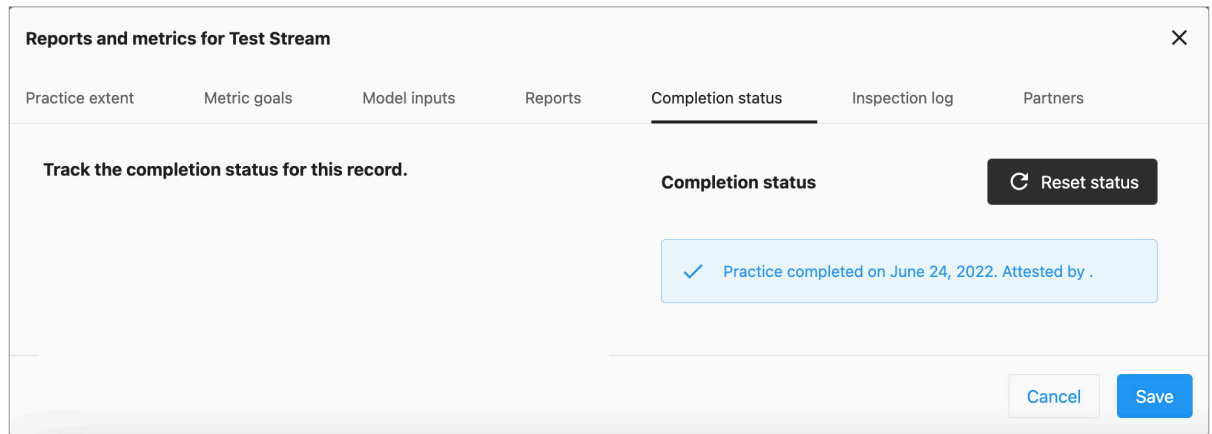


Add additional notes, if desired.

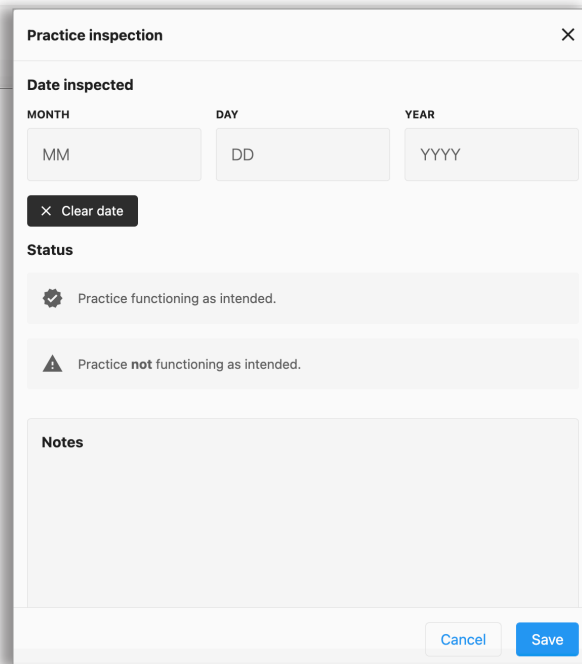
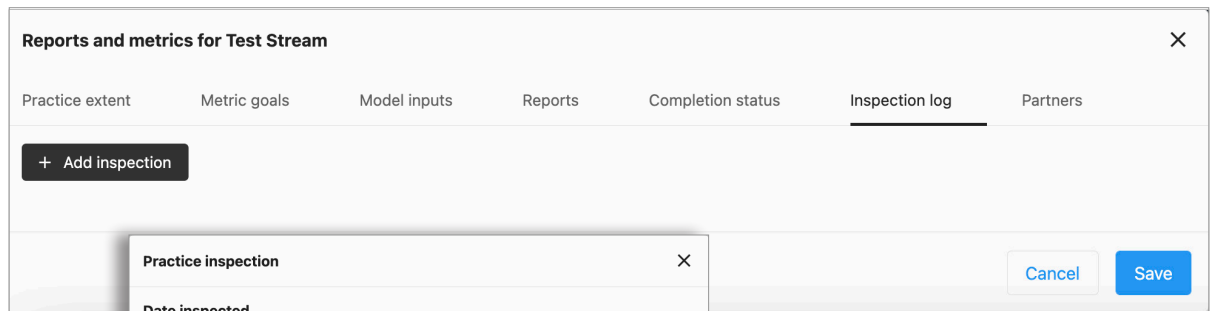
Once you have completed your report. Click save.

## Step 12. Reporting Modal, continued

**Completion Status** Once you have completed the installation of this conservation practice, you can change the status.



**Inspection Log** Once you have completed the installation of this conservation practice, you can change the status.



Click "Add Inspection".

A pop-up modal will appear where you can enter the date that the practice was inspected. Select the functioning status and add any notes.

Once all fields are entered, click save.

The inspection report will appear in the log.



## Step 12. Reporting Modal, continued

### Partners

You can add and delete any project partners on this page. If you need a partner that you cannot find on the list, contact [support@felddoc.org](mailto:support@felddoc.org).

**Reports and metrics for Test Stream** [Close]

Practice extent   Metric goals   Model inputs   Reports   Completion status   Inspection log   **Partners**

**Add program partners to this practice**  
 Program partners can be added to this practice using the search form below. These programs will receive data updates from this practice but do not impose additional management requirements.

**Active partners**  
 State Conservation Commission (SCC) Resource Enhancement and Protection Program (REAP) [Remove]

**Search programs**  
 ...

[Cancel] [Save]

If your practice is fully funded by their Countywide Action Plan, select “CAP Implementation Funding Only”. Select “CAP Implementation Funding with Partners” if the practice is partially funded by your Countywide Action Plan and then select all additional partners to include in this list.

## Where to go for help

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This **Getting Started Guide** skims the surface of how to use FieldDoc to track your restoration work and its impact on reducing pollutants.

For more information, check out our [online help documentation](#) to read detailed articles on all components of FieldDoc and watch videos walking through the project build process.

For FieldDoc Training Webinars please visit the [Pennsylvania Clean Water Academy](#). These recorded webinars will go through how to maximize your experience with using FieldDoc to support Countywide Action Plan implementation.

If you're stuck, reach out to your county coordinator.