



Watershed Plan Implementation Tracking Platform User Guide

Watershed Planning and Reporting

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ABOUT THIS DOCUMENT

This user guide is designed to help users of the Watershed Plan Implementation Tracking Platform (WPI-TP or “the Platform”) navigate and use it effectively. This document provides step-by-step guidance, answers to frequently asked questions, troubleshooting support, and information on where to find additional help. Use the quick start guide below or refer to the detailed sections for more in-depth instructions.

QUICK START GUIDE

Creating an Account

- **Check your email:** Look for a message from the WPI-TP administrator (complete within **7 days**)
 - **Click the link:** Open the account setup page
 - **Enter details:** Provide your name, title, organization, password, etc.
 - **Complete setup:** Confirm to create your account and log in
 - **Bookmark:** Save the login page for easy access
 - **Need help?** Contact WPIimplementation@trca.ca if you don't receive the email or if the link expires
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Navigating the Dashboard

- **Resources:** Access the User Guide, watershed plans, management framework, and maps (review before creating initiatives)
 - **My Initiatives:** View and manage your projects
 - **Create New Initiative:** Start a new project entry
 - **Change Password:** Update login credentials anytime
 - **Logout:** End your session securely
 - **Tip:** Explore each option to get familiar with the layout
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Reviewing the Resources Section

- **Open Resources:** Navigate to the Resources section of the Platform where you will find:
 - **User Guide:** A link to this User Guide is also included in the Resources section for easy reference
 - **Full Plan:** Access the complete watershed plan for reference
 - **Framework:** Review the management framework (goals, objectives, management actions)
 - **Maps:** Explore available maps, including prioritization maps linked to management actions
 - **Tip:** Review Resources before creating an initiative so you can align your project with the correct goal(s), objective(s), and management action(s)
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Creating a New Initiative

- **Start from:** Dashboard (**Create New Initiative**) or **My Initiatives** page
 - **Project Info:** Add project name and description
 - **Dates:** Select start and end dates (*approximate is fine*)
 - **Status:** Enter current status, status date, and status description
 - **Plan Linkage:** Select watershed plan → goal(s) → objective(s) → management action(s) (*multiple selections allowed; dropdowns expand as you go*)
 - **Submit:** Click **Submit** – your initiative will now appear under **My Initiatives**
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Updating a Project Status

- **Start from:** My Initiatives (**Edit Status**) or View Initiative (**Manage Status**)
- **Select Status:** Choose from the dropdown menu (Potential, Planned, In Progress, Completed)
- **Enter Date & Description:** Record the date and provide a brief description of the current status
- **Submit:** Click **Submit** to save your changes
- **Tip:** Editing replaces the existing status entry. To track progress over time, consider adding a new status entry while keeping previous records

1.0 CREATING AN ACCOUNT

To create your account on the Platform:

1. **Check your email** – You will receive a message from the WPI-TP administrator with a unique account setup link. You must complete this step within **7 days** of receiving the email, or the link will expire. If this occurs, we can resend the link.
2. **Click the link** – Select the link provided in the email to open the account registration page.
3. **Enter your details** – Follow the prompts to provide your user information (e.g., name, title, organization, password, etc.).
4. **Complete setup** – Once you have entered your details, select Submit to create your account. You will receive another email to confirm that your account has been created and you can then log in using your new credentials.
5. **Save the login page** – For easier access in the future, consider creating a bookmark for the Platform's login page in your web browser.

Note: If you do not receive the setup email or encounter any issues, please check your spam/junk folder first. If the email is not there, contact the WPI-TP administrator for support. Emails will be sent from WPIImplementation@trca.ca, and this is also the support email address.

2.0 NAVIGATING THE DASHBOARD

Once you log in to the Platform, you will arrive at your **Dashboard**. This is your central hub for accessing and managing information within the Platform. The Dashboard Menu includes the following options:

- **Resources** – Access key background materials, including this User Guide, the full watershed plans, the management framework, and associated maps (including prioritization maps). Reviewing these resources is recommended before creating a new initiative.
- **My Initiatives** – View and manage all initiatives you have created or that are assigned to you. From here, you can track progress, edit an initiative, view an initiative's details, and review and edit an initiative status.
- **Create New Initiative** – Start a new initiative by entering the required details and submitting it for tracking. Use this option whenever you want to add a new project or action under the watershed plan.
- **Change Password** – Update your login credentials at any time for improved security. It is recommended that you update your password periodically.

- **Logout** – End your session and securely exit the Platform. Always log out when you are finished, especially if you are using a shared or public computer.

Tip: Spend a few minutes exploring each option to get comfortable with where things are located and how they work. This will make it easier to navigate the Platform and complete tasks efficiently.

3.0 REVIEWING THE RESOURCES

The **Resources** section of the Platform provides key background materials to support the creation and tracking of initiatives. It includes:

- **User Guide** – A link to this User Guide is also included for easy reference while using the Platform.
- **Watershed Plan Implementation Tracking Hub** – A link to the online StoryMap collection that provides users with an interactive way to explore the implementation of the recently completed watershed plans in the Toronto Region. This is the public facing portal for implementation tracking.
- **Full Watershed Plan** – A link to access the complete version of the watershed plans for reference.
- **Management Framework** – A direct link to the section of the plan that outlines the framework of goals, objectives, and management actions.
- **Maps** – A collection of maps, including prioritization maps that are tied to certain management actions. These maps help identify where specific initiatives may be most needed or impactful.

Recommendation: We strongly recommend that you review the **Resources** section before creating a new initiative. Familiarizing yourself with the relevant goal(s), objective(s), and management action(s) will help ensure your initiative is accurately linked to the watershed plan.

4.0 CREATING NEW INITIATIVE

You can create a new initiative in the Platform in two ways:

- From the **Dashboard** by selecting **Create New Initiative**.
- From the **My Initiatives** page by selecting the option to **Create New Initiative**.

Follow the steps below to set up your initiative:

1. **Enter Project Details**
 - **Project Name** – Provide a clear, descriptive title.

- **Project Description** – Add a brief explanation of the initiative, including key activities or outcomes.

2. Select Dates

- **Start Date** and **End Date** – Choose a month, day, and year.
- *Note:* While you must select specific dates, they do not need to exactly match the project's timeline. Approximate dates are acceptable.

3. Enter Status Information

- **Current Status** – Indicate the initiative's current stage (e.g., potential, planned, in progress, completed).
- **Status Date** – Enter the date that the current status was recorded.
- **Status Description** – Provide details to explain the current status of the project.

4. Link to the Watershed Plan

- **Watershed Plan** – Select the relevant plan from the dropdown menu.
- **Goal(s)** – Choose one or more goals that align with your project.
- **Objective(s)** – Select one or more related objectives.
- **Management Action(s)** – Select one or more applicable management actions.
- *Note:* As you make selections, additional dropdown menus will appear, allowing you to further define your choices.

5. Submit the Initiative

- Once all information is entered, select **Submit**.
- Your new initiative will now appear in your **My Initiatives** list, where you can review and edit details as needed.

Tip: If you are unsure about exact dates or which plan components apply, enter your best estimate. You can always return later to update the initiative with more accurate information.

4.1 Project Status Definitions

- **Potential** – Projects that are being considered and could move forward **if they receive funding or necessary approvals**. These initiatives are not yet confirmed.
- **Planned** – Projects that have **secured funding or resources** but have **not yet started**. Planning and preparation may be underway.
- **In Progress** – Projects that are **actively underway**. Work has started and tasks are being executed toward completion.
- **Completed** – Projects that have **finished all planned activities** and have met their objectives. No further action is required.

5.0 UPDATING A STATUS

You can update the status of an initiative in the Platform in two ways:

- From the **My Initiatives** page by selecting **Edit Status** next to the initiative you want to update.
- From the **View Initiative** page by selecting **Manage Status**.

Follow these steps to update the status:

1. **Select Status** – Choose the appropriate status from the dropdown menu (e.g., Potential, Planned, In Progress, Completed). See [4.1 for Project Status Definitions](#)
2. **Enter Date and Description** – Provide the date the status applies to and a brief description explaining the current status of the project.
3. **Submit** – Click **Submit** to save your changes.

Important Notes:

- Editing the status will **update the existing status entry**.
- If you want to **add a new status entry** instead of replacing the previous one, you can keep a record of prior statuses. This helps track the project's progress over time.

6.0 NOTES FOR IMPLEMENTERS

- **Confirm the Project Lead:** At the start of any collaborative project, identify the **project lead**—the person responsible for tracking the initiative in the Platform. This ensures accountability, accurate project updates, and that a single project is not being counted twice in the reporting.
- **Spatial Component:** If your initiative includes a **spatial component** (e.g., a specific location, area, or mapped feature), indicate this in the **Additional Comments** section when creating the initiative and TRCA's Watershed Planning and Reporting team will reach out to get further information, as needed.
- **Resources:** Consult the **Resources** section of the Platform to review the **full management framework** for each watershed plan and to access **associated prioritization mapping**. This helps guide initiative planning and ensures alignment with broader watershed goals.

7.0 INITIATIVE EXAMPLES

7.1 Initiative Example 1

Project Name: Kerrison Wetland-Priority Restoration Area

- Only use hyphens without spaces “x-x” not “x – x”

Project Description: Implementation of wetland restoration (2.05ha), plantings (13,000 native trees and shrubs), stream restoration (1.5m), invasive management (1ha area treated), and trail realignment (500m additional trail added)

Start Date: February 22, 2022

End Date: November 13, 2024

Additional Comments: Planting and invasive removal polygons and trail alignment shapefile are available for this project. Please connect to transfer this data.

Status: Potential

Status Date: February 22, 2022

Status Description: Potential restoration work, but funding needs to be secured.

Status: Planned

Status Date: May 2, 2022

Status Description: Funding has been secured and project works are in the planning stage.

Status: In Progress

Status Date: May 3, 2023

Status Description: Site works have begun and the restoration work is underway.

Status: Completed

Status Date: November 13, 2024

Status Description: Project is now fully implemented and work is completed.

Management Action(s): 1.3.1, 2.1.3, 3.1.3, 3.2.1, 3.2.2

7.2 Initiative Example 2

Project Name: Municipal Green Standard (MGS)

Project Description: The Municipal Green Standard (MGS) were approved by Council in April 2022 and are now required for all new development and redevelopment within the Town as of May 1, 2022. The MGS is a tiered municipal green standard that establishes sustainability-related performance measures and design guidelines. More info at: [insert website link here](#).

Start Date: January 1, 2022

End Date: May 1, 2022

Status: Completed

Status Date: May 1, 2022

Status Description: Project is complete

Additional Comments: N/A

Management Action(s): 1.1.1

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