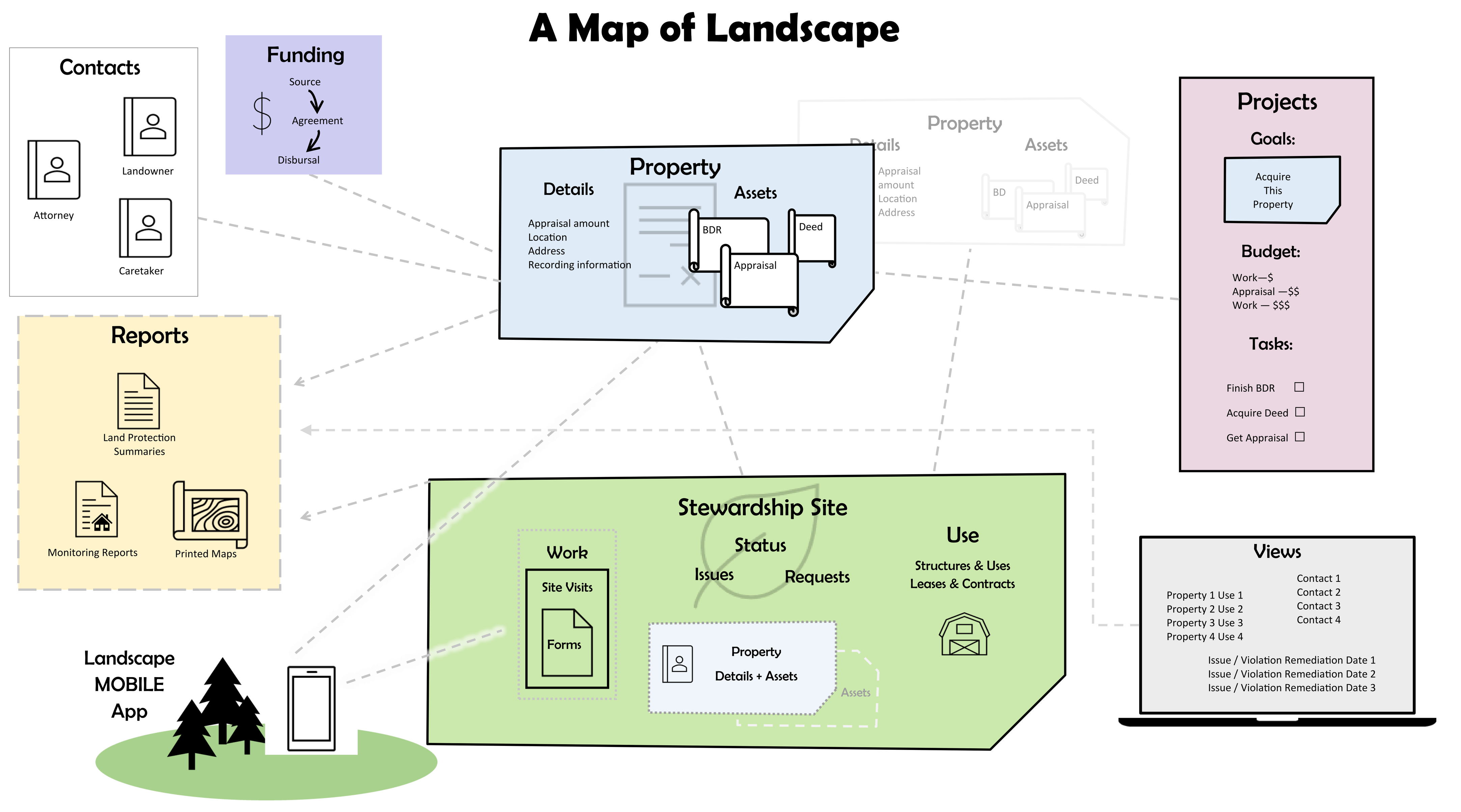
A Map of Landscape



Property

A **Property** is the most fundamental 'unit' of Landscape, and is designed to capture all of the information pertaining to your organization's current or intended interest in a piece of land. Commonly, an individual property record can be thought of as the result of one acquisition. It holds important information like recording date, acquisition method, and purchase (or donated) value. It also holds important records of your **work** in the form of **assets**, and those assets contain the documents pertaining to that work. Appraisals, BDRs, Recorded Documents (e.g. Conservation Easements) and Board Approvals are all examples of important assets.

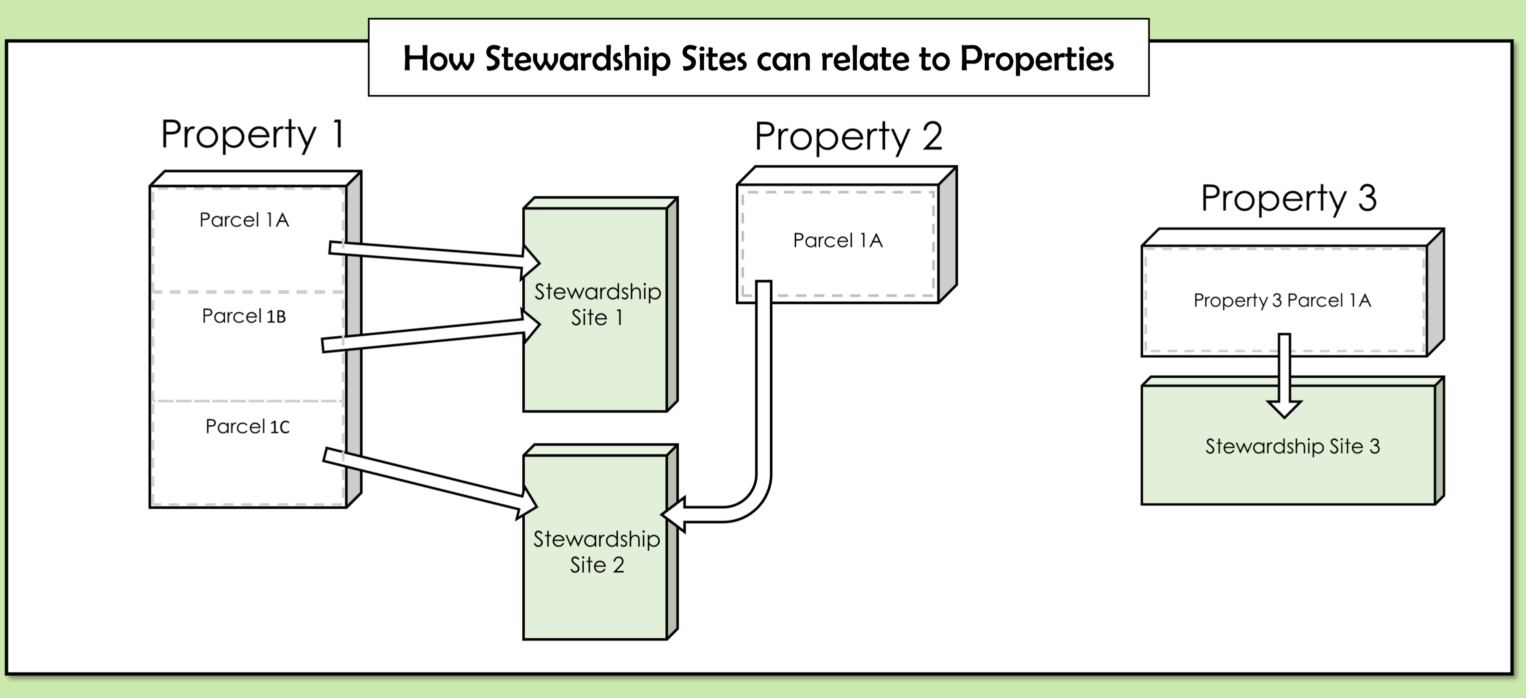
A property is made up of one or more parcels, which are associated with **contacts (ie. Landowners, Neighbors, Grantors, Partners, etc.)**. Parcels also contain the boundary for a Property record. Usually a single property is just made up of one parcel, but if for instance a property is subdivided multiple times and sold to different individuals, that property would have multiple parcels with multiple contacts.

The two most important fields in a property record are **Status** and **Interest. Interest** defines your interest or anticipated interest in the property (such as Conservation Easement or Fee Simple) **Status** options are:

- **Active or Inactive** — Properties you don't hold yet, but are working or have worked on acquiring. Inactive for those which have gone dormant. These two fields also have access to an additional **Stage** field, for simply tracking where the process is in its acquisition. See **Projects** for more on tracking acquisitions.
- **Current Holding** — A property on which you hold an interest, and often an accompanying management obligation
- **Partner Holding** — A property whose interest you never actually held, but assisted in protecting.
- **Disposed** — A property on which you held an interest at one time, but then disposed of that interest through sale, transfer, extinguishment, etc. You can also dispose of individual parcels within a property.

Stewardship Site

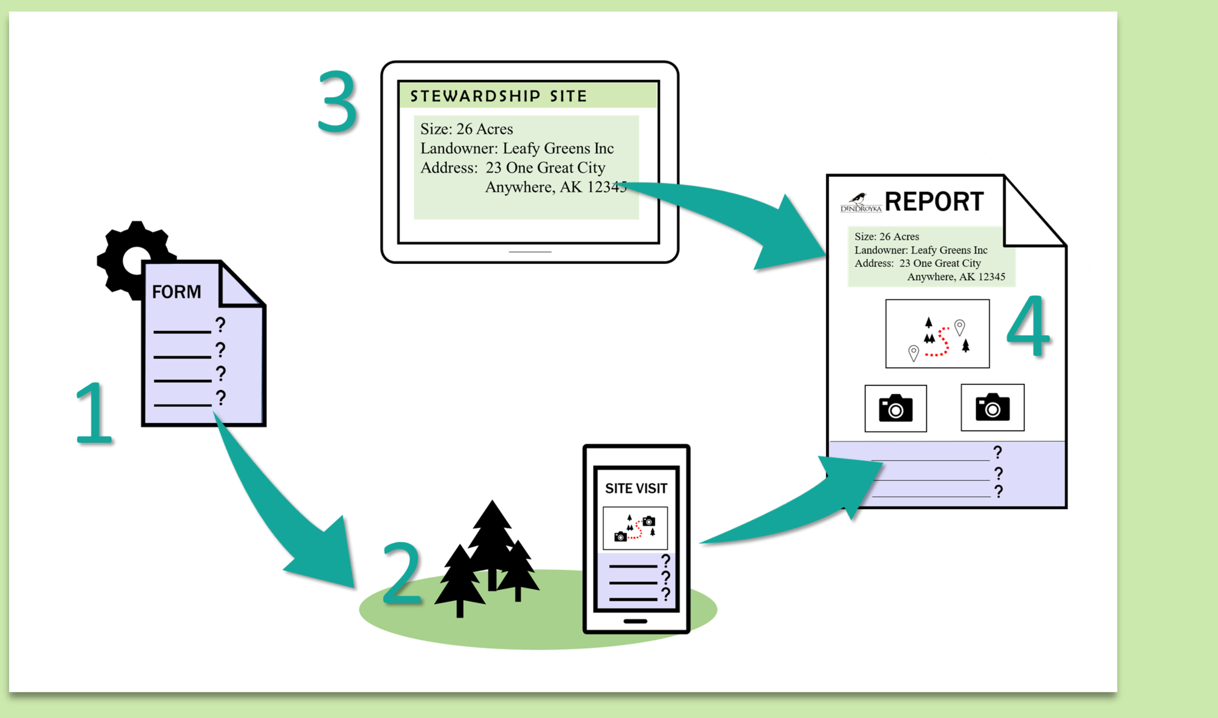
A **Stewardship Site** is how you manage your properties after they're acquired. Stewardship sites are for tracking **Site Visits**, **Issues** (violations, pending transfers, etc.), **Requests and Approvals**, **Structures** and their associated maintenance (trails, kiosks, easement restricted buildings), and **Leases**. Stewardship Sites are separate from Property records because you often need to manage multiple Property records as one 'thing', or because Properties can be subdivided and each parcel may need to be managed individually.



The **Work** tab is where you capture your **Annual Monitoring Visits** as **Site Visits.** Site Visits can also be any other kind of site visit, like a current conditions update, work party, or violation follow-up. Any time you're on site and want to capture photos and a track, you should use Site Visits. Site Visits have basic data fields like 'Summary', 'Methods', 'Date of Visit', and 'Personnel' (ie. Monitor Name), but if you want to ask specific questions during your visit you should use a **Form**. Forms can be built in Settings and then automatically associated with any type of Site Visit via the use of the **Site Visit Form Library**. This means that Landscape can know that every time you start a new Site Visit with a type of '**Annual Monitoring Visit'**, you can use the 'Annual Monitoring Form' that you've built. Once the Site Visit record is filled out, you can generate the final .pdf **Report**, which can merge data from the property record (like Address, Landowner Name, and Stewardship Site Name) with your site visit data

This shows the typical monitoring workflow in Landscape. After you build your monitoring form template in settings (1) you fill out that form, take photos, and a track with the Landscape Mobile App (2), once you're back at the office, data from the stewardship site and property record (3) like Landowner name and property address, are merged into your final monitoring report (4) using the Landscape Report function.

This means that after the form and report templates are built (we provide you with templates), all you need to do is gather the site visit data and generate the report with a few clicks!



The **Status** tab is where you track Issues and Rights and Approvals. **Issues** are great not only for tracking easement **violations**, but also any other thing that might need follow-up, such as pending property transfers, encroachments, and non-native invasive plant populations. Issues can have their own geography, meaning they can be mapped so that you know where on the Stewardship Site they're occurring. **Rights and Approvals** can be used to track requests and approvals. When you create a new entry in rights and approvals, you can designate what type of right/approval it is, how many allowances the landowner has, and then track the activity against those allowances. This means that you can enter requests as they are proposed, but you can also enter existing rights that the landowner hasn't acted on.

The **Use** tab contains tools for tracking **Structures and Uses** and **Leases and Contracts**. Structures and uses, since they can be mapped as well, are very useful for tracking trails, kiosks, and other infrastructure. You can also use them to keep track of restricted structures on easements, and set allowable limits on size (for example, if an easement has an impervious surface limit of 2000 sq. feet, you can set that amount and then track the existing structures against it). Leases and Contracts is where you log any leases on your stewardship sites, and it is also handy for tracking **3rd party easements** (ie., easements that don't belong to you).

Finally, since Documents can be stored alongside most of these records (monitoring reports get stored in site visit records, emails get stored in communications records, etc.), the **Documents** tab displays all of the documents and photos associated with the Stewardship Site and associated Property Record so you don't have to go digging through the various locations.

Projects

A **Project** is nothing more than a fancy to-do list. Projects can have replicable and customizable task lists, **budgets**, and can have multiple **goals**, but essentially are just used for organizing whether certain work items have been accomplished. This means that Projects can be used not only for acquisitions, but for managing other projects as well, such as large restoration projects or even your entire monitoring season. Projects need one or more Property or Stewardship Site records to serve as a target record. Without a target record, Landscape doesn't know where to store the completed work. It might be helpful to think of a Project as the grocery list, but a Property record (or Stewardship Site) as the fridge which stores everything you buy. If you have a task list which is more or less the same for every acquisition, you can simply build that task list in settings and then apply it to any new acquisition. These tasks can be moved, edited, deleted, or added as needed. Projects are excellent for making sure that all your due diligence has been done during an acquisition.

Reports

A **Report** can merge any data contained within Landscape onto a customizable template. The most common example is the Monitoring Report, which merges Property and Stewardship Site information, contact information, and site visit data (including a map and photos) into a single .pdf output. Other common reports are: Active Project Reports, to report on the status of your various acquisitions; Funding Reports, to report on the status of various funding obligations; and Baseline Report Photo Sheet, which can merge photos taken with the Landscape Mobile App onto a photo sheet alongside a map of your visit.

Reports can be generated one by one (record by record), or you can generate them in bulk using **Views**. You can even go one step further and save the workflow of bulk generating a certain report, so that common report workflows can easily be replicated

Views

Any of the data in your account can be viewed, sorted, grouped, filtered, or queried using Views. So, for example, if you want a list of all open Issues broken down by Type, or a list of all Properties grouped by County, or a list of all Issues by County, those are all potential Views.

Views can also be viewed as maps, meaning that you can visualize on a map where your open Issues are, or see where your remaining monitoring obligations are.

Dashboard Widgets are just ways of summarizing the data from views.

Views which you use often can be shared or saved for later use.

Contacts + Communications

Contact records capture data about different individuals or organizations affiliated with properties or projects. This relationship is managed through the use of **tags**. Most Property records, for example, have a Landowner listed as a contact. Grantor, Neighbor, and Partner are also common contact tags.

You can create **communications** with these contacts in property and stewardship site records. A communication record is a narrative of a phone call, email, letter, etc., that occurred between your organization and a contact record. You can also attach documents, such as .pdfs of emails, to communications.

Funding

Funding is tracked through **Funding Sources** (such as Internal Funding or a State Habitat Grant). Those sources can have individual **Agreements**, which can be managed independently. Expenditures from agreements or sources are tracked through **Disbursals**. Through project work/property assets, you can track not only funding for the purchase of a property, but any funding for any expense.

The Landscape Mobile App is used to collect **Site Visit Data,** most often for a Stewardship Site as an Annual Monitoring Visit. You can navigate the site, collect photos, a GPS track, and review documents and past site visit data, all completely offline!

You can map nearly any record in Landscape. It is important to remember that if you'd like to create or edit a layer ("geography") in Landscape, you must first create a record for that map geography to live in. For example, if you'd like to map the proliferation of certain non-native invasive vegetation on a property, you'll need to first create an actual Issue record within the appropriate Stewardship Site. That issue will then be visible and available to other maps, but to edit that geography later, you'll need to go back to that Issue record. Note that parcel boundaries are what are used to track property and stewardship site boundaries