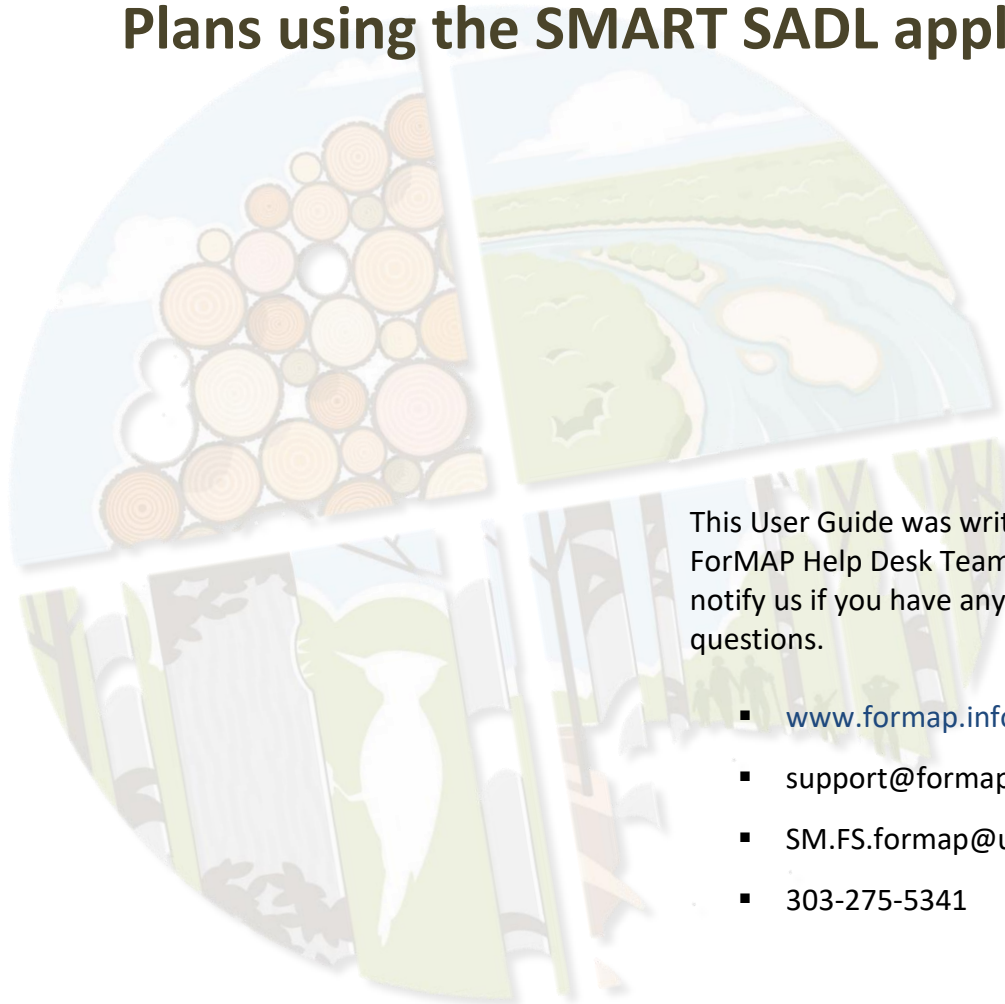


SADL User Guide

Stewardship Accomplishments Data Loader

A guide to uploading Management Plans using the SMART SADL application



This User Guide was written by the ForMAP Help Desk Team. Please notify us if you have any further questions.

- www.formap.info
- support@formap.info
- SM.FS.formap@usda.gov
- 303-275-5341



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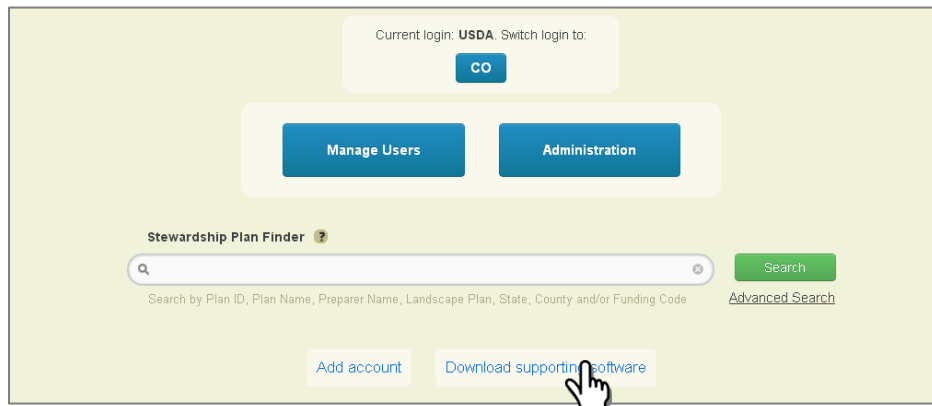
Stewardship Accomplishment Data Loader (SADL)

The Stewardship Accomplishment Data Loader (SADL) is a downloadable desktop application that interfaces with the Stewardship Mapping and Reporting Tool (SMART) web application. It was developed for states that do not use SMART as their main Management Plan writing and reporting tool. It allows states to enter annual accomplishment reporting information, as a shapefile comprised of a property boundary and associated fields, into the SMART database.

*Please note – this tool is only available for use by SMART State Administrators. Plan Preparers and Plan Approvers do not have the SMART permissions needed to perform SADL uploads.

Downloading the SADL:

1. From your SMART home page select the **Download supporting software** link at the bottom of the page.



2. Select **Get the SADL Tool**. This will begin the process of downloading the SADL.exe file to your computer. From this page you may also view the SADL Guidance page, including usage notes and shapefile specs (included at the end of this document).

Download SMART Software Logged in as Joshua Baldwin | Home | Help




SMART Desktop

The SMART Desktop program is intended for foresters that do not have a reliable enough internet connection to use SMART Web. SMART Desktop allows you to create stewardship plans and upload the Plan data to SMART Web when you have a sufficient internet connection. Please note that all active Stewardship Plans must be uploaded from Desktop to Web for federal reporting requirements.

[Get SMART Desktop](#)

SADL Tool

The Stewardship Accomplishment Data Loader (SADL) tool allows State Administrators to upload multiple stewardship plans in Shapefile format, with minimum required attribution. This should be used to load any active Forest Stewardship Plans not being entered into SMART by other means.

[Click here to view the SADL Guidance online.](#)

[Get the SADL Tool](#)

ShapeUp

Use ShapeUp to visualize your Shapefile files and copy them into SMART for any mapped object.

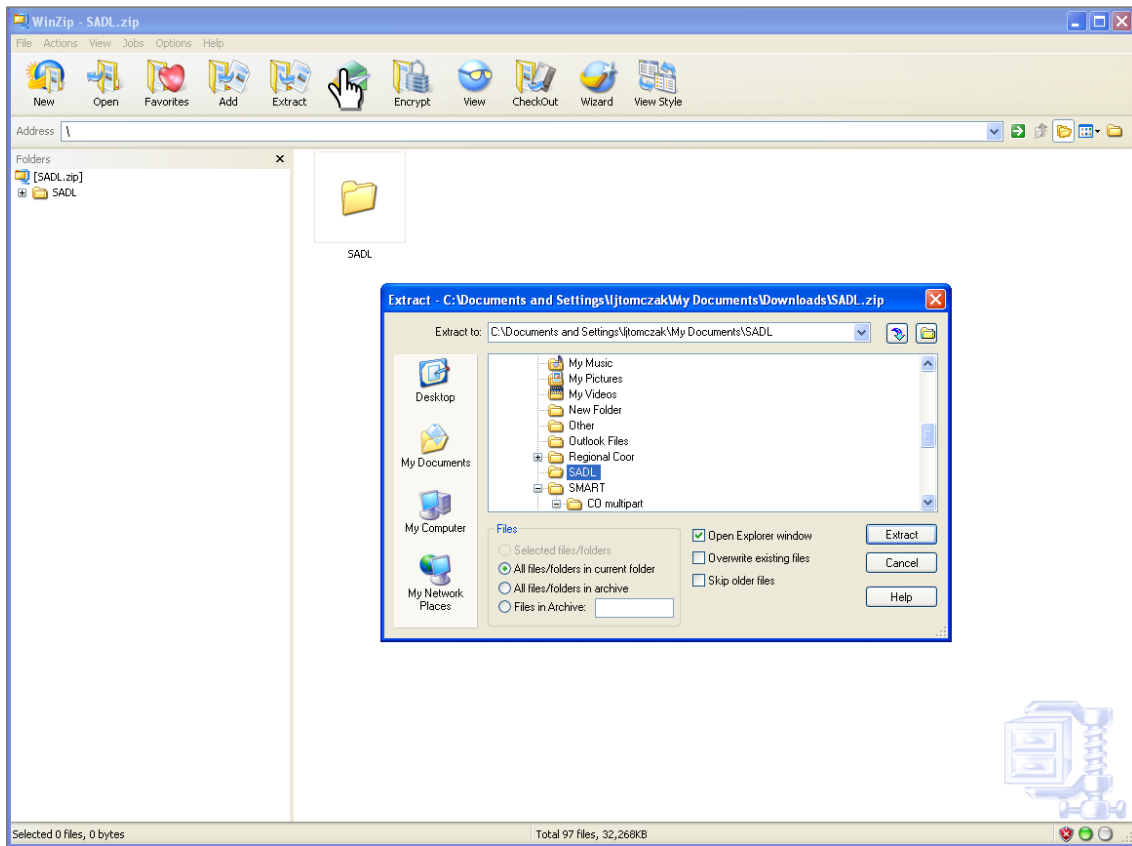
[Get ShapeUp](#)

ShapeUp Add-In for ArcMap

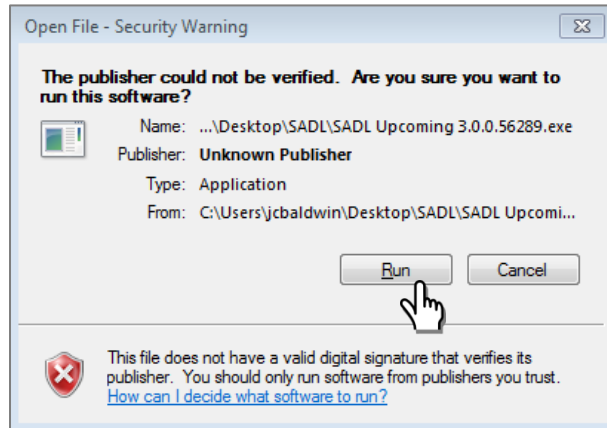
The ShapeUp Add-In for ArcMap is an add-in tool for the ESRI ArcGIS for Desktop software, and will allow you to select and copy shapes from within ArcGIS into SMART for any mapped object.

[Get the ShapeUp Add-In](#)

3. Save the SADL.exe to a convenient location on your computer.



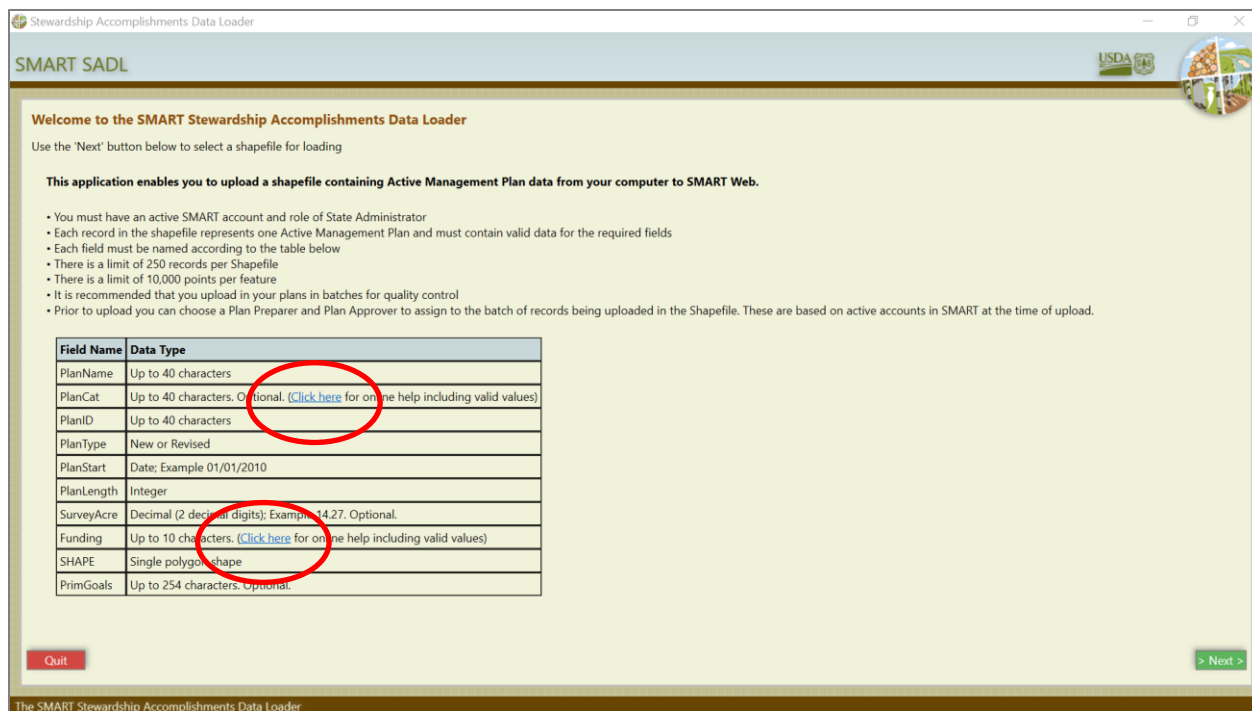
4. Navigate to the location of the downloaded file and double-click the SADL.exe file. If you do not have administrative privileges for your computer, you may have to get permission from your IT department. If you are using a USDA Forest Service issued computer, you may need to right-click the file and select “Run Elevated”. Also note: if you get a message that “The publisher cannot be verified” simply select the run button. Finally, follow through all the steps necessary to install the program onto your computer. This may include installing some dependent Microsoft software.



Uploading plans with the SADL:

The program should now be installed on your computer. You may open the program from the Windows start menu, or depending on your local installation protocols, from the icon on your desktop.

The SADL application will open to its main page. Here you will find general SADL information and data requirements.



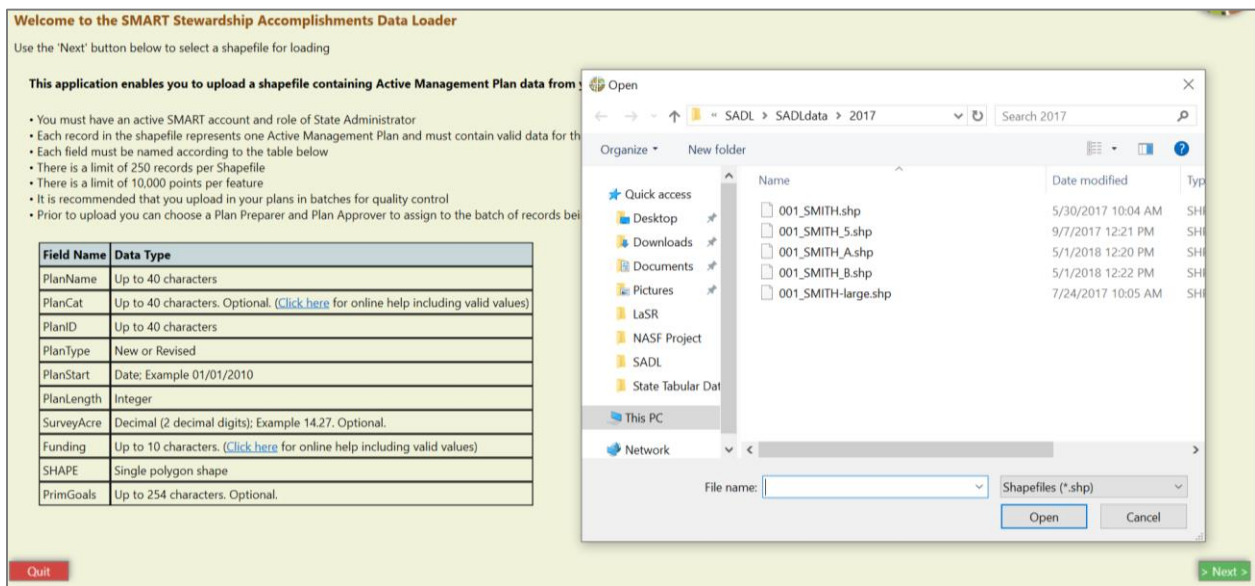
Please review the SADL Guidance page by clicking on the blue hyperlink within the PlanCat or Funding field. It is also included at the end of this document. It is very important that your Shapefile is formatted correctly with the required data fields below. The fields may be in any order and you may have other fields in the attribute table of your shapefile. Any extraneous fields will be ignored during the upload. A SADL shapefile template file is available on our Help Desk website: <https://www.formap.info/user-guides-webinars/>.

1. Select the Next button to begin the upload process. Data fields:

- PlanName
- PlanCat (This field is optional. However, if you do include it in the shapefile you will have to populate it with one of the management plan types found on the included spec sheet. If you have any questions about what each of these plan categories refer to, please see the included Plan Categories document on page 11.)
- PlanID
- PlanType
- PlanStart
- PlanLength
- SurveyAcre
- Funding (This is a new field for the SMART V5 SADL. This field is required. Please see the list of possible funding categories at the end of this guide. If the plan is not federally funded, it must be set to "none".)

- PrimGoals (Primary Goals, Optional)
- Shape

2. A navigation window will open and you may now navigate to the shapefile that is prepared for upload. Select it, and click **Open** (image below). This part of the process validates the shapefile to make sure the fields were set up correctly. Your shapefile does not need to have a specific projection, as it will be re-projected on-the-fly into SMART's projection. If you get an error during this process it means either 1) your computer is missing important pre-requisite files to run the SADL or 2) one or more of your shapefile fields are not set up correctly. Please contact the SMART Help Desk if you encounter an error that is not resolved with on-screen commands.



You will now see a list of Plans within your selected Shapefile. In the example below there are five management plans ready for upload. On the far left you will see Error and Warning columns. If these columns are blank, the Shapefile is ready for upload, and you may click on the green Next button.

SMART Management Plan Information from Shapefile
Please review your records for errors and warnings.

Errors	Warnings	No	Plan ID	Plan Name	Plan Category	Surveyed Acres	Plan Type	Plan Start	Plan Length	Funding	Primary Goals	Shape
		0	FSP_2017_001_SMITH	001-Smith Ranch	Forest Stewardship Plan	0	Revised	5/1/2017	10	FSP	Many	POLYGON ((-11752885.191514371 4
		1	FSP_2017_002_SMITH	001-Smith-01	Forest Stewardship Plan	0	New	8/1/2017	10	FSP	A lot	POLYGON ((-11753821.517113855 4
		2	FSP_2017_003_SMITH	001-Smith-02	Forest Stewardship Plan	0	New	8/1/2017	10	None	A few	POLYGON ((-11751612.241861971 4
		3	FSP_2017_004_SMITH	001-Smith-03	Practice Plan	4	New	8/1/2017	10	CREP	Some	POLYGON ((-11750089.561733292 4
		4	FSP_2017_005_SMITH	001-Smith-04	Practice Plan	21	New	8/1/2017	10	EQIP	A couple	POLYGON ((-11751532.87193181 45

Restart Quit Back < > Next >

If you see a red error message, it will need to be resolved before you can continue.

SMART Management Plan Information from Shapefile
Please review your records for errors and warnings.

Errors	Warnings	No	Plan ID	Plan Name	Plan Category	Surveyed Acres	Plan Type	Plan Start	Plan Length	Funding	Primary Goals	Shape
No such field: 'Funding'		0	BALDWIN_104	STEVE LEVI	Forest Stewardship Plan		NEW	5/9/2013	10		Timber Mgt.	POLYGON ((-9769101.068
No such field: 'Funding'		1	BALDWIN_108	MELDA BOYD	Forest Stewardship Plan		NEW	5/28/2013	10		AESTHETICS	POLYGON ((-9760258.078
No such field: 'Funding'		2	BALDWIN_109	DONALD MESLER	Forest Stewardship Plan		NEW	7/12/2013	10		AESTHRTICS	POLYGON ((-9760427.088

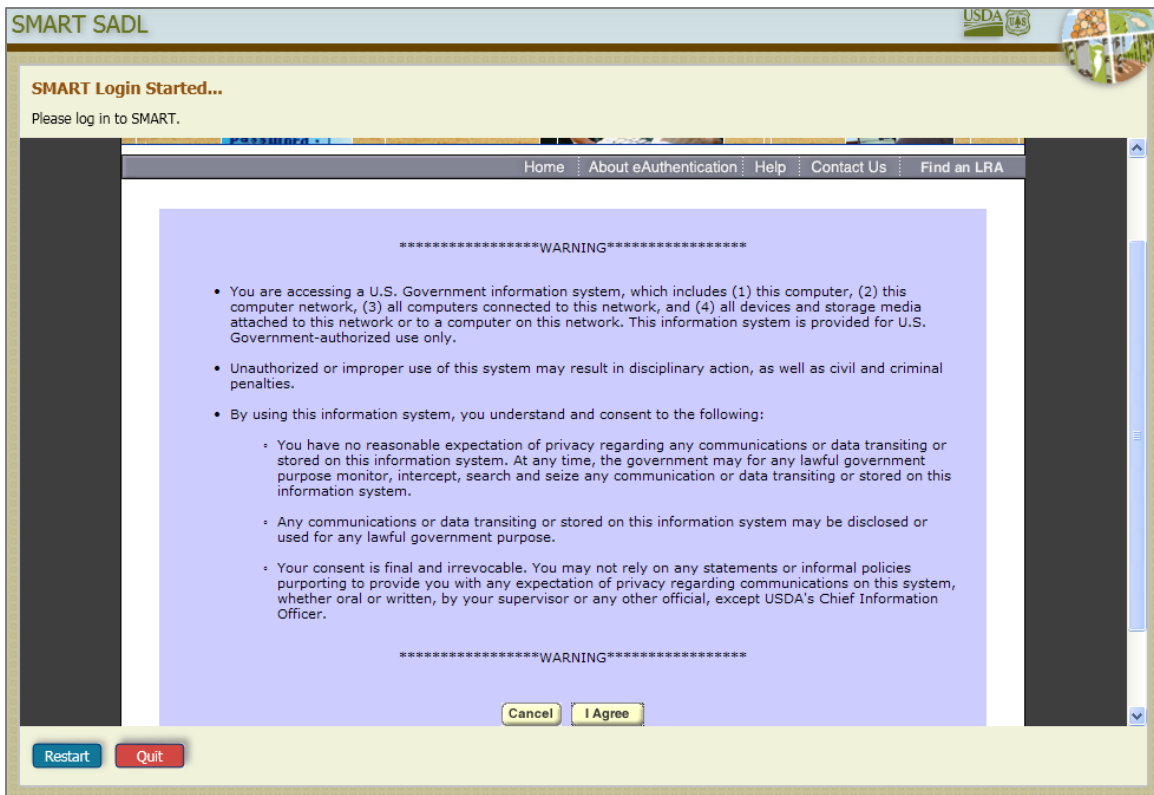
Once the shapefile is fixed, you may restart the SADL upload by clicking on the green Back button.

An orange Warning message denotes a spatial overlap or Plan ID duplication has been recognized (image below). A Warning message **will not** prevent the shapefile from being uploaded. If you are worried about plan duplications, we recommend using the Plan Management tools in the SMART State Administration module to ensure database accuracy.

SMART Management Plan Information from Shapefile
Please review your records for errors and warnings.

Errors	Warnings	No	Plan ID	Plan Name	Plan Category	Surveyed Acres	Plan Type	Plan Start	Plan Length	Funding	Primary Goals	Shape
	Plan 0 intersects with 1	0	CAP_2014_123	SADL V4 Test	CAP 106 Plan		new	1/1/2014	10	CREP	Manage	MULTIPOLYGON (((-11682307.1285
	Plan 1 intersects with 0	1	Overlap	Overlap	forest stewardship plan		new	1/1/2014	10	EQIP		POLYGON ((-11682683.502847264

- When this validation check is error-free, click **Next** to continue with your upload. Log into SMART with your eAuthentication credentials.



Once logged in, you will briefly see your SMART homepage; the SADL will then go through its final validation of the shapefile. In the far-left columns in this window you will be able to see if there are any errors or warnings detected by SMART during this step (image below).

4. If the columns are blank, click **Next** to continue. If there are red warning messages, you will need to fix any errors associated with the shapefile. If there are orange warnings, review the messages and either make necessary corrections to the file and restart the upload, or ignore them and continue with the upload.

SMART Management Plan Validation Completed.
Validation warnings were detected and are listed below!

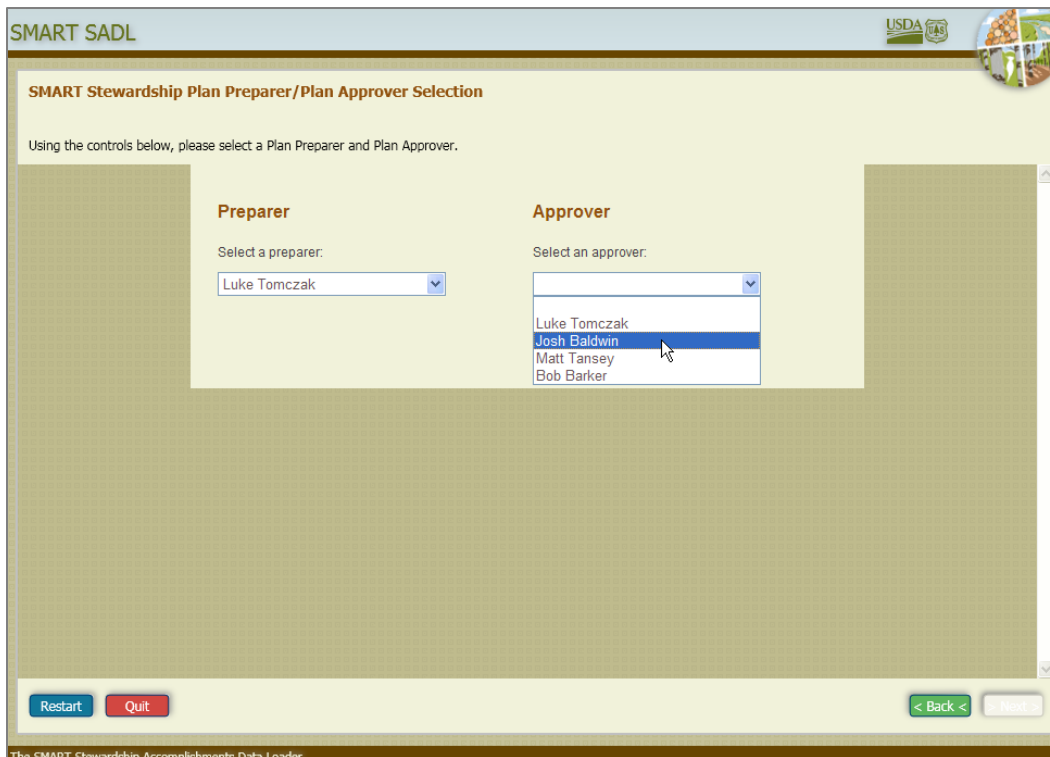
Please review the warnings and either make necessary corrections to the file or ignore these warnings and continue with the upload.

Errors	Warnings	No	Plan ID	Plan Name	Plan Category	Surv
	Shape - Plan overlaps with one or more plans in SMART (overlapping IDs: 10509,215560,219244,219247,219248,219250,219251,255069)	0	FSP_2017_001_SMITH	001-Smith Ranch	Forest Stewardship Plan	0
	Shape - Plan overlaps with one or more plans in SMART (overlapping IDs: 10509,215560,219244,219247,219248,219250,219251,255069)	1	FSP_2017_002_SMITH	001-Smith-01	Forest Stewardship Plan	0
	Shape - Plan overlaps with one or more plans in SMART (overlapping IDs: 10509,215560,219244,219247,219248,219250,219251,255069)	2	FSP_2017_003_SMITH	001-Smith-02	Forest Stewardship Plan	0
	Shape - Plan overlaps with one or more plans in SMART (overlapping IDs: 10509,215560,219244,219247,219248,219250,219251,255069)	3	FSP_2017_004_SMITH	001-Smith-03	Practice Plan	4
	Shape - Plan overlaps with one or more plans in SMART (overlapping IDs: 10509,215560,219244,219247,219248,219250,219251,255069)	4	FSP_2017_005_SMITH	001-Smith-04	Practice Plan	21

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The next step in the process will ask you to select a Plan Preparer and a Plan Approver to associate with these plans. The Plan Preparer and Approver you select will be assigned *all* plans being uploaded. A few things to keep in mind:

- The Preparer and Approver can be the same user.
- If you want to assign specific plans to specific Approvers, you will need to break the master shapefile into separate shapefiles, and perform separate SADL uploads.
- Plans uploaded with the SADL will show up in SMART as “Approved” and can be edited later by selecting the Edit button on the plan summary page.



5. Once a Plan Preparer and Plan Approver have been selected for your plans, click the **Next** button.

This will start the plan upload into SMART and the Forest Stewardship Program’s federal database. When the upload is complete you will see “SMART Stewardship Plan Upload Succeeded!” at the top of the window (image below). This page will also let you know if any warnings were detected during the upload process, and it will have the URL link to each individual plan that was uploaded. If there are Plan ID or Plan shape duplicate warnings, the plans can be managed from the SMART Duplicate Plan Management page. A SADL upload report can be downloaded by clicking on the green Report button. The file will be downloaded to the directory where your SADL shapefile is stored.

SMART Management Plan Upload Succeeded!

Upload of Plans was successful.

You may click on the link(s) here to access the Plans in SMART.

Alternatively, login to SMART via the web to review.

File used for upload: C:\Users\jcbaldwin\Desktop\SADL\SADLdata\2017\001_SMITH_5.shp.
[SMART Duplicate Plan Management](#)

Warnings	Plan ID	Plan Name	Plan Category	Web Url
PlanId - Plan ID already exists in SMART Shape - Plan overlaps with one or more plans in SMART (overlapping IDs: 10509,215560,219244,219247,219248,219250,219251,252966)	FSP_2017_001_SMITH	001-Smith Ranch	Forest Stewardship Plan	https://dev.wrk.fs.usda.gov
PlanId - Plan ID already exists in SMART Shape - Plan overlaps with one or more plans in SMART (overlapping IDs: 10509,215560,219244,219247,219248,219250,219251,252967)	FSP_2017_002_SMITH	001-Smith-01	Forest Stewardship Plan	https://dev.wrk.fs.usda.gov
PlanId - Plan ID already exists in SMART Shape - Plan overlaps with one or more plans in SMART (overlapping IDs: 10509,215560,219244,219247,219248,219250,219251,252968)	FSP_2017_003_SMITH	001-Smith-02	Forest Stewardship Plan	https://dev.wrk.fs.usda.gov
PlanId - Plan ID already exists in SMART Shape - Plan overlaps with one or more plans in SMART (overlapping IDs: 10509,215560,219244,219247,219248,219250,219251,252969)	FSP_2017_004_SMITH	001-Smith-03	Practice Plan	https://dev.wrk.fs.usda.gov
PlanId - Plan ID already exists in SMART Shape - Plan overlaps with one or more plans in SMART (overlapping IDs: 10509,215560,219244,219247,219248,219250,219251,252970)	FSP_2017_005_SMITH	001-Smith-04	Practice Plan	https://dev.wrk.fs.usda.gov

Restart Quit **Report**

*** Important tip from the Help Desk**

The data going into SMART is crucial to successfully reporting your state’s Forest Stewardship Program accomplishments. Because of this, the SMART Help Desk recommends taking quality assurance steps when performing SADL uploads. Creating a SADL data management plan prior to beginning the uploads will help ensure that all your state’s plans make it into the database. Please consider the following items while developing your data management plan:

1. Prior to upload, search the SMART database and note the number of active and approved plans. After every upload, spot check the SMART database to ensure the correct number of plans made it into the database. You may want to keep a spreadsheet of how many plans your state intends to upload and check the total number of plans in your state post-upload.
2. During the validation stages, pay special attention to any errors that show up in the SADL interface. The error messages should point you to what kinds of issues your shapefiles have. We recommend running the check geometry tool in ArcGIS before uploads, but this does not always catch certain kinds of geometry errors. The Oracle database where SMART data are stored enforces stronger geometry rules than those of ArcGIS, so you may have to perform additional shapefile clean-up before SMART allows it in the database.
3. Once uploads are complete, we recommend using the duplicate management tools available in the State Administration module to ensure there are no duplicate plans in the database.

Shapefile Specifications

The SADL will use data contained in the following fields. The data in the fields must meet the requirements. Please note:

- Field names are **not** case sensitive.
- There is a limit of 250 records (Plans) per shapefile

Name	Description	Type	Optional/Required	Notes
PlanID	Plan ID as defined by state organization	String/Text	Required	40 characters or less
PlanName	Plan Name	String/Text	Required	40 characters or less
PlanType	Indicates if Plan is New or Revised	String/Text	Required	Must be one of the following, case insensitive: New Revised
PlanCat	Indicated Management Plan Category	String/Text	Optional	If this field is <i>not</i> provided in the shapefile, the value will default to "Forest Stewardship Plan". So while the field is not "required" to be included in the file, a value is required if the field is included. If this field is included in the shapefile, it must be one of the following, case insensitive: Conservation Stewardship Plan Forest Stewardship Plan Forest Management Plan Practice Plan Harvest Plan Planting and Regeneration Plan CAP 106 Plan Rehabilitation Plan Wildfire Mitigation Plan
PlanStart	Date the Plan begins	Date	Required	Data type may be String/Text but must be formatted as yyyy/mm/dd

Name	Description	Type	Optional/Required	Notes
PlanLength	Duration, in years, that the Plan will be active	Integer/Long/Short	Required	Alternative data type 1: Float/Double/Real: The value will be rounded down. Alternative data type 2: String/Text: Must be formatted as a number. Any decimal portion will be rounded down.
Funding	Indicates if Plan writing is funded by EQIP	String/Text	Required	Must be one of the following, case insensitive: Y T YES TRUE N F NO FALSE
PrimGoals	Primary Goals and Objectives	String/Text	Optional	254 characters or less, limited by shapefile format
Shape	Plan boundary	Geometry	Required	Must contain a polygon or multi-polygon with 10,000 or fewer points/vertices. If the shape is invalid, SMART will attempt to repair it; this may result in a somewhat different shape than provided.

Plan Categories

These are the current Plan category types available in SMART. Please use this table to determine the most appropriate Plan category for any Plans going into the SMART database.

With respect to SADL uploads, please keep in mind the following:

If the PlanCat field is **not** provided in the shapefile, the value will default to "Forest Stewardship Plan". So while the field is not "required" to be included in the file, a value is required if the field is included.

If PlanCat **is** included in the shapefile, the field must be populated with one of the Plan Category terms provided in the Shapefile Spec sheet above.

Long Name	Short Name	When to Select this Plan Type
Forest Stewardship Plan	Stewardship	Plans that meet National Forest Stewardship Program guidelines
Forest Management Plan	Management	Plans that meet state specific guidelines like open space, tax savings programs, or other state priorities
Practice Plan	Practice Plan	Plans that address focused activities like a stand prescription or cost shared activities
CAP 106 Plan	CAP 106	Plans that meet NRCS Requirements for CAP 106
Conservation Stewardship Plan	CSP	NRCS Conservation Stewardship Program Plans
Rehabilitation Plan	Rehabilitation	Plans that address corrective action or rehabilitation treatments
Harvest Plan	Harvest	Plans that address harvesting activities, road layout and construction, bridges, and culverts
Wildfire Mitigation Plan	Fire Mitigation	Plans that address fuels reduction, wildfire mitigation, and defensible space

Long Name	Short Name	When to Select this Plan Type
Planting and Regeneration Plan	Planting	Plans that address planting, replanting, afforestation, reforestation, and windbreaks