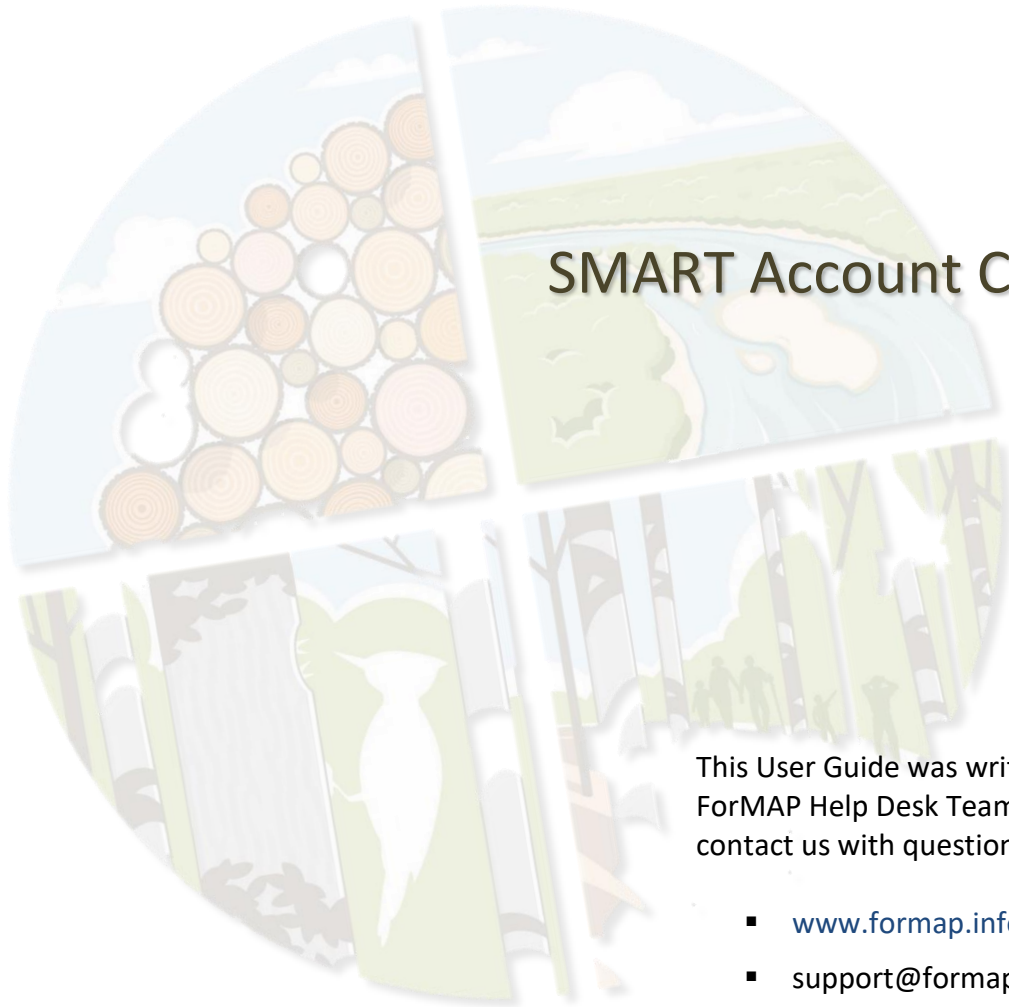# SMART User Guide

Stewardship Mapping and Reporting Tool

SMART Account Creation

This User Guide was written by the ForMAP Help Desk Team. Please contact us with questions:

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

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eAuthentication & SMART User Accounts

In order to access SMART, whether browsing or editing data, you must have an active USDA eAuthentication account.

What is eAuthentication?

eAuthentication is the USDA's web-based credentialing system that allows users to access USDA web applications and services via the internet using one user name and password.

eAuthentication accounts are available for both USDA employees and non-staff customers, contractors, and state employees. These accounts enable users to perform functions such as submitting forms electronically, completing surveys online, checking the status of a USDA account, and logging on to official web applications (such as SMART).

Do I Have an eAuthentication Account?

If you are a federal employee currently working for the Forest Service you should already have an eAuthentication account. If you cannot remember obtaining an account or you cannot remember your password, click *here* for useful links at the eAuthentication website.

All others working outside the federal government will need to obtain an eAuthentication account before creating a SMART account.

Request an eAuthentication Account

1. Direst your web browser to the eAuthentication home page – *https://www.eauth.usda.gov/home*.

2. Click on the Create Account tab

3. Select your user type (Customer, in most cases)

4. Click Continue

5. Enter your work email address, and click Submit

6. Open the "eAuth" email in your inbox and click on the Continue Registration button

7. Complete the Customer Account Registration form

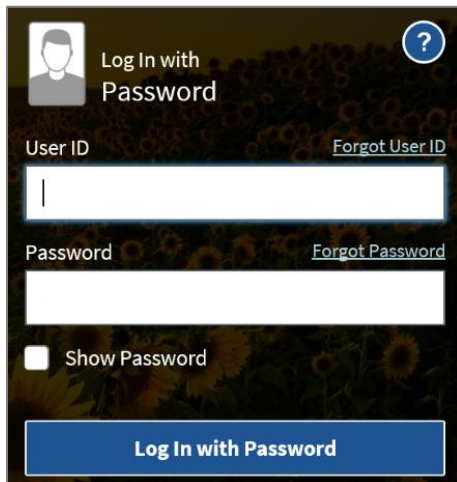8. Click on the Submit button on the bottom of the page

Creating Your Account in SMART

SMART Access

In order to gain access to SMART, you will need to use your eAuthentication (eAuth) credentials to log into the web application. If you are a federal employee and already have an eAuth account, you will need to use your LincPass or existing eAuth User ID and Password. If you are a state employee or contractor you will need to obtain a federal eAuth account (section above) before requesting a SMART account.

Request a SMART account:

1. Direct your web browser to ***https://apps.fs.usda.gov/formap/***
2. Enter your eAuthentication credentials in the login section

You must log in with your eAuth credentials each time you use SMART.

If you have forgotten your User ID or Password, follow the links provided above the entry fields.

When a successful username and password are entered, you will be logged into SMART and your home screen will reflect your assigned level of access, or user roles – which identify you throughout the session. These roles are selected when you create your SMART account.

The **first** time you sign into SMART you will be prompted to create a new user account. The screen below will appear.

Create a New Account

*Indicates a required field

User Details

*First Name

*Last Name

*Address

Address Line 2

*City

*State

*Zip

*Phone Number

*Email Address

*Organization

*Organizational Unit

*Employee Type

○ State Employee   ○ Federal Employee

○ Private Consultant   ○ Other

3. Fill in all required information in the User Details section (fields with a red asterisk next to heading). After your account is approved you will be able to change or update the information on this page, except for Name and Organization. Please ensure that all fields are correct and accurate.

4. Choose your Employee Type. Note: if you choose Private Consultant, you will be limited to seeing only management plans of which you are listed as the preparer.

5. Choose your desired role(s) carefully (images below). See pages 7-9 for detailed descriptions of each role. If you have any questions about these roles, please contact your SMART State Administrator or the SMART Help Desk before continuing at *https://www.formap.info/contact-helpdesk/* or 303-275-5341.

*Roles

SMART

☐ **Project Preparer**
Create, edit, submit, delete and reassign Projects that you prepare. You also have Browser rights.

☐ **Project Approver**
View, approve, delete and reassign Projects that you are assigned to you. If you are also a Project Preparer you can approve your own Projects. You also have Browser rights.

☐ **Management Plan Preparer**
Create, edit, submit, delete, set inactive, revise and reassign Management Plans, including Stewardship Plans, that you prepare. You can also revise other Management Plans in your state. You can download Management Plan Reports for your and all Approved Plans. You also have Browser rights.

☐ **Management Plan Approver**
View, approve, delete and reassign Management Plans, including Stewardship Plans, that are assigned to you. Download Management Plan Reports for your and all Approved Plans. If you are assigned the role of Management Plan Preparer as well as Management Plan Approver, you have the capability to approve your own Management Plans. You also have Browser rights.

☐ **Landscape Preparer**
Create, edit, activate, delete and reassign Landscape Plans that you prepare. You also have Browser rights.

ForHealth

☐ **Project Editor**
Forest Health Projects are funded by the USFS State and Private Forestry program. Forest Health Project Editors may propose and submit projects, as well as update Project Accomplishments and Treatment maps for their jurisdiction. Project Editors from outside the USFS will be limited to accessing Projects affiliated to their Organization, as well as by USFS Region. USFS Project Editors may add Projects for any Organization.

☐ **Project Approver**
Forest Health Project Approvers will also automatically have the same rights as Project Editors. In addition, they can Add Funding to and Approve/Reject Projects. Only USFS employees are eligible to register for the Project Approver role.

LaSR

☐ **Project Preparer**
Landscape-scale Restoration projects are competitively funded projects. Users may create LaSR Projects (USFS users only). Users may edit LaSR Projects, where state users are limited to editing Projects affiliated to their organization. Users may not delete LaSR Projects (limited to National Administrator role).
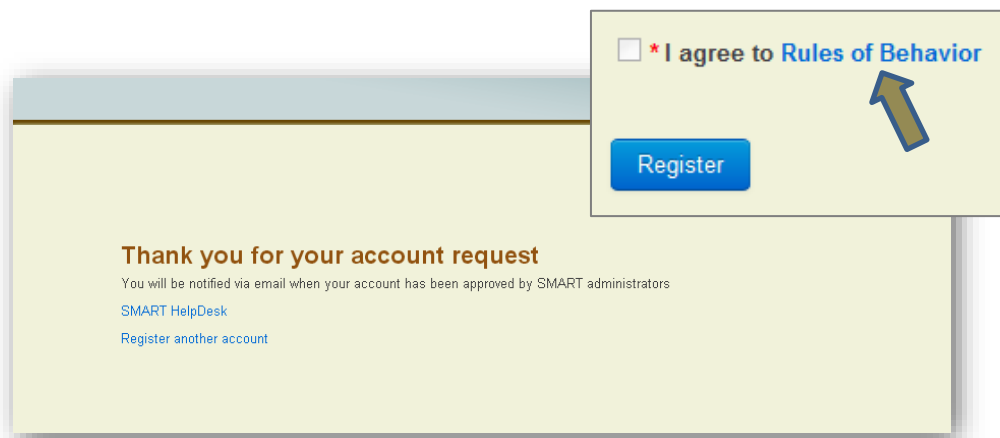
System

☐ **Browser**
As a Browser you can view Active Landscape Plans, Approved Management Plans, and Approved Projects, and Published Landscape-Scale Restoration (LaSR) Projects.

☐ **State Administrator**
Manage user accounts and data within your state. Approve/reject new account requests, manage user roles, manage approver / preparer assignments, update user information details, deactivate accounts, reactivate accounts, and review login activity. View, delete, reassign management plans and projects, export a state-wide database, and export a listing of the Stewardship Plans flagged for implementation monitoring. You also have Browser rights. You may also view all LaSR Projects that your state is the Lead Agency for.

☐ **National Administrator**
Manage all user accounts and data. You also have Browser rights.

After entering in user details and selecting your role(s):

6. Click on the Rules of Behavior link; once you agree to the rules of behavior, a check mark will be automatically placed in the box.

7. To request a SMART account, click **Register.**

☐ *I agree to Rules of Behavior

Register

Thank you for your account request
You will be notified via email when your account has been approved by SMART administrators
SMART HelpDesk
Register another account

Once you have registered, the SMART National Administrators and your State Administrator (if applicable) will be notified of your request. They will either accept or deny your account request, and you will get an email from "SMART-FS" letting you know your account status. When your account has been approved, you will need to log into SMART with your eAuth login credentials, whereupon you will be directed to your SMART Home Page (image below).
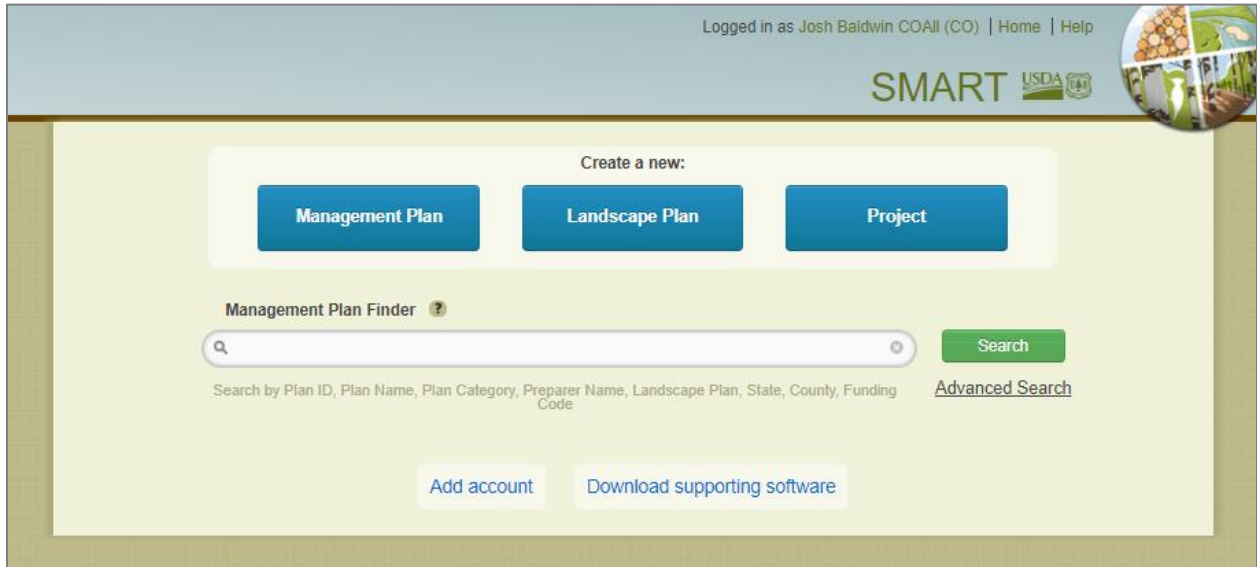
You are now ready to use SMART --- welcome aboard!

User Roles

There are multiple roles (access levels) available to SMART users. You can select one or more roles based on your job responsibilities within your organization. Each of these roles is detailed below.

Project Preparer

Project Preparers are state forestry agency personnel or contractors who will be entering projects for the state. The Projects module in SMART was created in order to serve the needs of state agencies that want to use SMART for storing information on forestry-related projects. Examples of projects include a landowner visit, a community workshop, and a fieldwork sampling scheme. They also have Browser rights.

Project Approver

Project Approvers are state forestry agency representatives who can approve projects. They also have Browser rights.

Management Plan Preparers

Plan preparers are forestry professionals who work directly with non-industrial private forest landowners to prepare management plans. Depending on how the state delivers the Forest Stewardship Program, Plan Preparers can be state forestry agency employees, state natural resource professionals, or consultant foresters. Plan Preparers have the ability to create, edit, submit, delete, set inactive, revise, and reassign Management Plans for which they are listed as the Preparer. They can download Management Plan Summary Reports for their plans and all Approved Plans. They also have Browser rights.

Management Plan Approvers

Plan Approvers are state forestry agency personnel who have the authority to approve Management Plans prepared by state employees or consultant foresters. They have the ability to view, approve, delete, and reassign Management Plans that are assigned to them. They can download Management Plan Summary Reports for their plans and all Approved Plans. If they are a Plan Preparer as well as a Plan Approver, they have the capability to approve their own Management Plans. They also have Browser rights.

Landscape Preparer

Landscape Preparers are state forestry agency personnel or contractors who will be entering in landscape plans for the state. The Landscape module in SMART was created to give states the opportunity to store non-Forest Stewardship landscape plan information in SMART. Examples of landscape plans include a wildfire risk landscape plan for a WUI subdivision or a multi-county invasive plant mitigation plan. This module is different from the Landscape Scale Restoration (LaSR) Projects module; see below for more details on LaSR projects. They also have Browser rights.

LaSR Project Preparer

The LaSR module was developed for U.S. Forest Service staff, state forestry personnel, and non-governmental organizations to create, edit, and report on State and Private Forestry Landscape Scale Restoration competitive grants. Older "Redesign" grants have been transferred to LaSR and can be edited by LaSR Project Preparers. Non-state project partners may sign up for this role. Due to a database constraint, they will need to choose "State Employee" – even if not technically employed by the state – as their employee type.

ForHealth Project Editor

Forest Health Projects are funded by the U.S. Forest Service State and Private Forestry program. Forest Health Project Editors may propose and submit projects, as well as update Project Accomplishments and Treatment maps for their jurisdiction. Project Editors from outside the U.S. Forest Service will be limited to accessing Projects affiliated to their Organization, as well as by Forest Service Region. U.S. Forest Service Project Editors may add Projects for any Organization.

ForHealth Project Approver

Forest Health Project Approvers have the same rights as Project Editors. In addition, they can add funding to and approve/reject Projects. Only U.S. Forest Service employees are eligible to register for the Project Approver role.

Browsers

These users are U.S. Forest Service staff and State Forestry Agency personnel and who do not need to create or manage plans in SMART, but have a legitimate business reason for viewing the database. This includes national State and Private Forestry or Cooperative Forestry Program staff, regional U.S. Forest Service Forest Stewardship Program Managers, and State

Forestry Agency personnel. They have the ability to query summary information from across the nation, and to map and quantify those results. Browsers can query and view only approved Management Plans, active Landscape Plans, approved Projects, and published Landscape Scale Restoration (LaSR) Projects.

State Administrators

This is the most robust role in SMART. State Administrators are State Forestry Agency personnel – primarily Forest Stewardship Coordinators or GIS specialists – who approve management plans, review summary plan information for their states, and use the results to track accomplishments and strategically deliver the Forest Stewardship Program. They manage user accounts and data within their state. Responsibilities include: approve/reject new account requests; manage user roles; manage Plan Approver/Preparer assignments; update user information details; deactivate/reactivate accounts; view, delete, and reassign management plans; export their state geodatabase; download their state's plan monitoring report; create and manage funding codes; and enter landowner accomplishments. They also have Browser rights.

National Administrator

National Administrators are the authorizing individuals who grant permission and access to prospective SMART users. Their primary duties are to manage user accounts and data within SMART. This role is reserved for the Product Owner and a select group of surrogates. They also have Browser rights.

SMART User Roles

The table below is a general overview of some of the major SMART functions, and the user roles that have the ability to perform each function. Roles are not limited to this list of functions; many of the roles will have additional functions within SMART.

SMART Function	National Administrator	Browser	State Administrator	Plan Approver	Plan Preparer
Manage users.	X		X		
View all approved plans.	X	X	X	X	X
Create or Edit plans.					X
Submit a plan for approval.					X
Approve plans.			X	X	
Delete plans.			X	X	X
Query visible plans.	X	X	X	X	X
Create reports of query results for approved plans.	X	X	X	X	X
Upload outside plans to SMART using the SADL			X		
Export Statewide Database			X		

You can have multiple roles. Once you log into SMART, you will be presented with a home screen that reflects your user role. Depending on your access level, you will have the ability to perform different tasks.

My Account

The **My Account** screen is used to manage the contact information that is associated with your SMART account. Check and update this information after your account is initially set up. If your information changes (e.g. email address, phone number) you can update it here. Note: once your account has been created in the database, you cannot change your User Name or Organization.

Updating Your Account Information

1. To access this function, click your name at the top of the screen on any page in SMART.
2. The User Details, Roles, and Approver/Preparer sections will be shown. Review all fields and update as needed.

3. Click the **Save** button when you are finished.

You may also review the roles that have been assigned to you by your state administrator. Scroll down to see your roles and any Plan Approvers or Plan Preparers associated with your account. These Preparers and Approvers will be assigned and managed by your state administrator (images below).