SMART User Guide

Stewardship Mapping and Reporting Tool (ForMAP Version 7)

A complete guide to creating and managing Forest Stewardship Plans using the USDA Forest service SMART database

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

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About SMART

Introduction

SMART (Stewardship Mapping and Reporting Tool), a web-based data entry tool, was designed and adopted for use by the U.S. Forest Service Forest Stewardship Program to spatially track Forest Stewardship Plan accomplishments with respect to priority landscape areas defined through the Spatial Analysis Project (SAP). It facilitates Forest Management Plan development, maintenance of a central spatial and attributes database, and one-time reporting through an online web application.

SMART enables the Forest Service to 1) collect and manage spatial program accomplishment data produced by state forest agency and other program delivery partners, and 2) relate these accomplishments to underlying resource priority areas and issues such as those identified in State Forest Action Plans.

The SMART application is designed to be used and accessed by field foresters, state planners and administrators, and federal coordinators.

Key Features

- Always on, web-based Application
- User account registration & management
- Administrative functions (e.g., state funding code management; implementation monitoring flags)
- Dashboard quick links (e.g., Recently Viewed Plans, Plans Pending Approval)
- Management plan creation – New & Revised plans
- Upload Plans in bulk to SMART via the Stewardship Accomplishments Data Loader (SADL)
- Streamlined activity codes
- Forest Management Schedule Interactive Timeline
- Plan record management (e.g., submit, approve, reassign, delete, set inactive, etc.)
- Plan Report output (Microsoft Word format), including signature page, maps, and tables
- Project-level accomplishment creation & management
- Landscape Plan creation

- Landscape Plan record management
- Bing & ESRI base maps (aerial photo, topographic maps, street maps)
- Ability to add external GIS map services layers (ArcGIS REST or WMS)
- Digitizing, vertex editing & other easy-to-use GIS shape editing – including LARGE map space (property, stands, lines, points, project shapes, landscape boundary)
- Upload GIS data from shapefile via ShapeUp desktop tool and ShapeUp ArcGIS add-in (single or multi-part shape upload into property, stands, lines, points, project shapes, landscape boundary)
- Shapefile download (download a Stewardship Plan's associated GIS features from SMART)
- Data export (full statewide geodatabase)
- Simple & advanced query for Plans & Projects (keyword, spatial, other filters)
- Report output (Summary Reports; query results map and data; implementation and monitoring sample sets)
- WebDET data migration (one time only, for states with legacy WebDET data prior to SMART rollout)
- Stewardship Accomplishments Data Loader (SADL) tool for State Administrators, which facilitates upload of shapefiles containing Active Plans with minimum required data; used for accomplishment reporting
- Stores data (spatial and attribute) in a central database to facilitate one-time reporting and meeting local, state, regional, and national program and reporting requirements

Benefits

As a web-enabled application:

- It is not necessary to have ArcGIS installed on your computer
- New functionality can be made available immediately
- Eliminates redundant or overlapping data formerly housed in separate state databases
- Year-end reporting is more efficient from one central geodatabase
- Eliminates local server down times
- Special links will automatically sync tabular data with spatial data
- Internet-based access helps to satisfy e-Gov initiatives
- Allows states to use their current reporting system *and* report through SMART using the Stewardship Accomplishments Data Loader (SADL)

- Employs high levels of security

As a consolidated geodatabase:

- Database support and maintenance activities performed more easily
- Redundancy and disaster recovery built into the server
- Dedicated 24/7/365 support through the USDA's Virtual Data Center
- Unlimited data storage for warehousing and managing management plans and spatial data
- Employs high levels of security

Hardware and Software Minimum Requirements

ForMAP	
Browser	• Internet Explorer 8 (we recommend 10+ for full functionality • Firefox 4.0+ • Chrome 12.0+ • Edge 25.0+
Internet Connection	High speed internet connection.
*There is no logout button *Must close and reopen Browser or clear cookies to log in with different eAuth/Login.gov credentials	

eAuthentication, Login.gov, and SMART User Accounts

To log into SMART, whether browsing or editing data, you must have a valid USDA eAuthentication or Login.gov account. Each time logging into SMART, you will enter your USDA eAuthentication or login.gov credentials.

eAuthentication and USDA Users

The SMART application participates in USDA's eAuthentication system. eAuthentication is the USDA's single-sign-on system that allows users to access USDA web applications and services via the internet using a username and password.

eAuthentication accounts are available for USDA employees and used to be available for non-USDA "Customers" – e.g., state employees, contractors, institution and non-profit staff. These accounts allow 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.

If you are a federal employee currently working for the USDA, you should already have an eAuthentication account and will use this to log onto SMART (see the section *Accessing SMART* below). If you don't remember obtaining an account or need to reset your password, click here: ***https://www.eauth.usda.gov/eauth/b/usda/home***

Login.gov and "Customer" Users

In 2023, USDA eAuthentication partnered with Login.gov to provide Public Customers (any Non-USDA person) multi-Factor authentication (MFA) login options for improved access to USDA websites and applications.

As of August 2024, Login.gov is the only way for non-USDA users to access the Forest Mapping and Accomplishments Portal (ForMAP) – where the SMART application is housed.

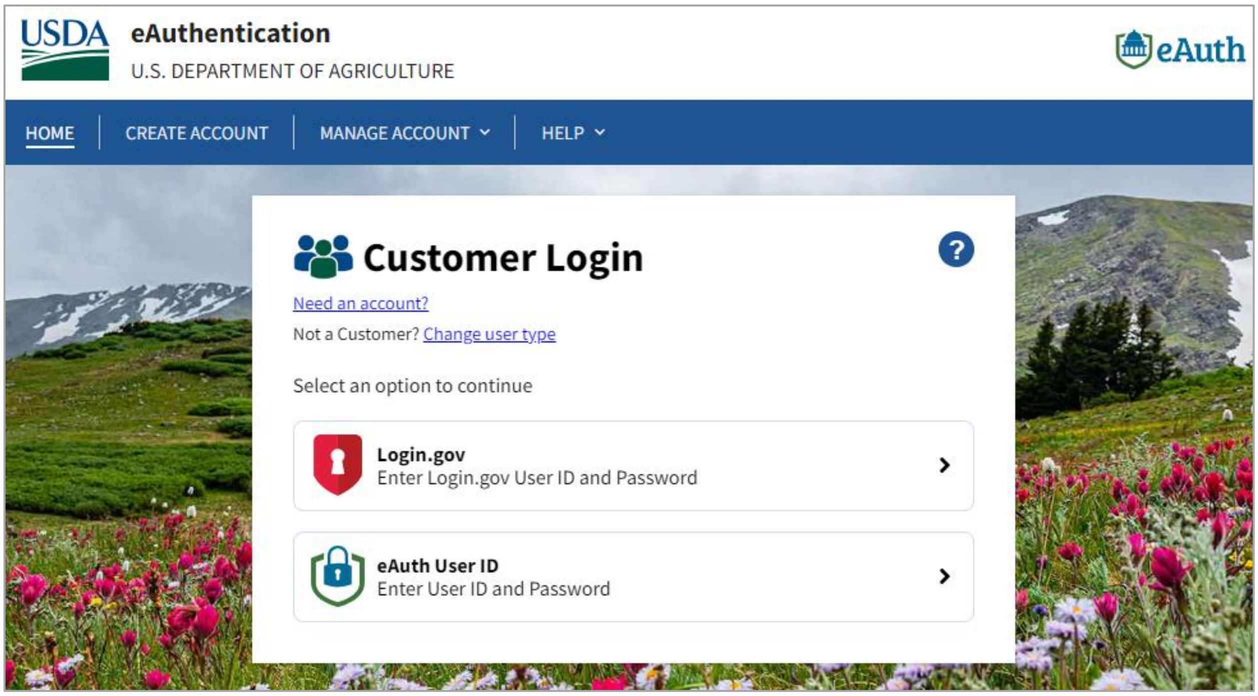
If you're new to ForMAP and USDA websites, you will need to create a Login.gov account here: ***Login.gov.*** If you currently use eAuthentication to log into ForMAP (and are not a USDA employee), you will need to create a Login.gov account and link it to your eAuthentication account, which is then linked to ForMAP.

If you need more information, please visit ***Login.gov***.

Accessing SMART

After creating a Login.gov account (or eAuthentication in the case of USDA employees), the next step is to create a SMART account.

1. Open your web browser and navigate to SMART – ***https://apps.fs.usda.gov/formap***.
2. Select the appropriate user type from the eAuthentication login page. Note: state users are considered “Customers”.
3. If you have a Login.gov account, select the Login.gov button.
4. If you have an eAuthentication account, select the eAuth User ID button.



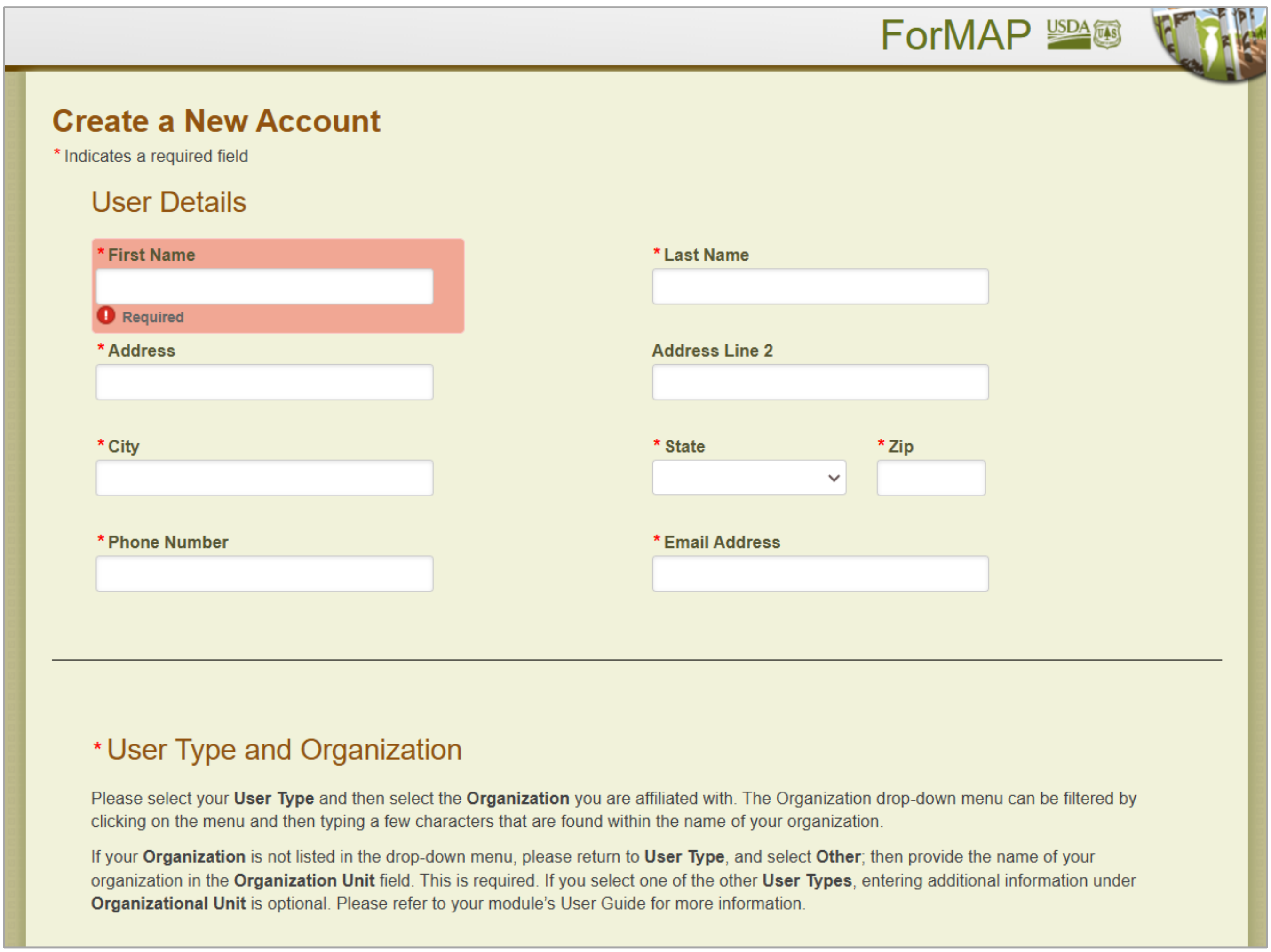
5. Follow the onscreen prompts to log into your respective credentialing service. Each time logging into SMART, you will enter your USDA eAuthentication or Login.gov credentials.

When a successful User ID and password are entered, you will be logged into the Forest Mapping and Accomplishments Portal (ForMAP), where you will then be able to create your SMART account.

Creating Your Account in SMART

Requesting SMART Access

Anyone accessing SMART is required to obtain authorization through the Forest Mapping and Accomplishment Portal (ForMAP) web application. The *first* time you sign into SMART you will be prompted to create a new ForMAP user account. Note: f you already have a SMART account and reach this page, please contact the Help Desk (contact info on cover page of this guide).



1. Fill in all required information in the User Details section (fields with a red asterisk next to heading.

2. Select your User Type and Organization. Note: the Tribal, Non-Governmental / Higher Education, and Other user types are primarily for Landscape Scale Restoration Projects users.
3. Select pertinent roles. SMART is part of a suite of USDA Forest Service reporting applications, so please select your role(s) carefully. See below for detailed descriptions of each role. If you have any questions about these roles, contact the ForMAP Help Desk before continuing at *sm.fs.formap@usda.gov* or *support@formap.info* 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

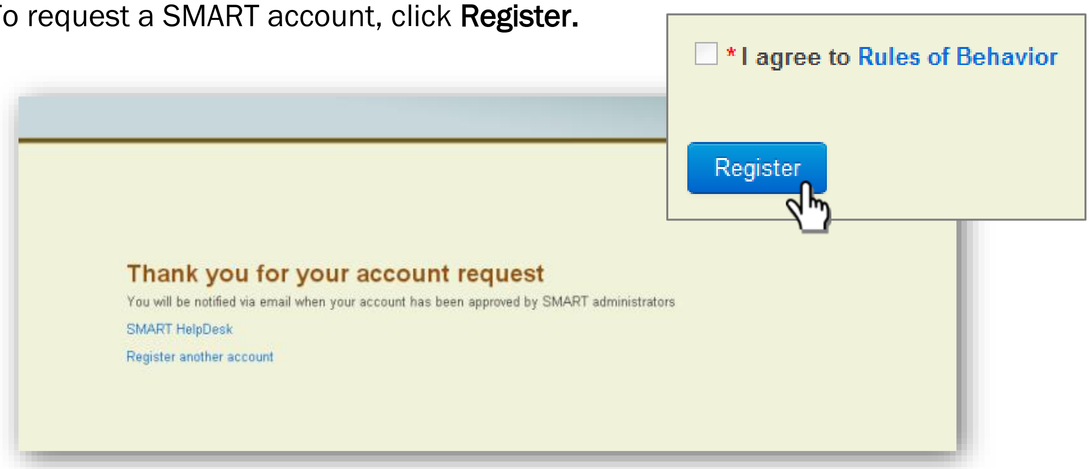
☐ **Browser**
As a Browser you can view Active Landscape Plans, Approved Management Plans, and Approved Projects, and Published Landscape-Scale Restoration (LaSR) Projects.

☐ **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.

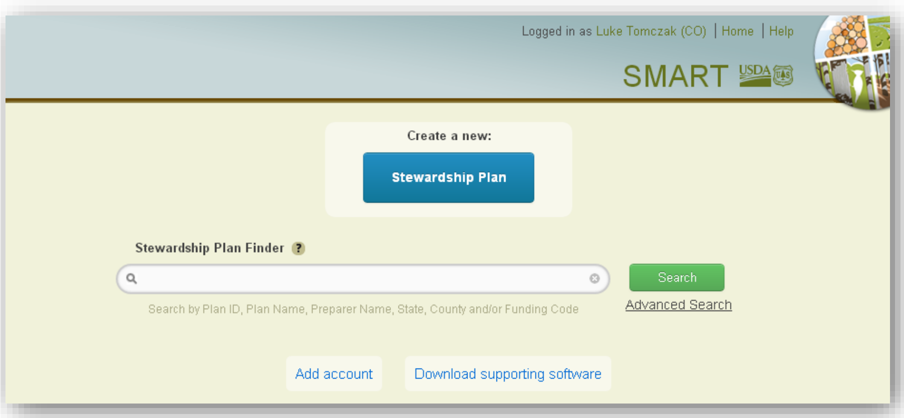
☐ **National Administrator**
Manage all user accounts and data. You also have Browser rights.

4. Below the User Roles section, 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.[1]

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



Once you have registered, the SMART National Administrators and your State Administrator (if applicable) will be notified of your request, and act on the account request as quickly as possible. You will get an automated email from *sm.fs.formap@usda.gov* notifying you about the registration status. When your account has been approved, you will need to log into SMART with your eAuthentication credentials, whereupon you will be directed to your SMART Home Page (image below). If your account is rejected, a National Administrator will contact you directly with more information.



You are now ready to use SMART --- Welcome aboard!

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[1] If you are using Internet Explorer and not able to get past this page, please use a different web browser to complete your SMART account creation.

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 Preparers

Project Preparers are state forestry agency personnel or contractors who will be entering in 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 (Field Foresters)

Plan preparers are professionals who work directly with non-industrial private forest landowners to prepare FSPs. In some states, the FSP is delivered by state forestry agency employees or other state natural resource professionals; in others, it is delivered exclusively by consultant foresters and non-state natural resource professionals. Some states employ a combination of the two, utilizing both state employees and consultant foresters. Plan Preparers can create, edit, submit, delete, set inactive, revise and reassign Management Plans that they prepare. They can revise non-Forest Stewardship Management Plans in your state. They can download Reports for their Management Plans as well as all Approved Plans in the database. They also have Browser rights.

If your Employee Type is Private Consultant, you will be limited to viewing and editing only plans for which are listed as the Plan Preparer.

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 can view, approve, delete, and reassign Management Plans that are assigned to them. Download Management Plan Reports for their 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.

ForHealth Project Editor

The Forest Health projects accomplishments module, ForHealth, replaces the FAD (Forest Health Protection Accomplishments Database) reporting system. ForHealth Project Editors work in state forestry agencies or are from USFS and other federal organizations. ForHealth Editors are primarily responsible for creating and submitting projects, which then get approved by Project Approvers.

ForHealth Project Approver

ForHealth Approvers have all the functionality of ForHealth Editors. Additionally, they are responsible for approving, rejecting, and adding funding information to incoming Forest Health projects.

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, and a multi-county invasive plant mitigation plan. This module is different from the Landscape Scale Restoration (LaSR) Projects; see below for more details on LaSR projects. They also have Browser rights.

LaSR Project Creator

The LaSR module was developed for U.S. Forest Service staff and partners to create, edit, and report on Landscape Scale Restoration competitive grants. This role is for USDA-FS users. Please see the LaSR User Guide for more information.

LaSR Project Editor

The LaSR module was developed for U.S. Forest Service staff and partners to create, edit, and report on Landscape Scale Restoration competitive grants. This role is for non-USDA partners, such as state forestry staff and grantees. Please see the LaSR User Guide for more information

Browsers

These SMART users include: state forestry agency personnel, national USDA Forest Service staff (State and Private Forestry, Cooperative Forestry Program), regional USDA Forest Service staff – including program managers, database specialists, and GIS specialists who review management plans and use the results to track accomplishments and to strategically deliver the Forest Stewardship Program. These users can query the summary information from across the nation, create maps, download summary reports. Browsers have access to view *Active* Landscape Plans, *Approved* Management Plans, and *Approved* Projects.

State Administrators

These SMART users are primarily State Forestry Agency personnel who approve Management Plans, review the summary information for the plans in their states, and use the results to track accomplishments and strategically deliver the Forest Stewardship Program. State Administrators manage user accounts and data within their state. They can approve/reject new account requests, manage user roles, manage approver/preparer assignments, update user information details, deactivate accounts, reactivate accounts, and review login activity. They can view, delete, reassign, export a state-wide database, and export a listing of the Management Plans flagged for implementation monitoring. They also have Browser rights.

National Administrator

National Administrators are the authorizing individuals who grant permission and access to prospective SMART users. They also manage user accounts and data within SMART.

SMART User Roles

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

SMART Function	National Administrator	Browser	State Administrator	Plan Approver	Plan Preparer	Plan Preparer (Consultant)
Manage users	X		X			
View all approved plans	X	X	X	X	X	
Create or Edit plans					X	X
Submit a plan for approval					X	X
Approve plans			X	X		
Delete plans (when Plan Preparer)			X	X	X	X
Query visible plans	X	X	X	X	X	X

SMART Function	National Administrator	Browser	State Administrator	Plan Approver	Plan Preparer	Plan Preparer (Consultant)
Create reports of query results for all approved plans	X	X	X	X	X	
Upload outside plans to SMART using the SADL			X			
Export Statewide Database			X			

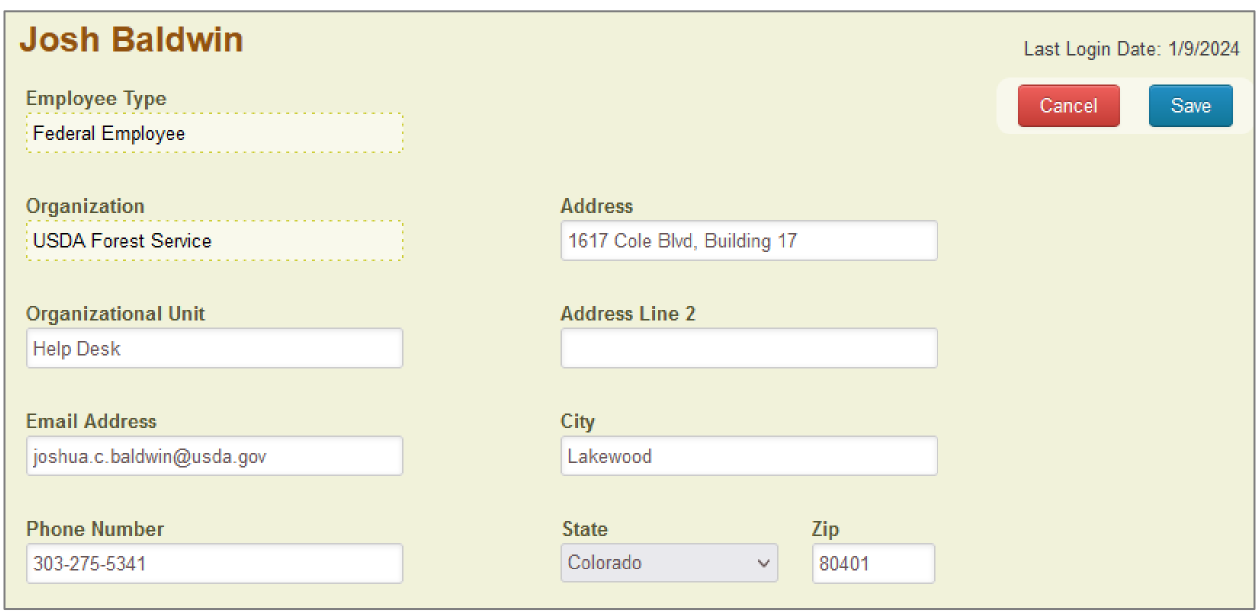
You can have multiple roles. Once logged into SMART, you will be presented with a home screen that reflects your user role. Depending on your access level, you will have the ability to perform different tasks.

My Account

The **My Account** screen is used to manage the contact information associated with your SMART account. Check and update this information after your account is initially set up. If your personal information changes, you can update it here.

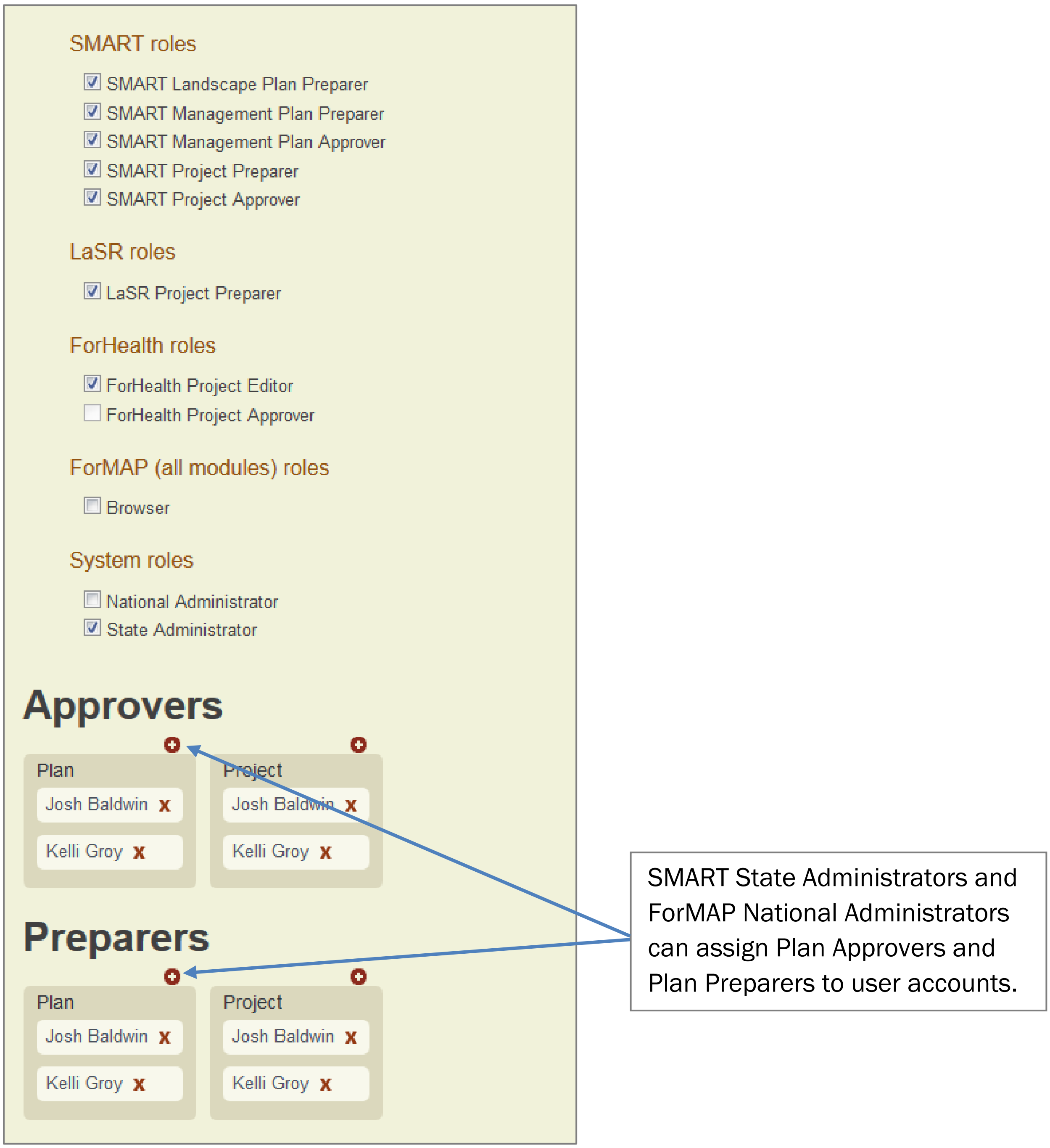
Updating Your Account Information

1. To access this function, click your name at the top of the screen when you are logged into SMART (shown above).
2. The Contact Information table will be displayed. Review all fields and change any incorrect items. Fill out empty fields 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 the **Assigned Roles** section. Roles and any approvers or preparers associated with your account are listed here. These plan preparers and plan approvers will be assigned and managed by your state administrator (image below).



Management Plans

A Management Plan is a comprehensive plan for managing forest resources on a particular property. Plans are intended to serve as an inventory of present conditions, a prescription for desirable improvements, a record for implemented actions, and a source of statistics for evaluating forestry program effectiveness.

Management plans should include: summarized information about the covered property; details on property location and ownership (subject to some restrictions); a description of existing conditions; map elements depicting major components of the property and its forests; and records for all activities planned, in progress, or completed.

SMART was designed and developed by the U.S. Forest Service's State and Private Forestry Forest Stewardship Program in conjunction with state forestry agencies. It is used primarily as a Forest Stewardship plan creation, tracking, and reporting tool. The web application allows various types of management plans to be created in SMART and stored in its database. Currently, states are under no obligation to enter their non-Forest Stewardship "Other" management plans into SMART. However, this reporting condition may change in the future, so please check with your state coordinator or USFS Forest Stewardship program manager if questions arise.

Suggested Workflow

To enter or update a Management Plan (MP), work through the following steps:

Search SMART to find out if the property is already covered by a MP. (Page 17)

If **NO**, follow steps to create a new Management Plan. (Page 20)

If **YES**, select the existing plan and revise accordingly. (Diagram below)

Revise Management Plan Information

- **General Plan Details** (page 20)
- **Details** (page 26)
- **Property Boundary** (page 28)
- **Stands** (page 32)
- **Lines & Points** (pages 47-49)

Click on the Plan Name to navigate to the **Plan Summary Page** (page 50)

Submit your final version for approval (page 52).

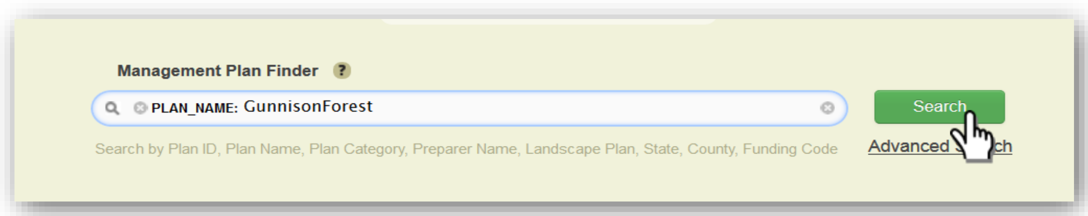
Searching for Management Plans

All roles may query and view active Management Plans. This should be the first step taken before entering a new plan and will ensure that no duplicate records are in the database.

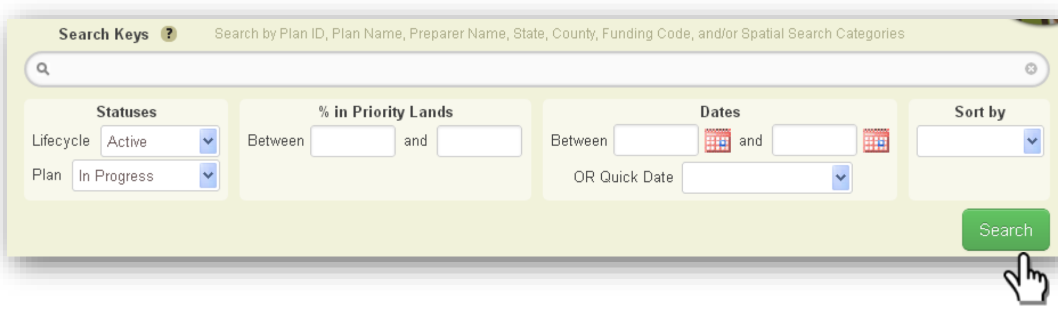
The basic search capabilities allow you to find and view plans of which you are listed as the Plan Preparer (either approved or in progress); all SMART users can find and view active plans which are approved. The search string operates on a "contains string" basis and will locate plans that contain the specified search string.

Steps to Query or View Plans

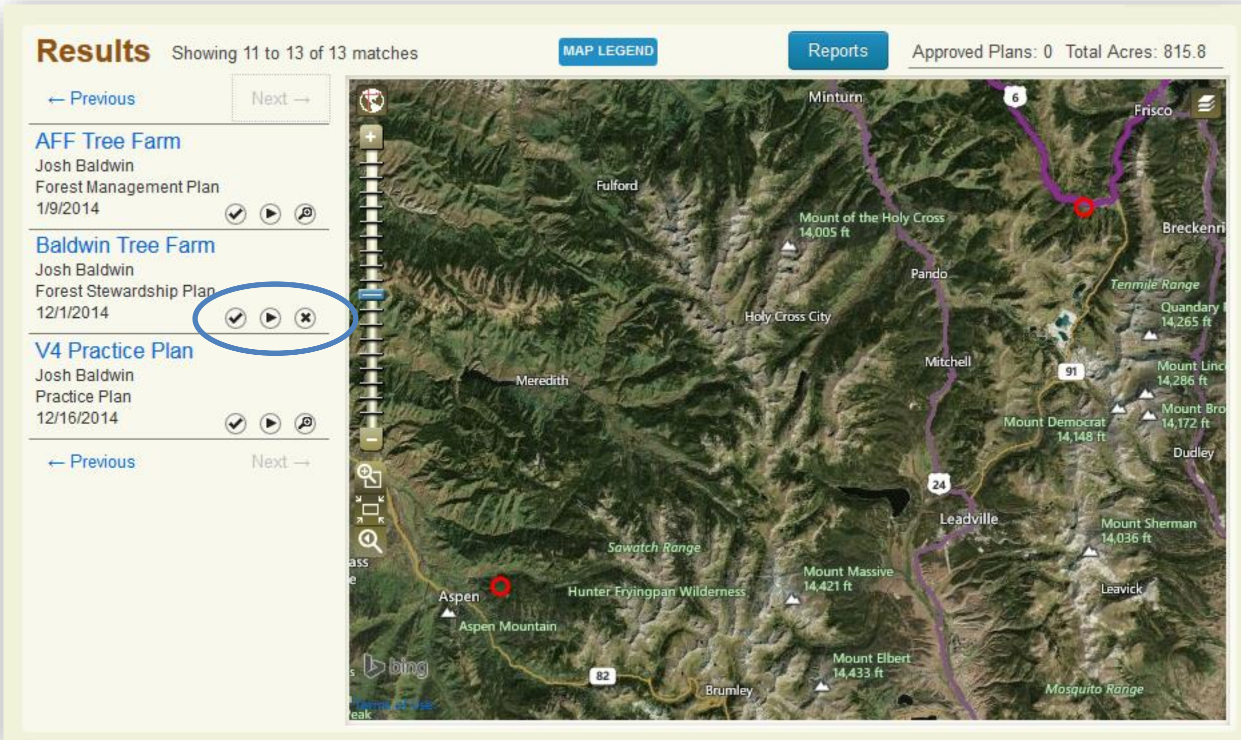
- Search for plans by typing Plan ID, Plan Name, Preparer Name, State, County, and/or Funding Code in the search bar – depending on your interest. (For more extensive help with the Stewardship Plan Finder click on the question mark).
- Once the search key is in the searc bar, type in a search parameter for the plan or plans you are looking for. (i.e. Plan_Name: GunnisonForest)



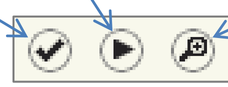
- Click **Search** to query existing plans.
- There is also an **Advanced Search** option. This allows you to search using Plan ID, Plan Name, Preparer Name, State, County, Funding Code, Other spatial categories, Plan Statuses, Percent in Priority Lands, Plan Dates, and has a *sort by* option to help organize your search results list. (see below)



All existing plans matching the specified search terms will be listed and displayed on the map. If your search has more than 5 results, you will need to scroll through the plans with the Next and Previous buttons. Each Plan in the list to the left is linked to its property on the map.



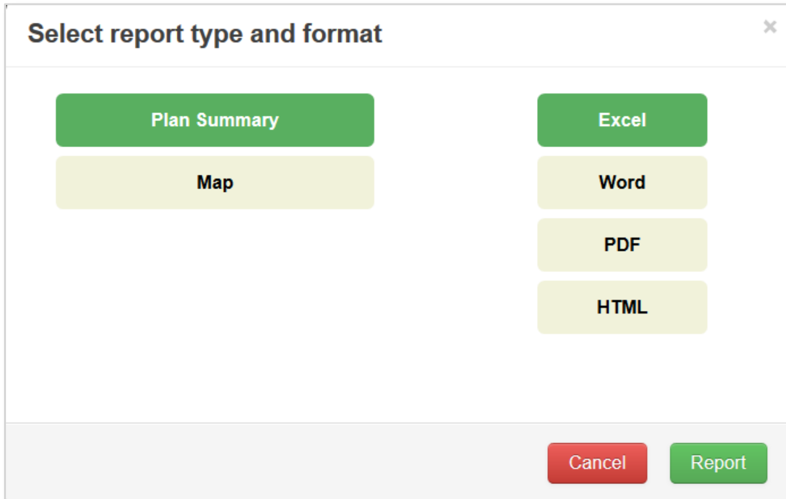
Each entry contains lifecycle information, plan status, and also an option to zoom to the plan.



- From the search results window Click on any of the plan names to view their plan summary page.
- You can also create a detailed report for all the plans in the query results by clicking the blue Reports button just above the map.

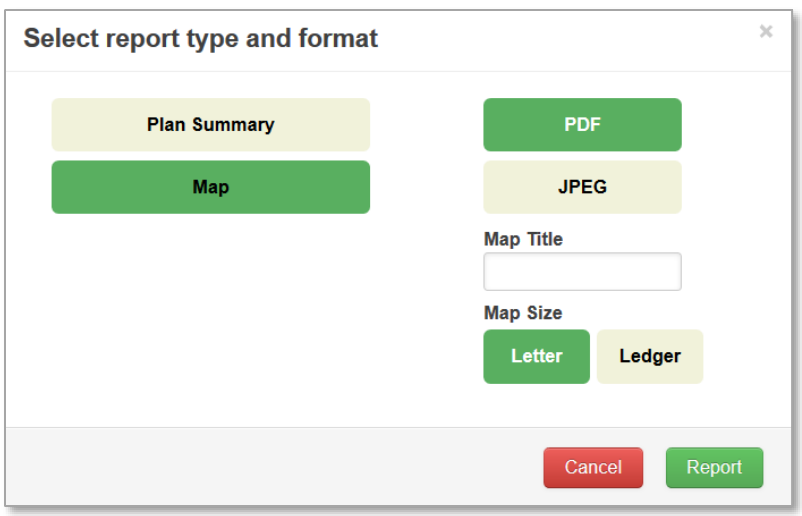
After **Reports** is selected, a window will display report options. You can create a report for Plan Summary, Funding Acres, Work Hours, or the Map. There is also an option to have the format of the report be in Excel, Word, PDF, or HTML. When selecting a Map report type, format options will change to PDF or JPEG. (See below)

Plan Summary report format list



Select the report type and format. When the report finishes downloading, you will have the option to view or save.

Map report format list



Click Map on the left, choose the format (PDF or JPEG), write in a title, and choose the size. The Map Title you enter will be displayed on the report. When the map finishes downloading, you will have the option to view or save.

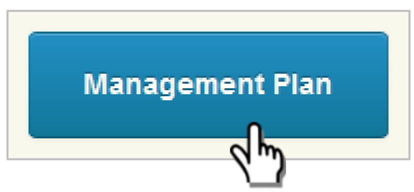
Create a New Management Plan

Forest Stewardship Plans, as well as other Management Plans, are used to detail forestry activities being undertaken as part of a formal plan for a property. A Forest Stewardship Plan is a plan that addresses individual landowner objectives while adhering to National and State Forest Stewardship Management Plan guidelines. State guidelines must consider the National Association of State Foresters (NASF) *Principles and Guides for a Well-Managed Forest*. A general outline for plans, actions and progress, as relating to these principles, can be found in NASF's A Stewardship Handbook. Please visit ***http://stateforesters.org/*** for more information.

In SMART, Plan Preparers enter plans into the database; these duties are usually delegated among staff foresters in state or local forestry teams.

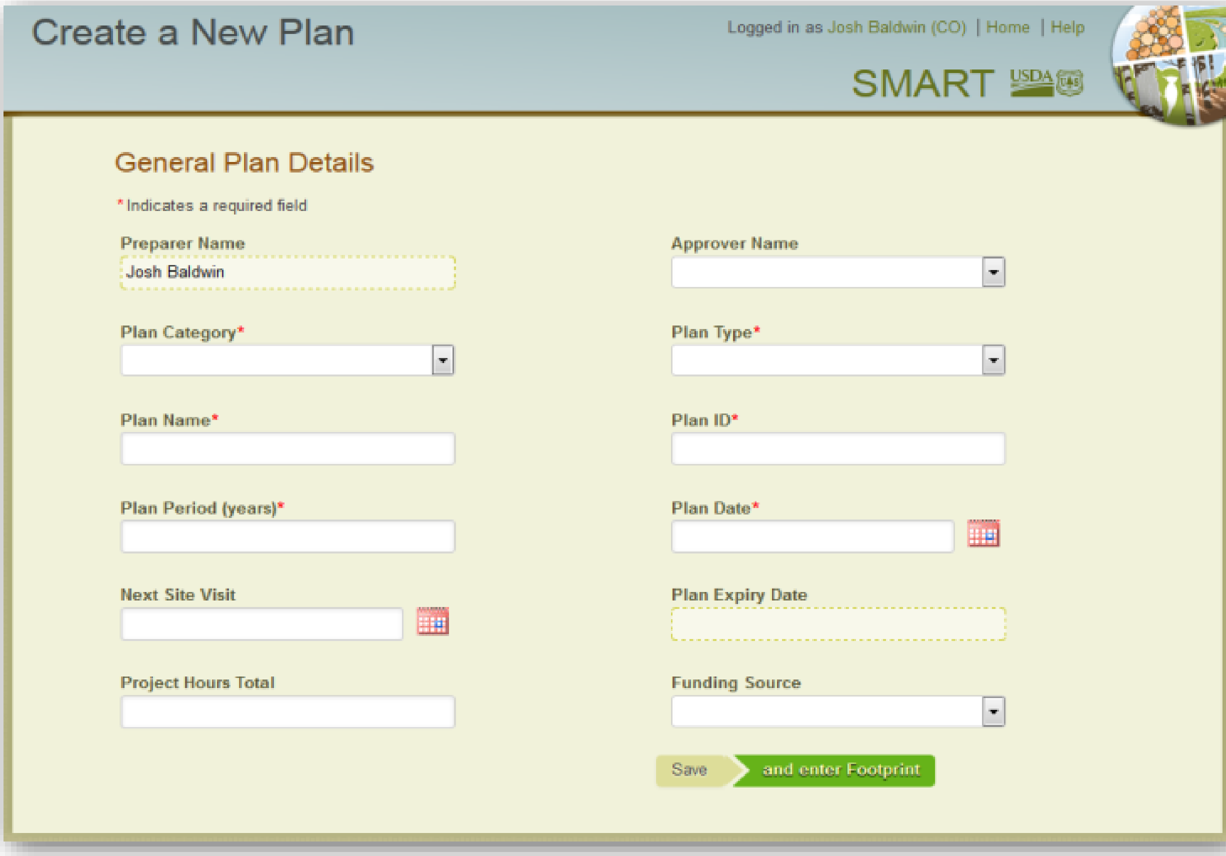
Steps to Enter a New Management Plan

1. Check to see if your plan already exists. Follow the steps outlined in the preceding *Searching for Management Plans* section to find plans. If the plan exists, you may want to consider revising it. If not, continue to Step 2.
2. Click on the Create a new: Management Plan button.



General Plan Details form

3. Fill out the General Plan Details form with information from your plan. Remember to complete all required fields marked with a red asterisk.



Guidance for Entering Required Fields

Plan Category

Please choose the category that best describes the type of management plan being entered. As of SMART Version 3.0, management plan categories other than "Stewardship" are available to choose from. If a plan does not fully meet National Forest Stewardship Program guidelines, please use the table below to determine the most appropriate Plan category. Plans may be moved from one category to another at any time; even if a plan doesn't currently meet Forest Stewardship guidelines, it may in the future – we therefore encourage you to reevaluate plans annually to see if they can be moved into the Forest Stewardship category.

Plan Type	When to Select this Plan Type
Forest Stewardship Plan	Plans that meet National Forest Stewardship Program guidelines
Forest Management Plan	Plans that meet state specific guidelines like open space, tax savings programs, or other state priorities

Plan Type	When to Select this Plan Type
Practice Plan	Plans that address focused activities like a stand prescription or cost shared activities
CAP 106 Plan	Plans that meet NRCS Requirements for CAP 106
Conservation Stewardship Plan	NRCS Conservation Stewardship Program Plans
Rehabilitation Plan	Plans that address corrective action or rehabilitation treatments
Harvest Plan	Plans that address harvesting activities, road layout and construction, bridges, and culverts
Wildfire Mitigation Plan	Plans that address fuels reduction, wildfire mitigation, and defensible space
Planting and Regeneration Plan	Plans that address planting, replanting, afforestation, reforestation, and windbreaks

Plan Type

New – Choose this if the plan being entered is a new plan for your organization.
Revised – Choose this if there has been a formal revision to the plan. If a plan is marked as revised in the database, it will not be counted as a new plan for the current fiscal year. If you want the plan to be counted as a new plan, you must change the start date of the plan to occur within the current fiscal year.

Plan Name

This will be used as the primary plan identifier for the plan report. Please follow your state's guidance regarding plan name. Many states use some portion of the landowner's last name in the plan name (e.g., "Smith Tree Farm"); as long as there is no explicit personal identifiable information (PII) within the plan name, this is allowable.

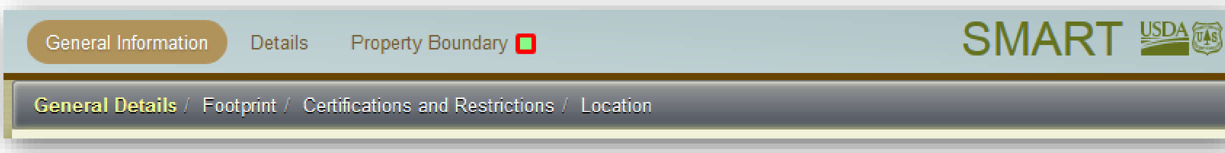
Plan ID

Please enter a unique Plan ID, in the format and specifications of your state's Plan ID system. It is important to choose a consistent, replicable Plan ID format. This is an important field in the SMART database, as the duplicate plan management tool finds matching plans based on the Plan ID field. Many states have adopted a SMART Plan ID that mirrors their internal database ID field. One example is "14_FSP_JB_012"; wherein *14* is the year, *FSP* is the plan category, *JB* are the initials of the plan preparer, and *012* is a plan number associated with the plan preparer.

Plan Period (years)
This is the number of years covered by the plan (must be entered in whole numbers). Standard plan length for the Forest Stewardship Program is 10 years; however, each state may set this length for any reasonable period. Once a plan has expired, it is set as inactive and will not be able to be edited.

Plan Date
This is the plan start date, and is typically the date the landowner signs the plan. For reporting purposes, a plan is considered "new" if its plan date occurs in the current fiscal year (Oct. 1 through Sept. 30). Although SMART sends out expiration notices when plans are reaching their end date, we recommend plan preparers go through their SMART plans annually and revise plans as needed.

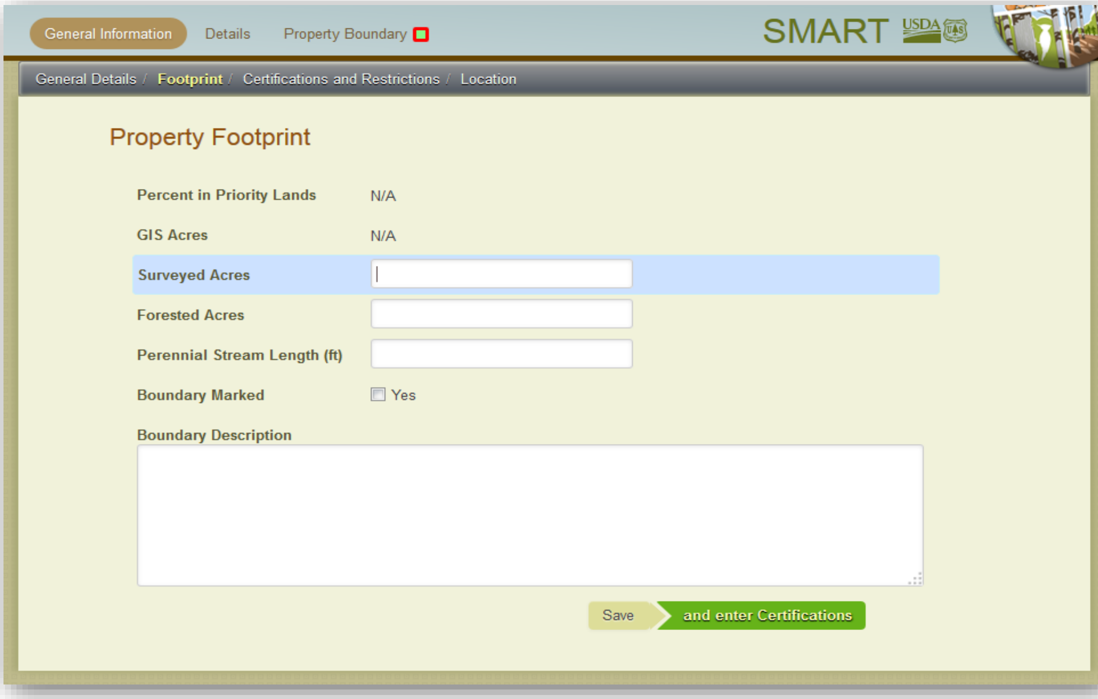
4. Select the "Save" or "Save and enter Footprint" button when you are finished entering the general plan details. Once you have saved your progress, notice a group of tabs have become available in the upper left hand corner of the page.



Property Footprint form

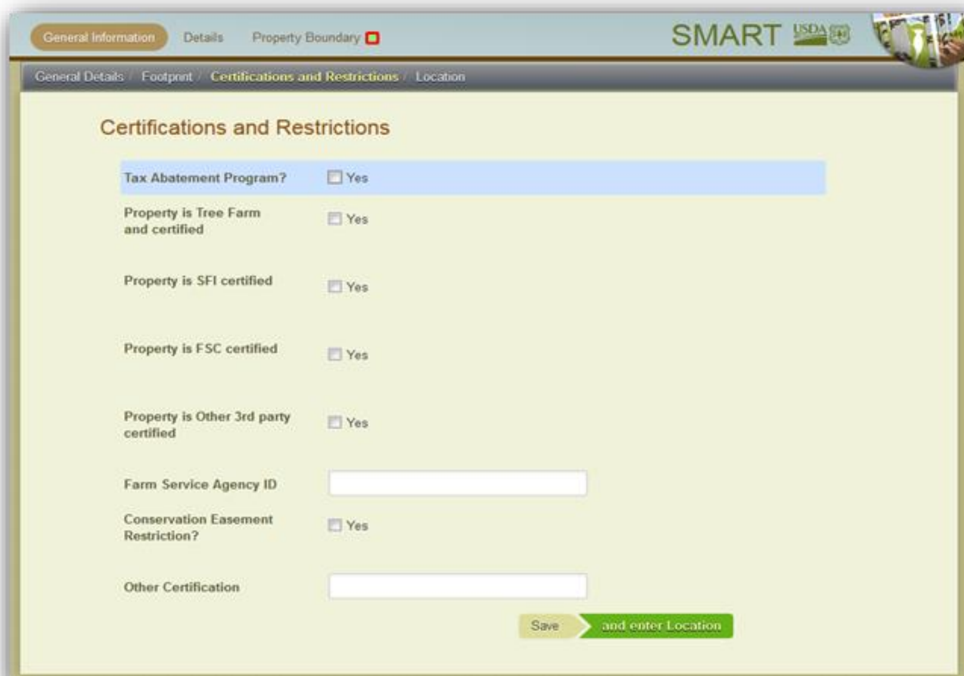
The *Percent in Priority Lands* and *GIS Acres* fields will not have numbers yet, as these are calculated once a property boundary has been added to the Plan.

5. If an official land survey or GPS data is available, you may enter the acreage in the Surveyed Acres field. *Warning* **Be very careful when using the Surveyed Acres field! Any numbers entered in this field will be reflected in your state's Fiscal Year accomplishments reporting, instead of those calculated from the property boundary GIS acres.** We recommend drawing in or uploading the property boundary first to get a baseline acres count, and then entering in the Surveyed Acres. This will provide quality assurance that the surveyed acres you are entering are accurate. You may fill out the Forested Acres, Perennial Stream Length, and Boundary Description fields. Finally, select "Save" or "Save and enter Certifications".



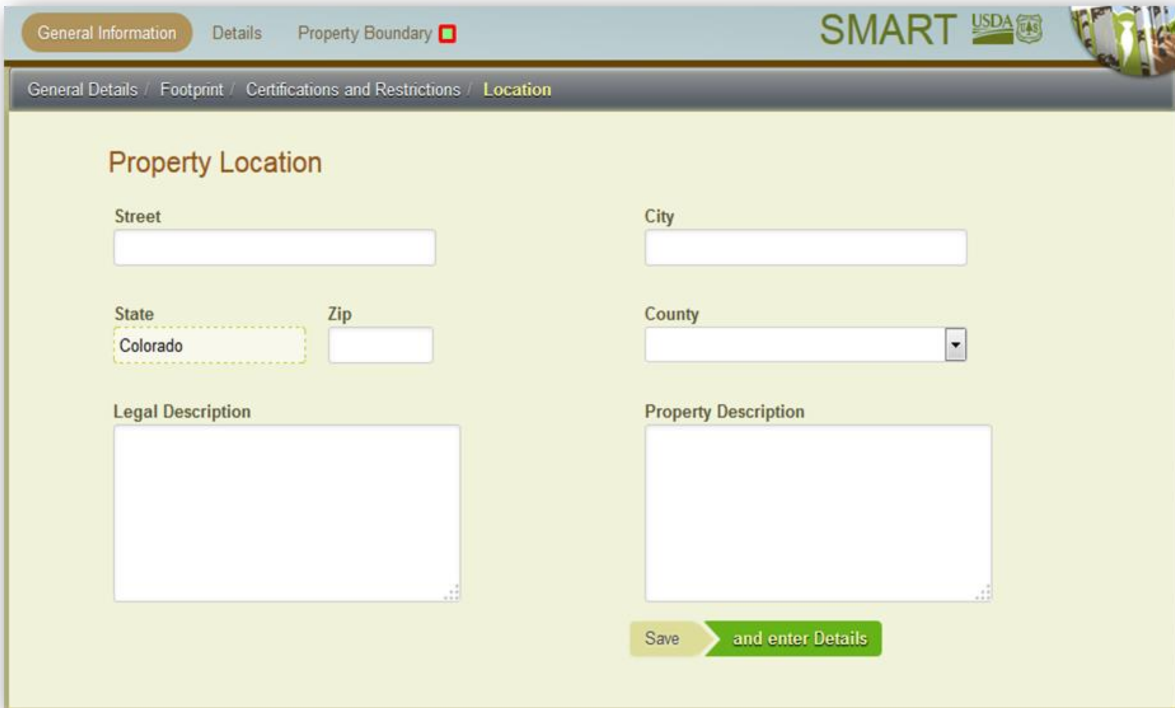
Certifications and Restrictions form

6. Check any boxes and fill in any text fields that apply to your plan. Be sure to Save the page when you are finished to move on.



Property Location Form

7. At this page you may enter the location of your property. The Street address, City, Zip, and County forms are linked to the mapping interface in the next step. If information is entered here, the mapping interface will zoom to the geographic location that is entered on this page. For example, if you enter only County information, the map will zoom to the scale of the property's county; if you enter the Street address as well, the map will zoom to the scale of the property's address).

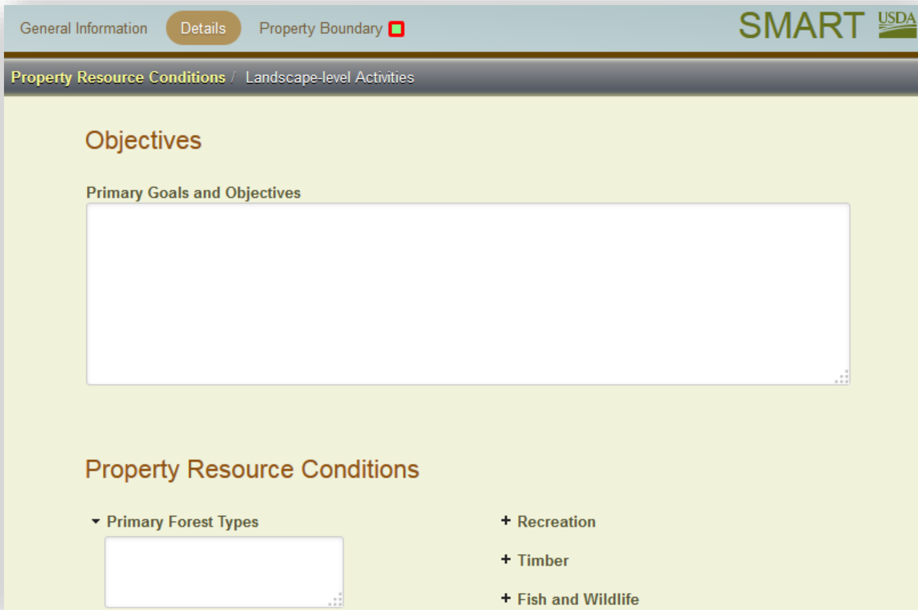


- It is not required to enter a County at this stage; once a property boundary has been entered, the county field will be filled with the appropriate county.
- Legal Description and Property Description forms are not required fields, but depending on the requirements of the plan, you may want to fill these out now or at a later date.

Select Save and enter Details to move to the Plan Details page.

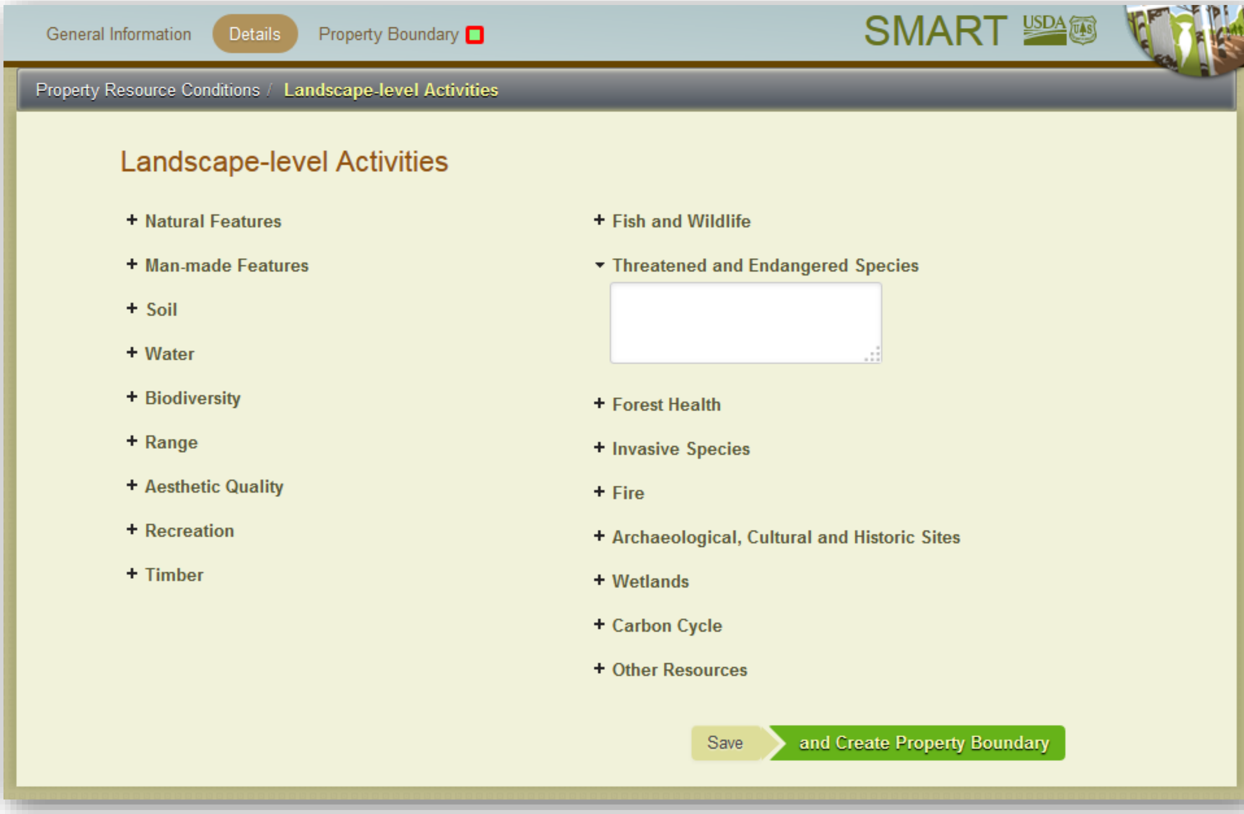
Details tab

1. At this screen you may fill in the Primary Goals and Objectives as well as Property Resource Conditions related to the property.



   You can enter property resource conditions by clicking on the plus signs (+) next to each relevant section. The character limit for all of the fields in the Details section is 4000 characters – roughly one page of normal text. Once you finish filling out this information, select Save and enter Landscape-level Activities.

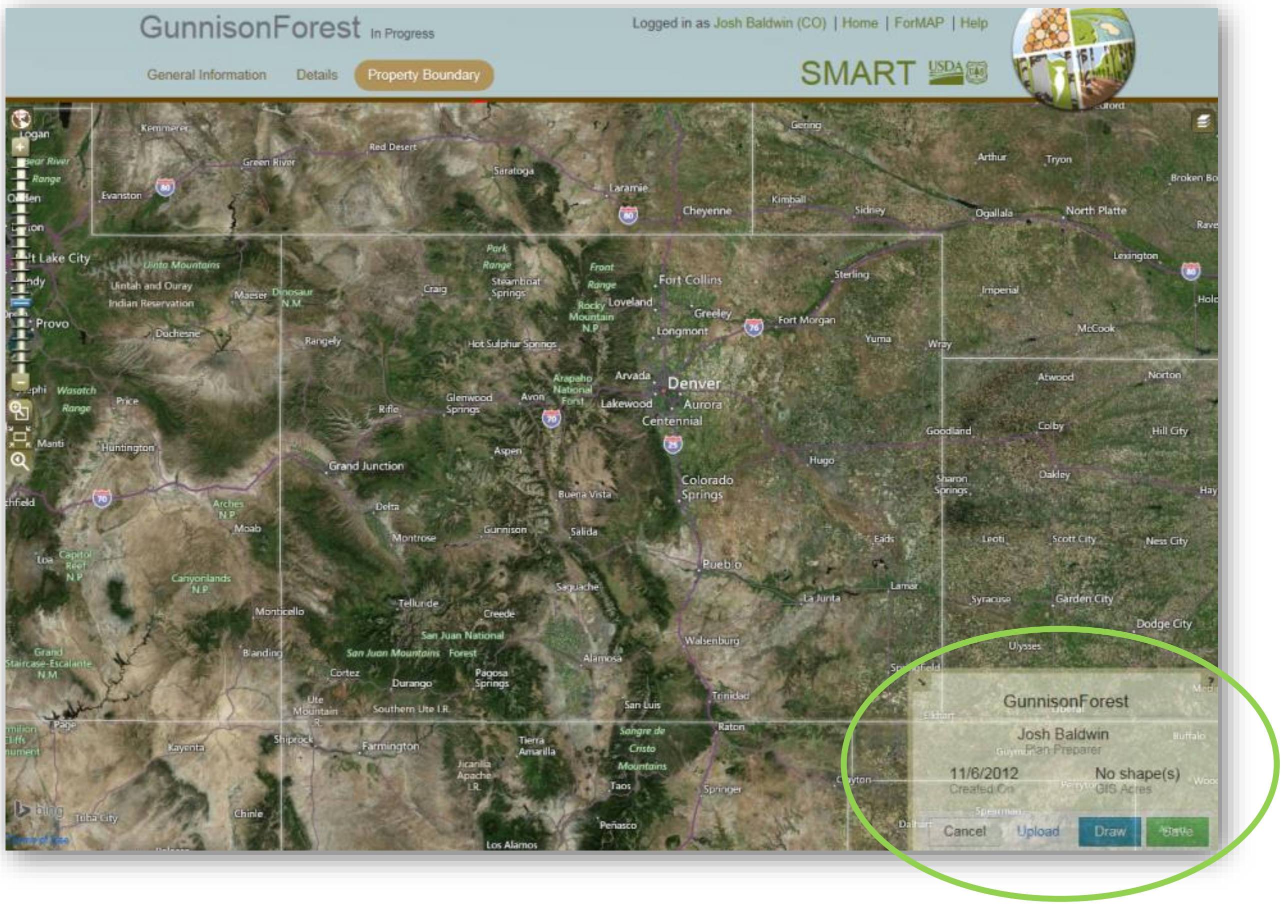
2. This will bring you to the Landscape-level Activities page (below), also under the Details tab. Here you may enter any landscape-level activities pertinent to the management plan. The Forest Stewardship Program does not require stewardship plans to list landscape-level activities, but they do encourage plan writers to talk to landowners about how their properties impact, and can be impacted by, the larger landscape.



3. When you are finished, select the Save and Create Property Boundary button, this will take you to the property boundary map. When the next page loads, the mapping interface will zoom to the street address, city, or county that you selected in the Location section. If no property information is entered, the mapping interface will zoom to the Plan Preparer's state.

Property Boundary Tab

This is the mapping interface on the Property Boundary tab:



The plan information box is displayed in the bottom right corner of your screen. It shows general plan information and basic web application functions. If you place your curser over this box it becomes opaque and is easier to view.

At this point of plan creation, you can upload or draw a property boundary. Before doing this, please explore the map zoom and place finder tools.

Using the Zoom and Place finder tool

Upon opening the property boundary tab, a zoom bar and a place finder icon on the left side of your screen will be shown (see below). This allows you to find your property on the map easily.

Place finder – Allows you to search for your location using decimal degree coordinates, city, state, or exact and partial address.

Zoom Bar – Allows you to change the scale of your map.

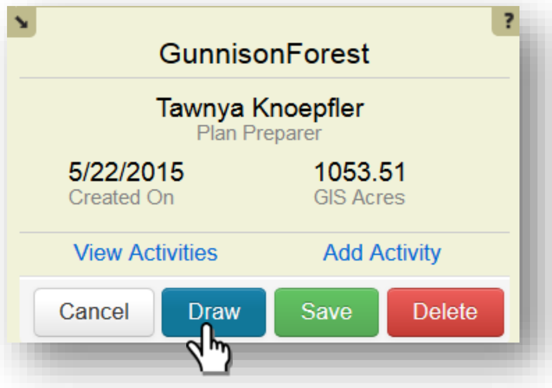
Zoom by box – Allows you to draw a box around an area and zoom to the extent of the box created.

Zoom to data extent – This will zoom to the extent of the data currently saved to the map.

Previous extent – Allows you to zoom to the previous map scale.

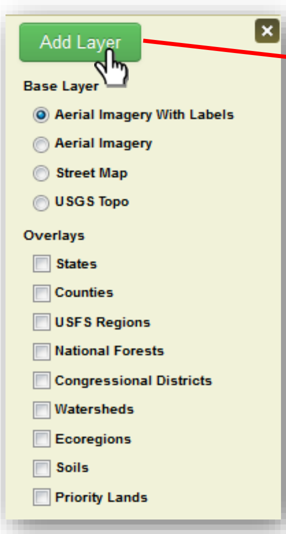
Creating a Property Boundary

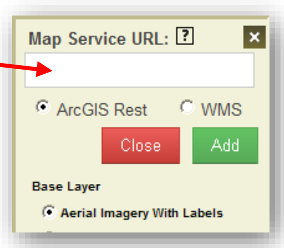
1. Select Draw in the box in the bottom right hand corner



2. You will then see a red circle become connected to the end of your cursor. The center of this circle is where points will be created as you digitize your property boundary.
3. Please zoom in to a comfortable scale for your property and begin clicking along the boundary. SMART allows you to pan as you go without losing what you have already digitized by clicking, holding down the mouse, and dragging the map. Once you have finished digitizing the boundary, double click on the final point to finish.

You have the option to Add Layers to help digitize the property boundary. In the upper right-hand corner of the map you will see the layers button – . Select it and a list of available layers are shown (see below). From this list you can choose one base layer and as many overlays as you would like. You can also click the Add Layer button if you would like to add a map service layer from an online GIS server.



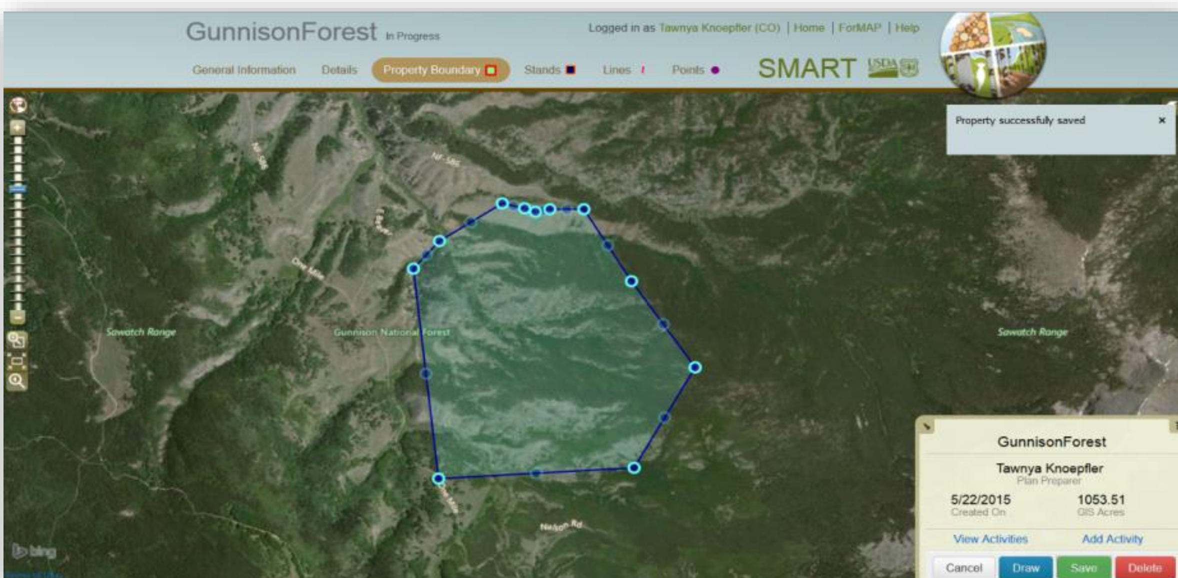


Map services are georeferenced map images that are generated by a map server using data from a GIS database. Map services are hosted by an array of state, federal, and for-profit entities. Most states host numerous map services. We recommend contacting your state DNR or GIS division for details.

Editing Tips, as you draw your boundary:

- You can pan while digitizing by left-clicking and holding the mouse button; this allows you to drag the map
- Hovering your cursor over a vertex and pressing the delete key on your keyboard will delete the vertex
- Pressing the Alt key allows you to draw a second polygon (a donut) within a property boundary
- Pressing Shift and left-click while moving the cursor will draw a freehand polygon
- Pressing the esc key will remove everything you have digitized up to that point (your entire property boundary)
- Using ctrl+z will delete the most recent line you have drawn back to the last vertex

4. Select SAVE to save your property boundary, a box will pop up in the upper right-hand corner letting you know your plan was saved successfully. If there is a problem with the boundary shape, an error message will be shown. An example of the Gunnison Boundary is below.

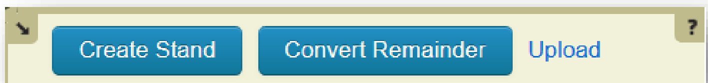


The Forest Stewardship Program recommends uploading a polygon of the property, if possible. Adding the polygon in SMART will require using the ShapeUp desktop application or ShapeUp add-in for ArcMap. *Please refer to the *ShapeUp Tools* chapter for information on downloading and using the ShapeUp tools.

Creating a Stand

Creating a stand is very similar to drawing a property boundary. At the top of the screen you may select the *Stands* tab to move on from the property boundary screen, and create stands. A map with your property boundary on it will now be displayed.

In the bottom right hand corner, you will see a box that gives you the options to create a stand, convert the remainder, or upload a stand.



When you choose *Create Stand* it will allow you to draw a stand by hand. This option lets you digitize the stand and creates nodes as you go, for editing purposes. Uploading a polygon with the ShapeUp tools is also an option; please refer to the *ShapeUp Tools* chapter for information on downloading and using the ShapeUp tools.

Donut Stands

To create a stand within a stand (Donut stand) you must first select the stand by clicking inside it. Then select the *Split* button. Now it will allow you to draw a stand within a stand by splitting the outside stand into two stands. You will then have the option to rename the two stands.

Vertex Editing

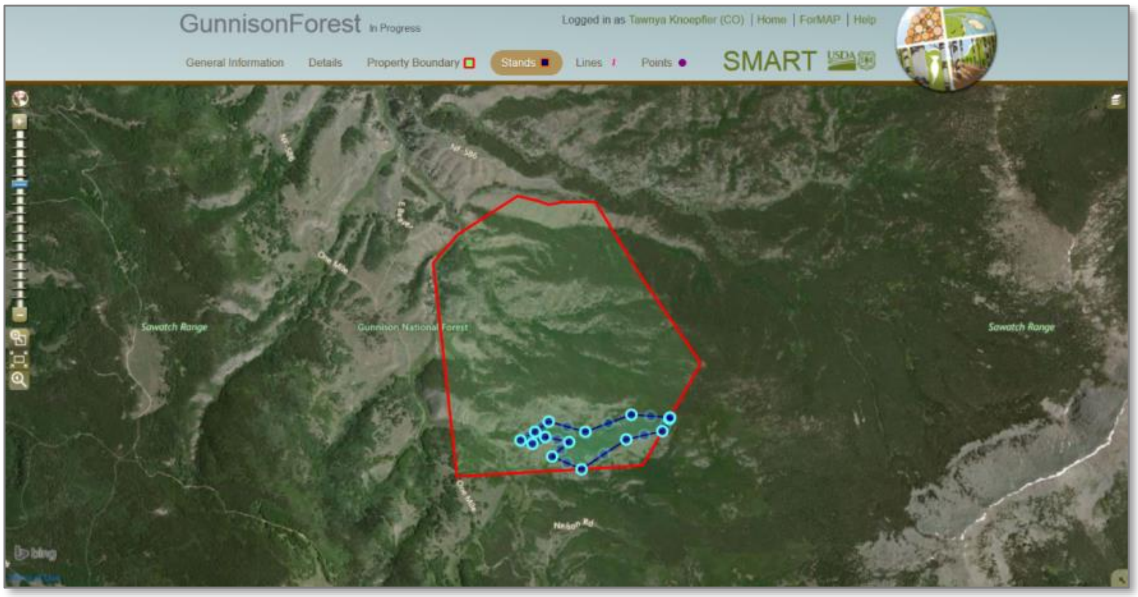
When a stand is selected it will show the vertices associated with it.

- This allows you to click and drag the vertex to adjust the stand boundary. As you adjust the stand it will create new vertex to compensate for the new boundary edges that are being created.
- You will also see a light colored vertex between the dark vertices, these do not actually exist until you click and drag them to a new location. They are available for additional boundary editing.
- You can also hover the cursor over a vertex and hit the delete key on your keyboard to remove it.

Once you have digitized your stand you will see it in a light green color. Also the box in the bottom right of your screen will change to a Stand Attributes box. At this point give your stand a recognizable name and a compartment name if applicable, then click *Save*. A box will appear on the screen notifying you if your stand was saved successfully.

Adding Existing Conditions, Desired Conditions, and Activities to a Stand

Once the Stand is saved you may then add stand activities and other attributes. Click the stand to select it; the vertices will turn blue.

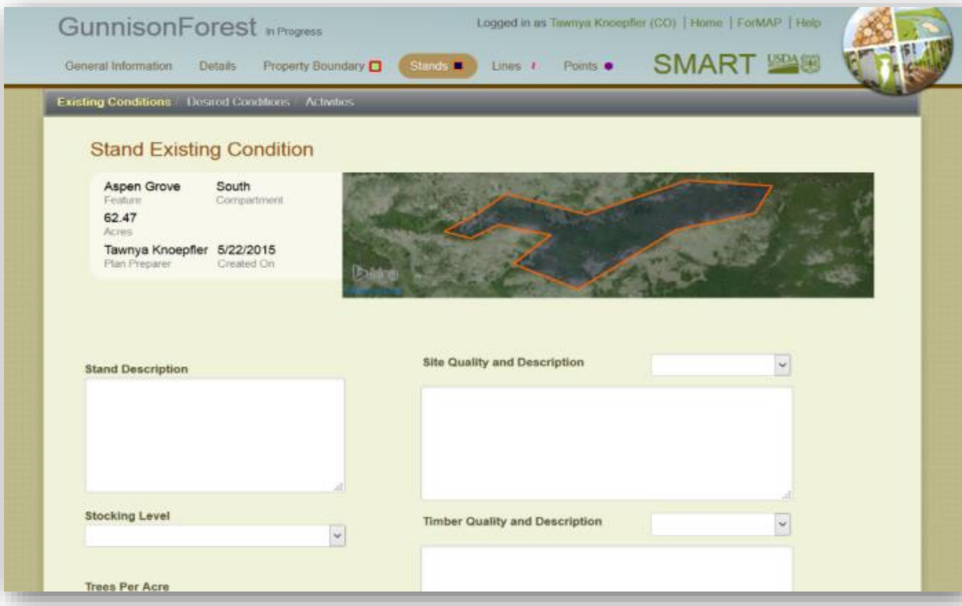


Below is the attribute box that will be available for each stand when it is selected. Existing Conditions, Desired Conditions, and Activities are available for editing. (See image below)

Stand Existing Conditions

The Stand Existing Conditions form captures information about the current condition of resources contained *within* the stand. It is here that you would record cruise data and detailed information about the trees and vegetation in the stand.

5. Click on the **Existing Conditions** link to open the page.



Stand Existing Conditions Elements (Reporting Elements)

Acres	Area of stand in acres, reported by forester.
Accept Basal Area	Target basal area for trees in this stand.
Age (Years)	Average age of trees in this stand.
Basal Area	Statistical figure describing density and volume of timber in a stand. Calculated by totaling the cross sectional areas at 4.5 feet above the ground for a sample of trees in the stand, and extrapolating it for the stand. Expressed as area per acre.
Cover Type 1	Dominant species found in stand.
Cover Type 2	Co-dominant species found in stand.
**Current Access*	[True/False] Indicates whether stand is accessible by road.

Ground Cover	Type of vegetation that is on the ground.
Est. Growth	Expression of rate of growth for trees in stand.
Fire Hazard Rating	Description of level of fire danger in stand.
Fire Hazard Rating Method	Reference to established method of rating fire danger, and source for values provided in response to Fire Hazard Rating.
Mean Stand Diameter	Calculated average diameter of trees in stand, usually in inches.
**Size Class*	[Seedlings/Saplings/Poles/Small Sawlogs/Medium Sawlogs/Large Sawlogs/Other/Unknown] Standardized categories for expressing the size of trees in the stand. Usually used for timber harvest planning.
Site Index	Calculated index figure expressing the expected potential of the stand for supporting vegetation.
Site Index Species	Species of the individual tree that is determined to be representative of the typical tree found in the stand.
Stand Description	Descriptive notes summarizing characteristics of the stand.
Stand Volume	Figure expressing volume of lumber expected from stand in harvest.
**Stand Volume Units*	Volume units applying to figure given for Stand Volume.
**Stocking Level*	[Overstocked/Understocked/Sparse/Non-Stocked/Adequately Stocked] Expression of the density of trees found in the stand. Inquire with your agency for the range of values that defines each of these categories.
Timber Cruise Accuracy	Measure of accuracy of the cruise that was used to determine these figures. Often given as a percent error/accuracy.
**Timber Cruise Type*	Name of cruise method used to evaluate this stand.
Trees / Acre	Numeric value expressing average number of trees per acre in stand.

Stand Existing Conditions Elements with Pick Lists

Stocking Level Overstocked Understocked Sparse Non-Stocked Adequately Stocked ***Timber Cruise Type*** 100% Cruise Variable Radius Plot (5 BAF) Variable Radius Plot (10 BAF) Variable Radius Plot (20 BAF) Variable Radius Plot (40 BAF) Fixed Area Plot (1/700th ac) Fixed Area Plot (1/20th ac) Fixed Area Plot (1/5th ac) Ocular Estimate (appx. 1/2 ac) Other	***Size Class*** Seedlings Saplings (1-5 in) Poles (5.5-11.5 in) Small Sawlogs (11.5-17.5 in) Medium Sawlogs (17.5-23.5 in) Large Sawlogs (23.5 +) Other Unknown ***Stand Volume Units*** CUFT BDFT (Int 1/4 kerf) Cords Tons Metric Tons BDFT (Doyle) BDFT (Scribner) Unknown

Stand Existing Conditions Elements (Non-Reporting, Free Text Elements)

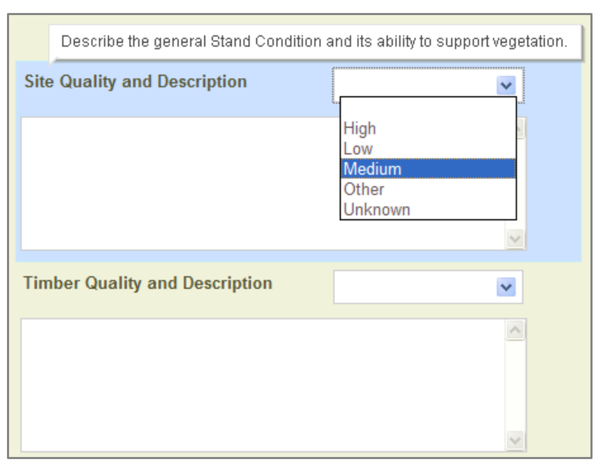
Dominant Vegetation	Notes about primary plant and cover types found on site.
Ground Cover	Details on conditions of cover on the ground surface (i.e. grasses, forbs, bare soil, etc.)
Health	Assessment of the general health of the stand, including timber and soil resources, among others present.
History	Historical events affecting the stand area. Notes about logging events and fire should be included here.
Insect & Disease Activity	Detailed notes describing presence or absence of insects, diseases, or pests.
Manmade Features	Inventory of human-built features in the stand area including structures, fences, mines, wells, etc.
Natural Features	Inventory of special natural features occurring in the stand area, including rock outcroppings, springs, and ponds.

Noxious Vegetation	Notes and inventory of invasive, troublesome species of plants that occupy the stand area.
Operations Limits	Notes about constraints to accessing the site with vehicles and equipment.
Regeneration Stocking	Notes about the level of regeneration tree or plant species that is occurring, naturally or human-assisted, in the stand area.
Shrub Layer	Inventory of species comprising the forest understory (i.e. Gambel oak, sagebrush, mountain mahogany) and open areas in the stand.
**Site Quality*	Qualitative notes about the general stand condition and its ability to support vegetation. Drop-down pick list included (see illustration, below).
Soil Type	Description of soils occurring in stand area.
T & E Species	List of any threatened or endangered plant or animals species found in the stand area for which consideration must be paid when operations are conducted in the area.
**Timber Quality*	Qualitative notes on the tree health of the stand and how that may affect its value at harvest. Drop-down pick list included (see illustration, below).
Water Quality	Notes on condition of water features in the stand area.
Wetlands	Notes on the condition of marshy areas occurring in the stand area.

*Denotes fields having pick lists, detailed in the next section. Data entry in fields limited to 1000 characters.

Site Quality & Timber Quality Pick Lists

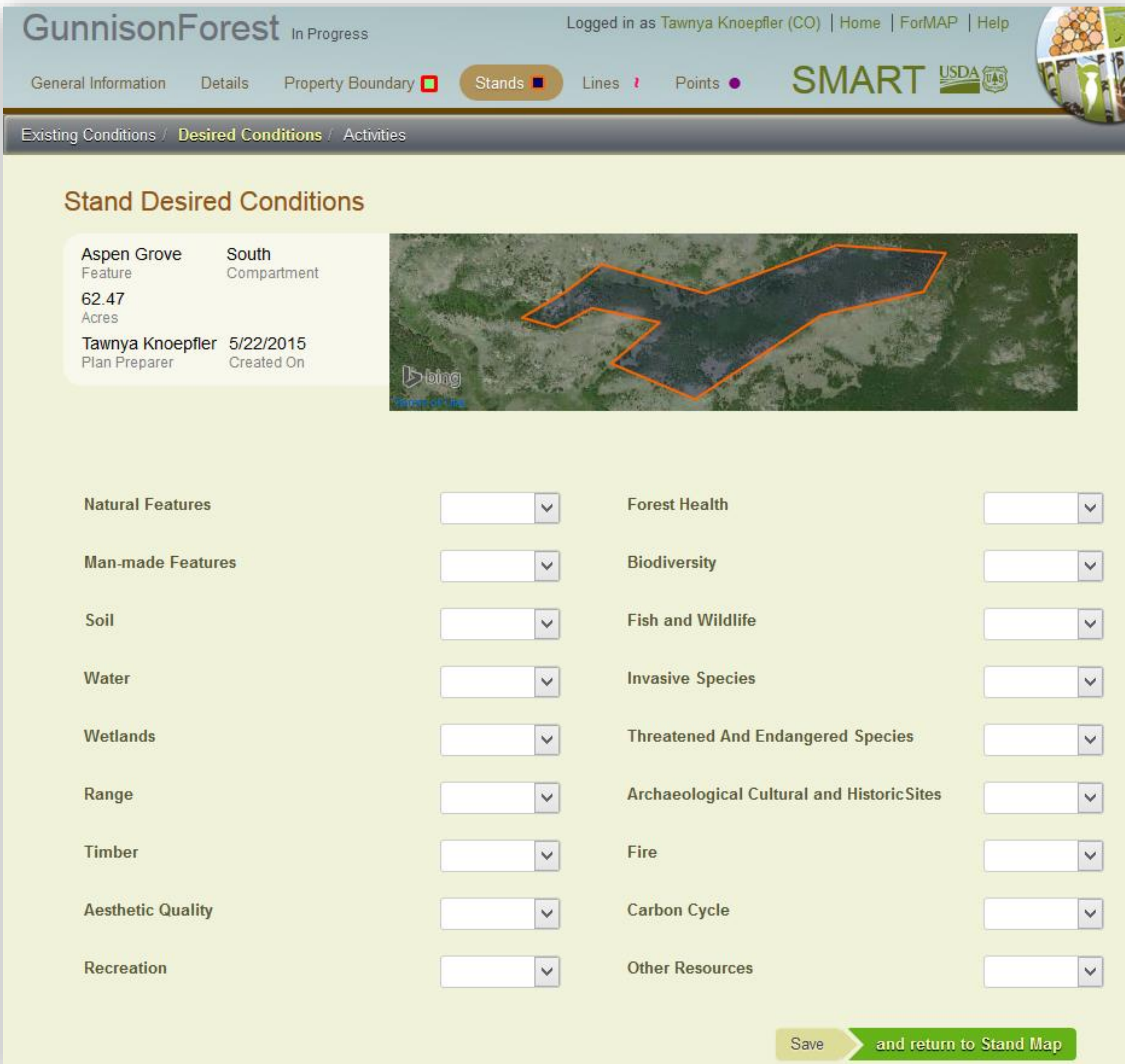
These fields have accompanying pick lists with standardized choices for rating the applicable qualitative values. Refer to your organization's instructions on the proper use of these values.



Stand Desired Condition (Potential)

The Stand Desired Condition form captures information about the potential future condition of resources contained within the stand. It is here that you would record prescribed actions affecting each of the resource elements included and describe how that would affect the future condition of these resources.

6. Click on the **Desired Conditions** link and fill out the Stand Desired Condition form. Click Save when finished.

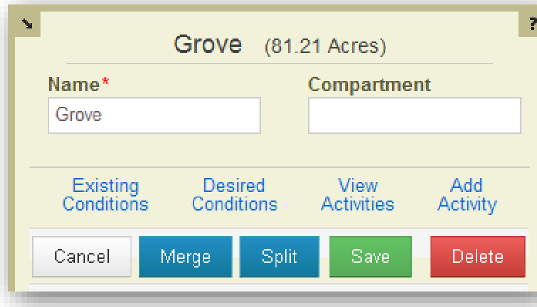


Stand Desired Condition Elements

Aesthetic Quality	Describe the desired Aesthetic Quality.
Archaeological/ Cultural/ Historic Sites	Describe any existing significant Archaeological, Cultural, and/or Historic Sites.
Biodiversity	Describe desired site Biodiversity.
Carbon Cycle	Describe general desired site Carbon Cycle storage capacity.
Fire	Desired Fire condition.
Fish & Wildlife	Describe desired condition of fish and wildlife habitat.
Forest Health	Describe the presence or absence of insects, diseases, or pests.
Invasive Species	Describe the Invasive, troublesome Species of plants that occupy the Stand area.
Man-made Features	Describe the desired condition of Human-built Features in the Stand area including structures, fences, mines, wells, etc.
Natural Features	Describe the desired condition for Natural Features.
Other Resources	Describe the desired conditions of Other Resources.
Range	Describe the desired type and condition of Range vegetation and resources in the stand area.
Recreation	Describe the desired Recreational uses.
Soil	Describe the desired condition of soils in the Stand area.
Threatened & Endangered Species	Describe desired presence of any Threatened and /or Endangered Species.
Timber	Describe the desired condition of Timber.
Water	Describe the desired conditions of Water features in the Stand area.
Wetlands	Describe the type and condition of marshy areas occurring in the Stand area.

Adding New Activities

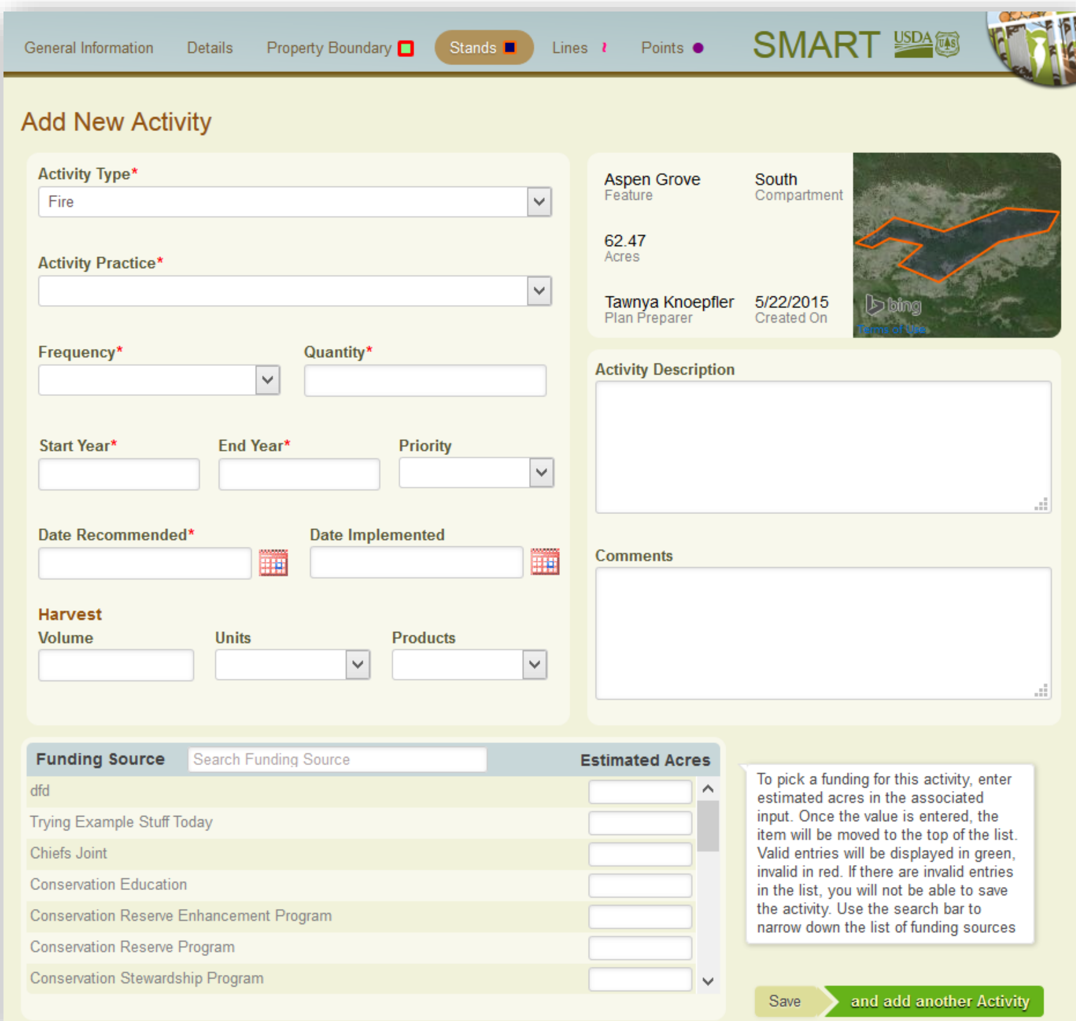
To add an activity to a stand you must first select your stand. In the box on the bottom right of your screen, select Add Activity.



1. The Add Activity link will bring you to the screen below. This screen will show you basic stand information and a variety of activity information that can be filled in.

Required Fields are marked with a red asterisk, and they are:

- Activity type, Activity Practice, Frequency, Quantity, Start Year, End Year, Date Recommended

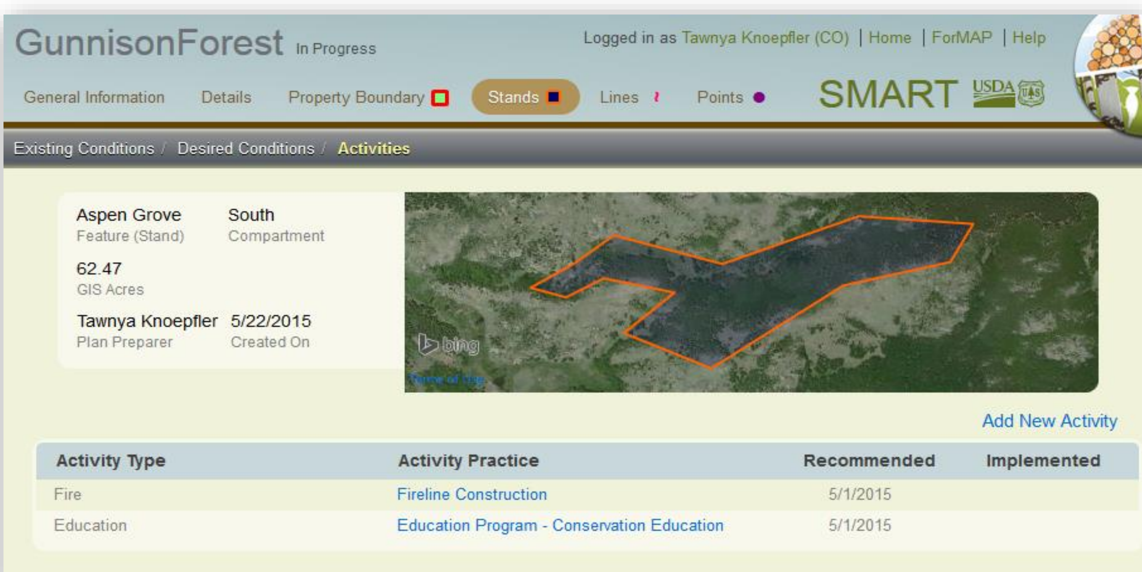


2. Once the required fields and any other information you would like to add has been entered, you can select **Save** or **Save and add another Activity**. Selecting *Save* will save your information to the SMART database and keep you on the current activity page. Selecting *Save and add another Activity* will bring you to a new activity page, where you may add another activity. To get back to the stands map, you will need to select the *Stands* button at the top of the page.

View Activities

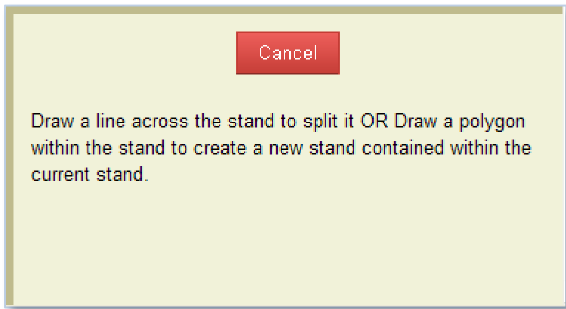
1. Once Activities have been added to a stand, you are then able to go back and view them for each stand. When the stand is selected you can select **View Activites** in the bottom right window.

2. When **View Activities** is clicked the page below will be displayed. It shows a list of all the activities that are associated with the selected stand and some basic information about that activity. If you would like more information about an activity, or would like to edit it, you can click the activies link under the Activity Practice.

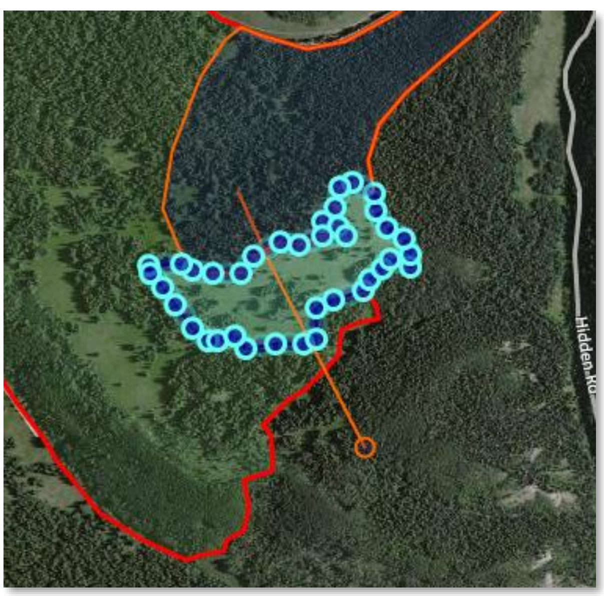


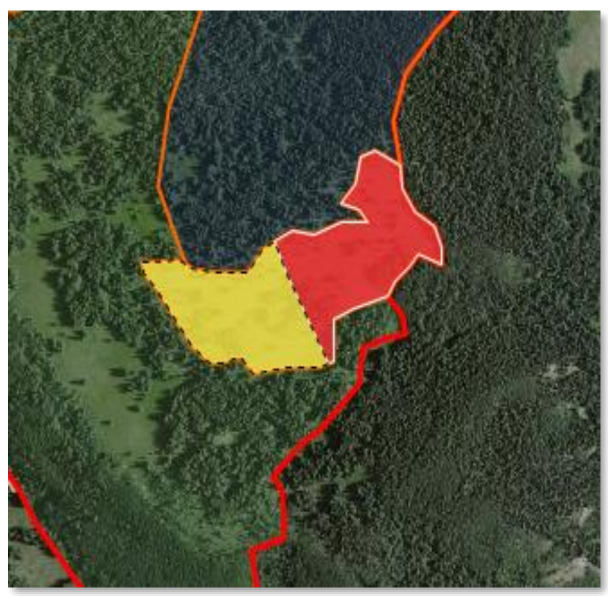
Splitting a Stand into Multiple Stands

1. To split a stand, you must first select the stand that you would like to split. Once it is selected you will see the window on the bottom right adjust accordingly. In this window you will click the *Split* button.
2. When the window changes to the directions below, you are ready to draw where you would like to split the stand.



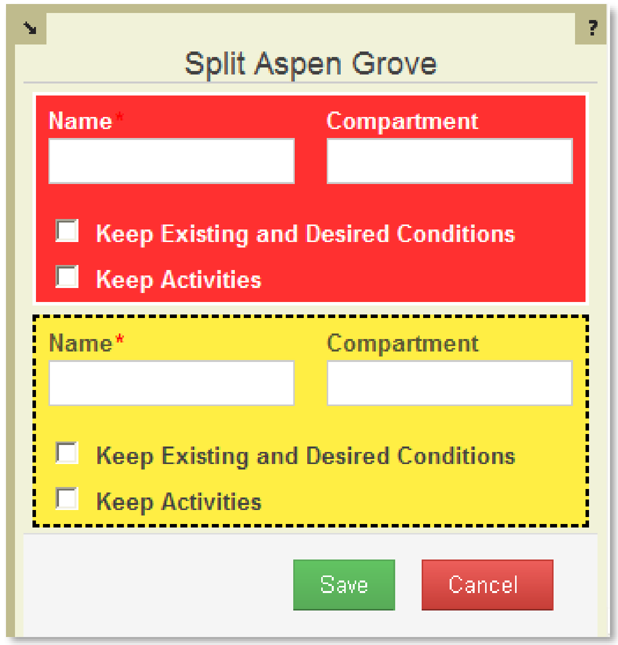
3. The examples below show the stand being split into two stands by clicking outside of the stand and drawing a line across the stand in the desired location. When your line completely crosses the stand, you can double click to complete the split. When the split is complete, the two new stands will show up in red and yellow. The red and yellow stands will correspond with the window in the lower right to help in naming the stands



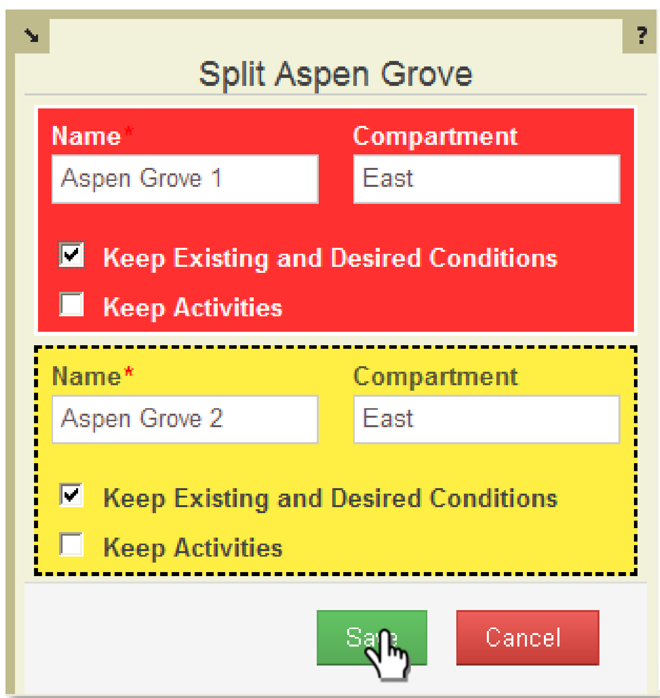


.

4. Now you are able to name the two new stands and add their compartment if applicable. This window also allows you to check boxes to **Keep Existing and Desired Conditions and/or Keep Activities**. This refers to the existing and desired conditions and activities that were linked to the original stand being split.

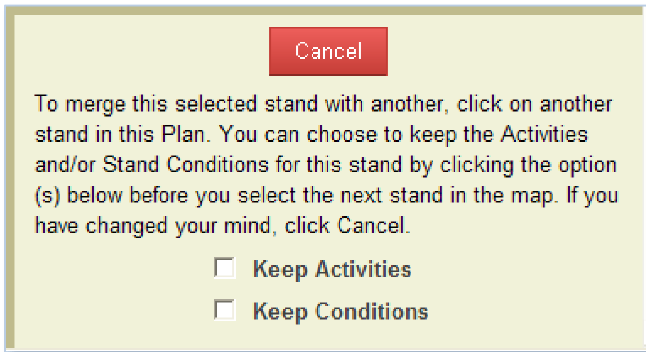


5. When the fields for both stands have been filled in, select Save to complete the split.

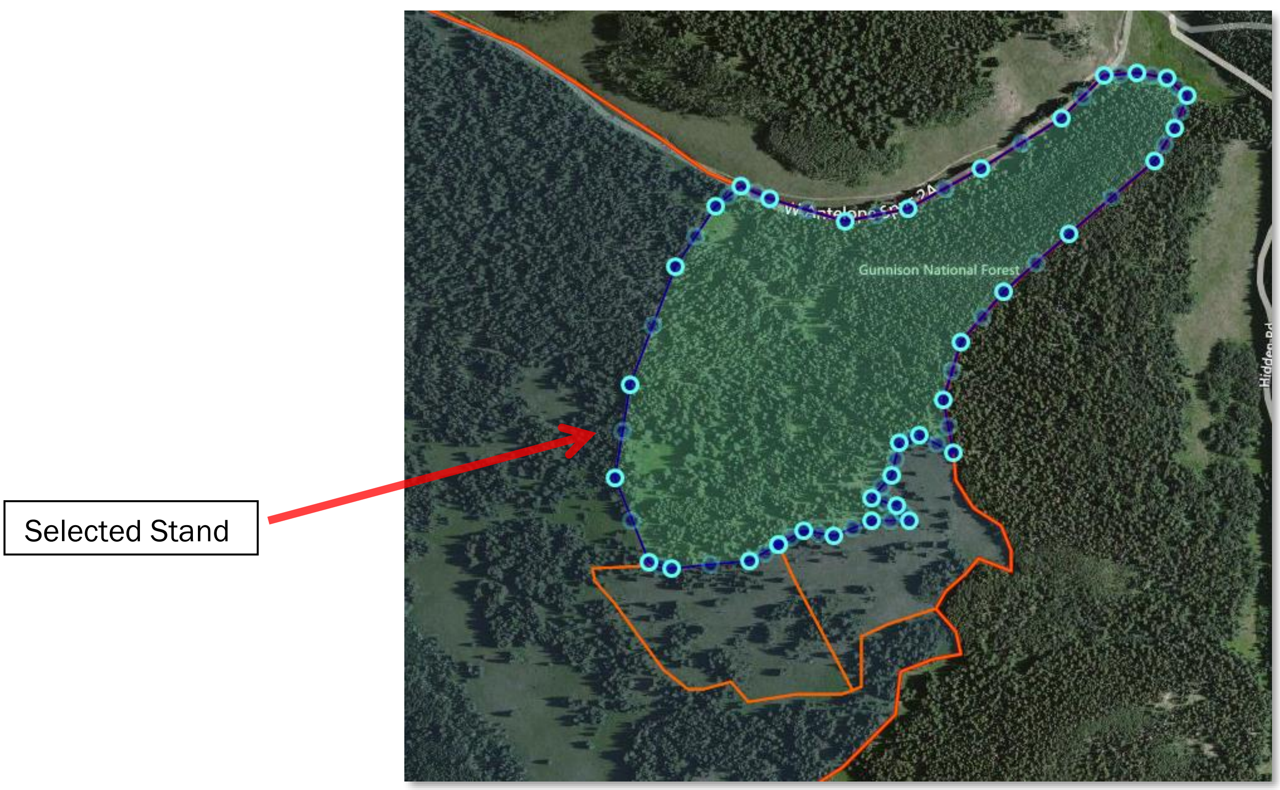


Merging Stands

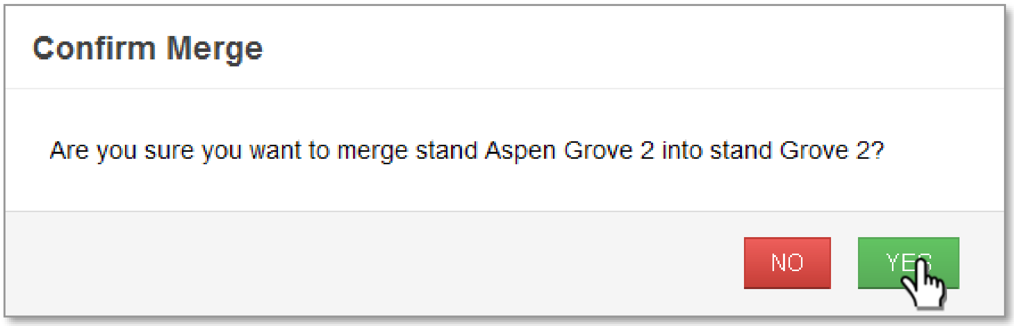
1. To merge two stands together you will first need to select one of the stands that you would like to merge. Then in the bottom right stand window select *Merge*.
2. You will see the window change to the directions below. From here you can cancel the merge and select whether you want to add the activities and conditions to the stand you merge with.



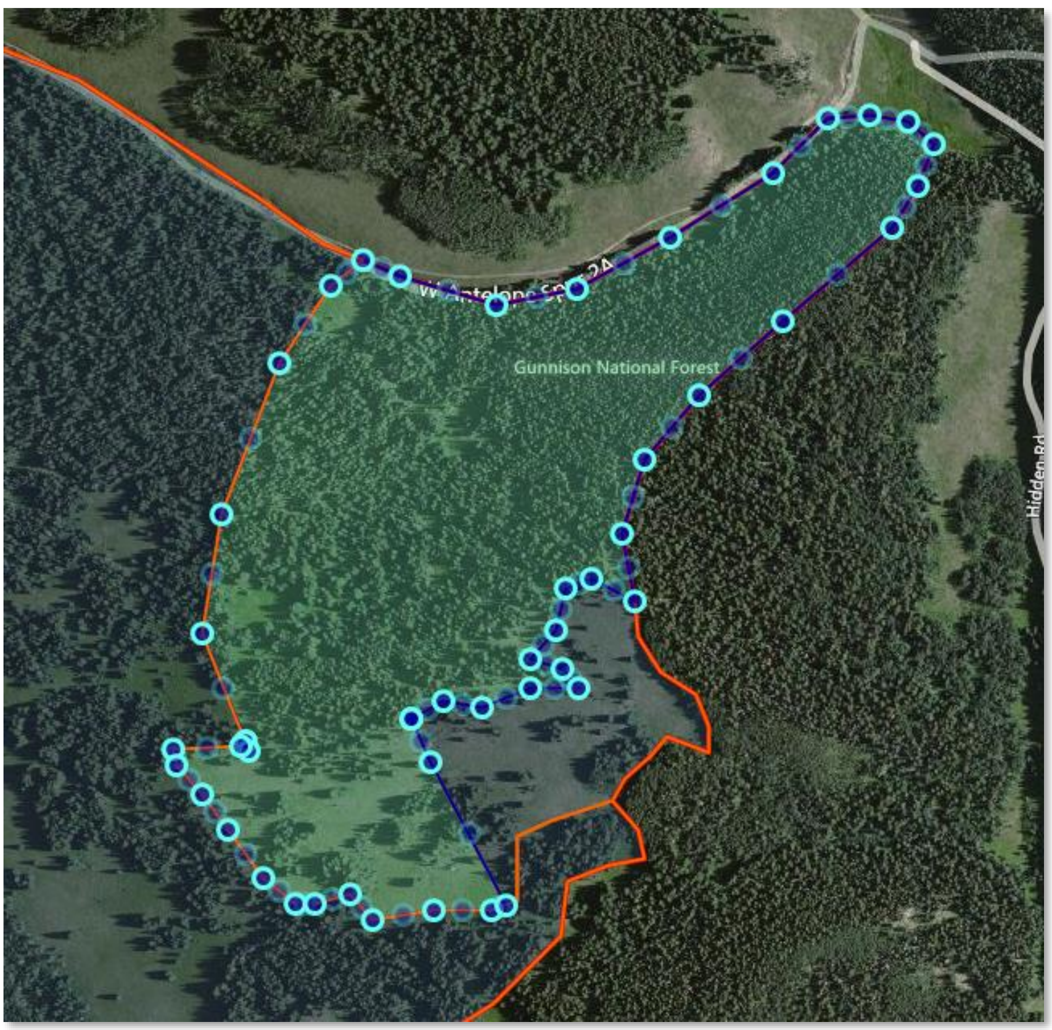
3. Now you are ready to select the stand that you want to merge with the selected stand. In the image below I have selected the stand with the red arrow pointing to it, so it will be merged with the selected stand.



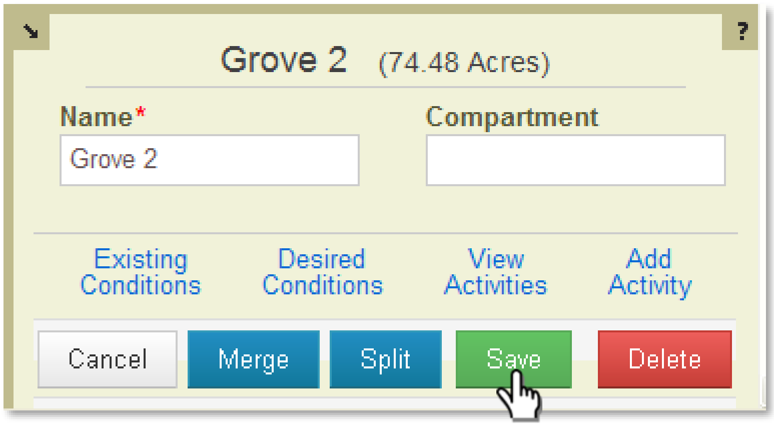
4. You will not see the stand become selected, but you will see a confirmation pop-up window. It will have the stand names that are being merged so you can confirm it is correct. Here, the stand Aspen Grove 2 is becoming a part of the stand Grove 2. Select **Yes** to complete the merge.



5. When you have confirmed the merge, you will see the two stands come together as one larger stand.



6. Click Save in the lower right window to save the new merged stand.

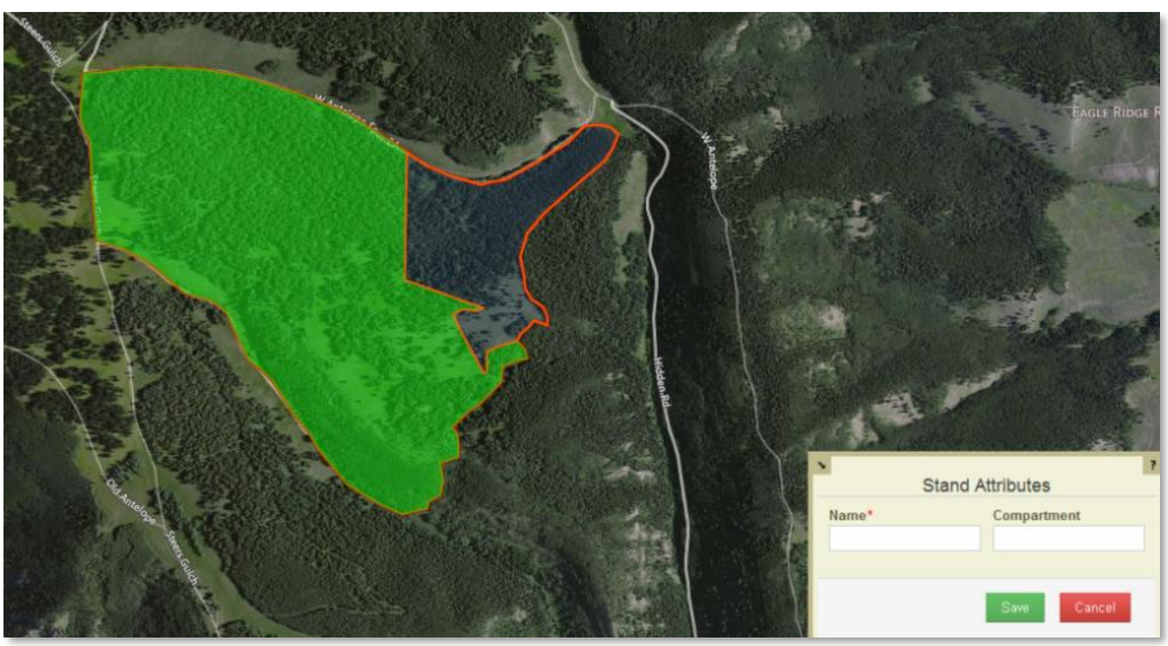


Converting the Remainder of the Property Boundary into a Stand

When you have created all the necessary stands, but you still have empty space in your property boundary that is unaccounted for you can convert the remainder. This option will take any leftover space and create a stand out of it for you.

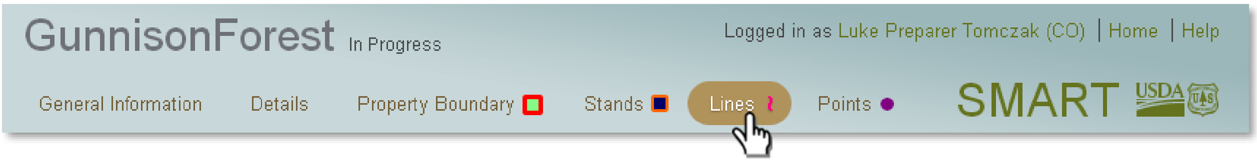
1. Click Convert Remainder in the bottom right window when you are in the Stands map. This will turn the area that has not been marked as a stand, green, and then ask you for stand information.

2. Now you can give that area a name and Save it. This helps keep all the area in the property accounted for and keeps the plan more organized.

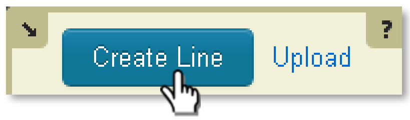


Creating Lines

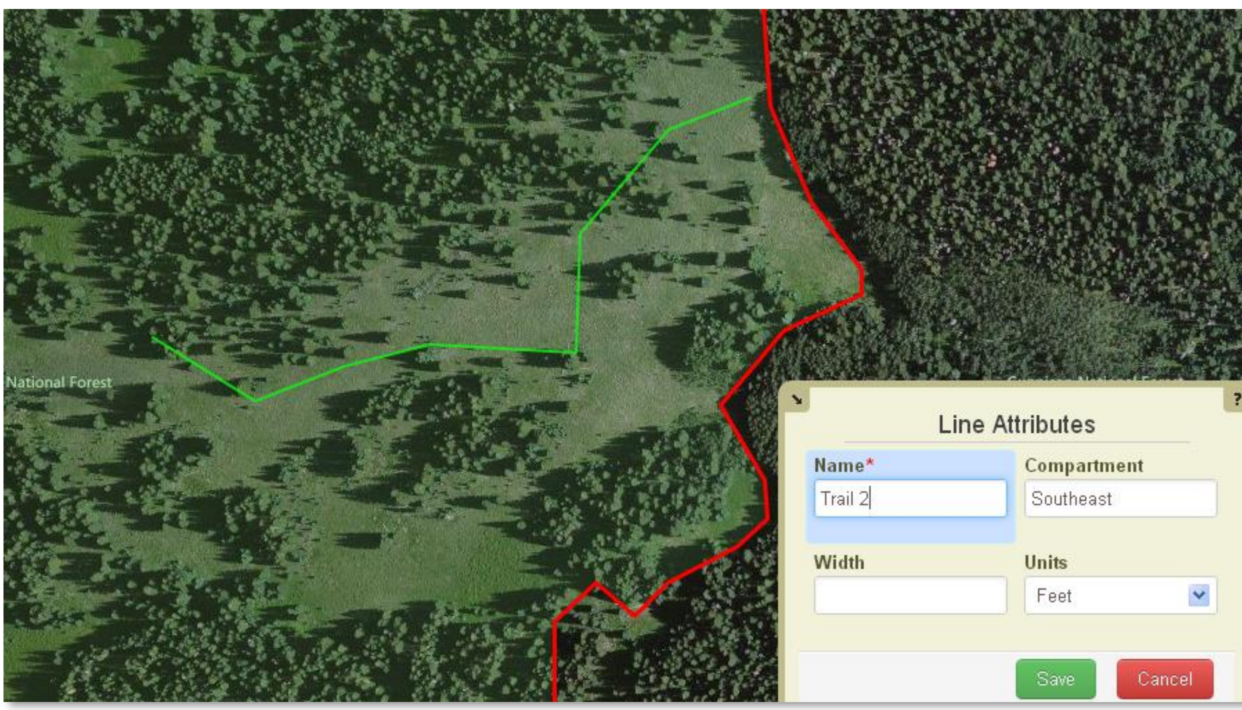
1. To start creating line features in your property boundary, first select Lines at the top of your screen.



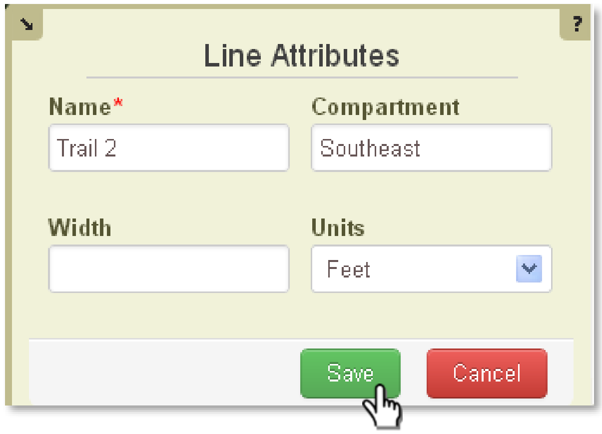
2. Next, select Create Line in the information box in the bottom right corner of your screen.



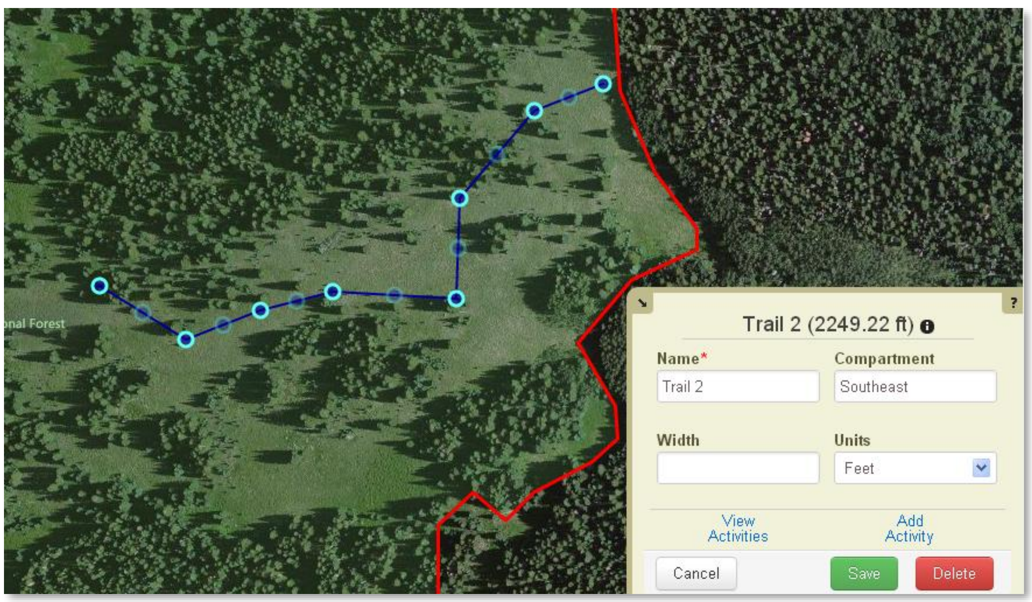
3. Once you click the Create Line button, you will see a pink circle appear around the tip of the mouse arrow. This means you are ready to start digitizing your line. It works just like digitizing stands; each click will create a vertex for the line and double click to complete the line. The line will turn from pink to green when it is complete. (see below)



4. When you complete your line, you will see a Line Attribute box appear in the bottom right corner. In this box you can name the line and add any other necessary information to it. Note: Line Name is required. Also, don't forget to select Save at this stage so you don't lose your work.

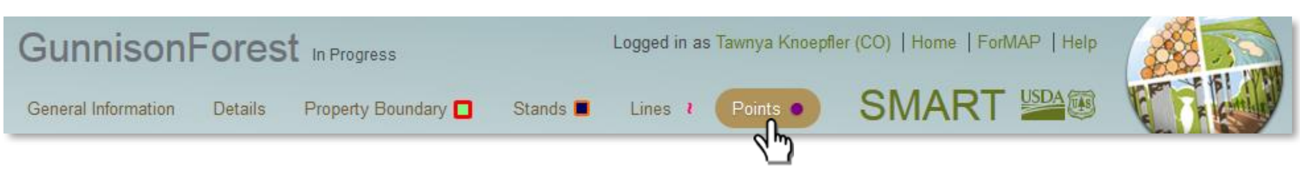


5. The line is now complete and saved. At this point you can select the line and use ***vertex editing***, ***Add Activities***, and view information about the line.



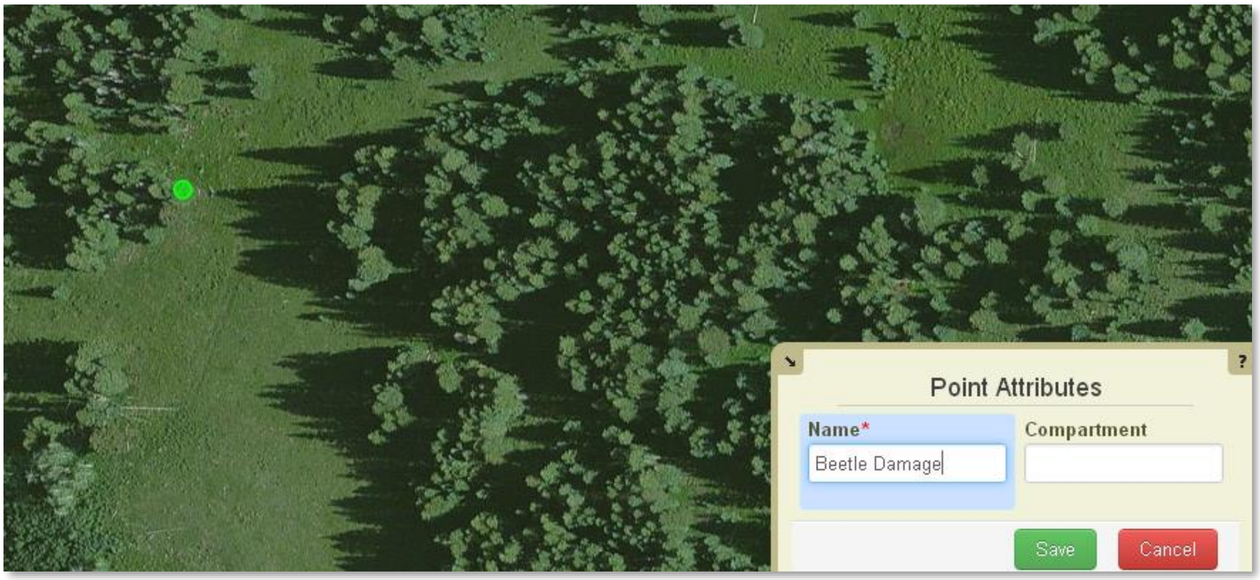
Creating Points

1. To start creating point features in your property boundary, first select points at the top of your screen.



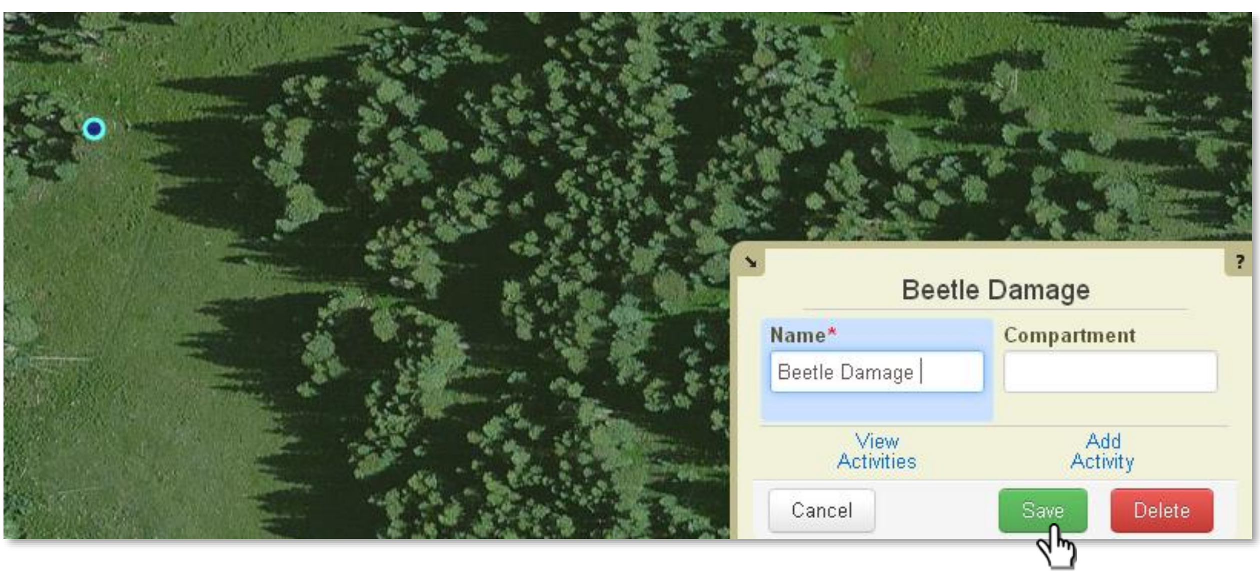
2. Next, click Create Point in the information box in the bottom right corner of your screen.

3. Once you click the Create Point button, you will see a purple circle appear around the tip of the mouse arrow. This means you are ready to start digitizing your point. One click on the map will create one point. The point will turn green when it is created on the map. (see below)



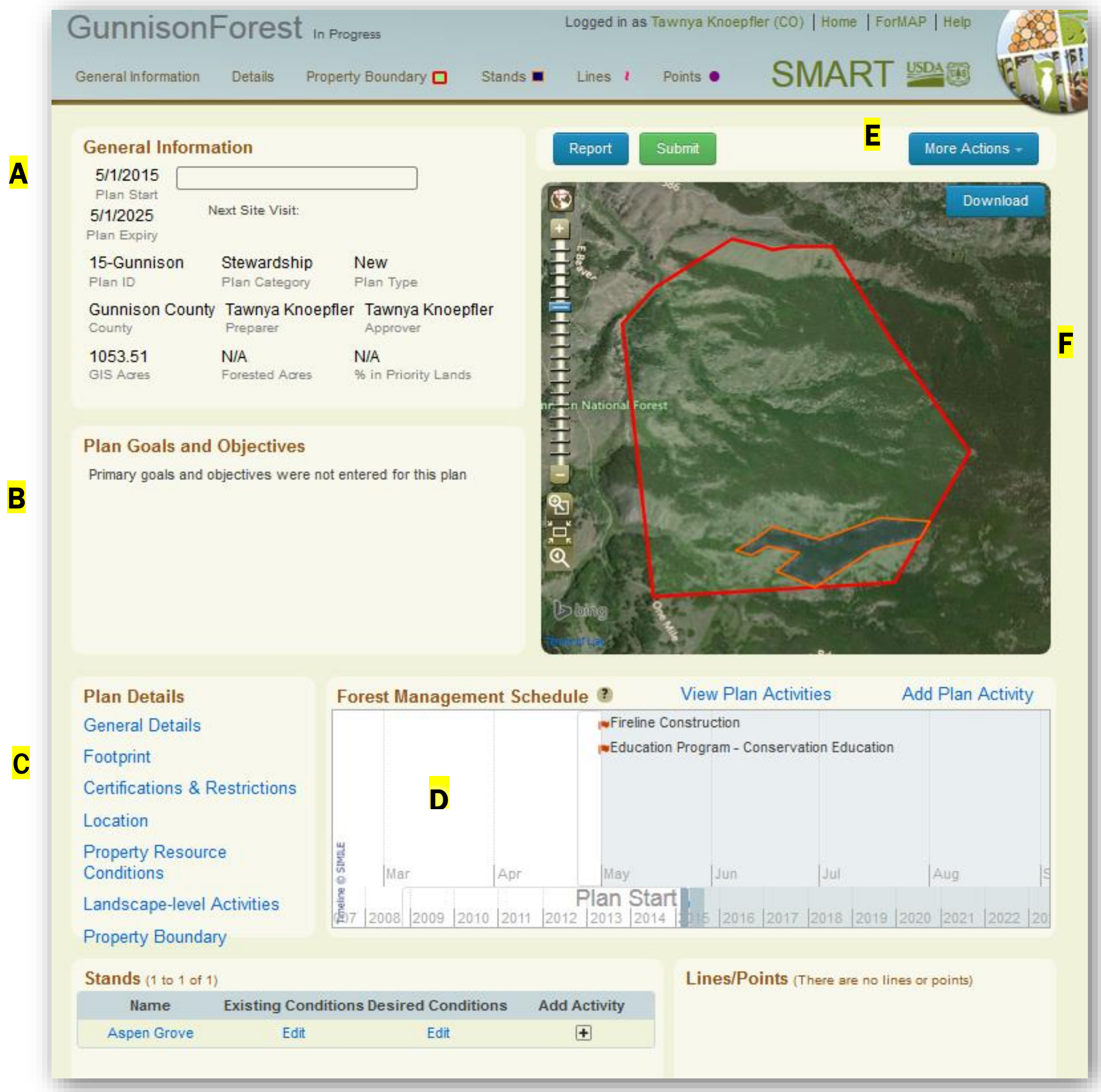
4. When you complete your point, you will see a Point Attribute box appear in the bottom right corner. In this box you can name the point and add any other necessary information to it. Note: Point Name is required. Also, don't forget to select Save at this stage so you don't lose your work.

5. The point is now complete and saved; you may select the point and ***Add Activities*** or edit the point and view information about the point.



Plan Summary Page

Once General Information is saved for a plan, a plan summary page is created. At any point in the process of creating the plan you can select the plan name at the top left of your page, which will take you to the plan summary page. This page allows you to see and access all aspects of the plan. There are several distinct sections to the plan summary page.



Plan Tabs – Located under the plan name, you may select any of the plan's editable layers (General Information, Details, Property Boundary etc.) to view and edit tabular and GIS data.

A. **General Information** – This section lists basic details about the plan.

B. **Plan Goals and Objectives** – If the Plan Goals and Objectives section was filled out when creating the plan, it will be presented in this section.

C. **Plan Details** – You may also view and edit entries by selecting the blue hyperlinks underneath Plan Details on the bottom left. The Forest Management Schedule module is another handy feature of the plan summary page. Administration

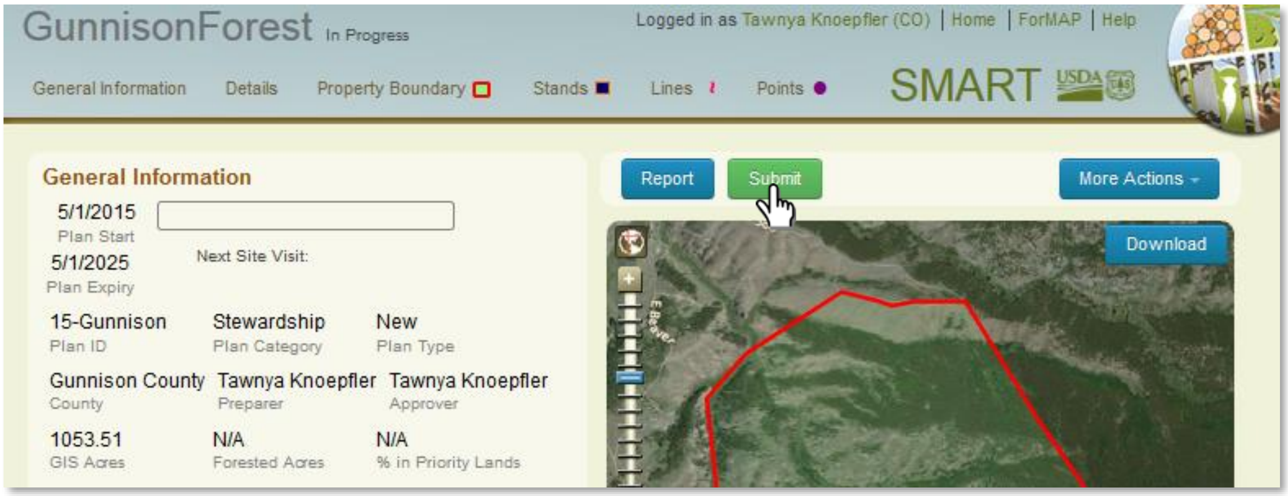
D. **Forest Management Schedule** –This feature lets you view plan and stand activities in a timeline format. You can click and scroll through the month and year timelines to see past or upcoming activities.

E. **Plan Administration Tools** – This section allows you to manage administrative aspects of the plan. If you are the plan preparer for a plan, you will see Report, Submit, and More Actions buttons.

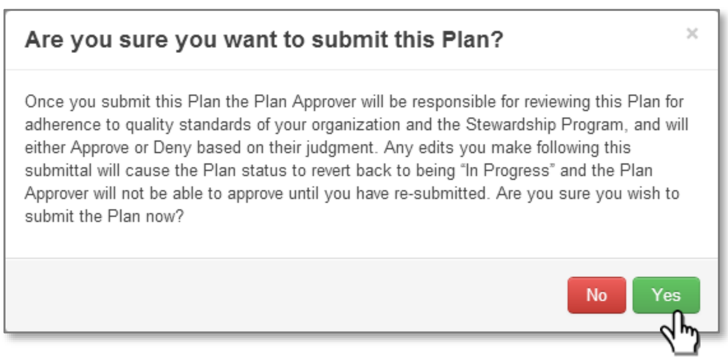
F. **Mapping Interface** – This section is interactive, without navigating away from the summary page, you may pan by clicking and holding down on the map, or use the zoom and place finder tool on the left.

Submitting a Plan

1. Once your plan is complete and you are ready to submit it for approval, navigate to the plan summary page. From the Plan Summary click the *Submit* button.



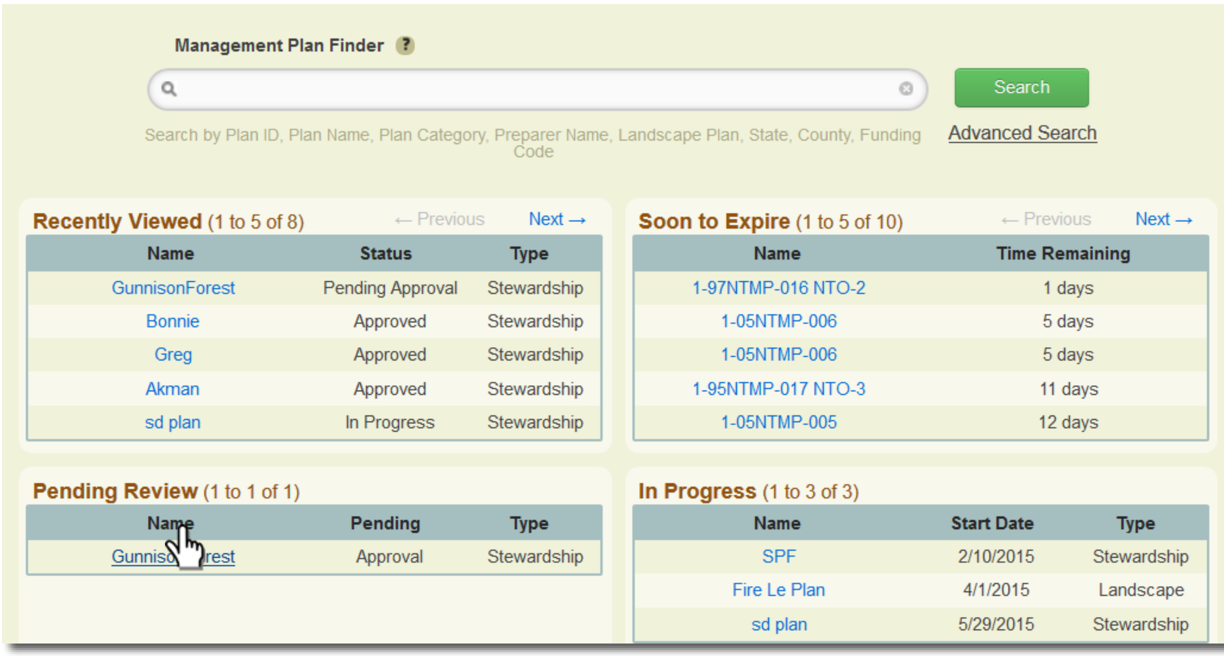
2. A window will open asking if you are sure you want to submit your plan. Click Yes to continue.



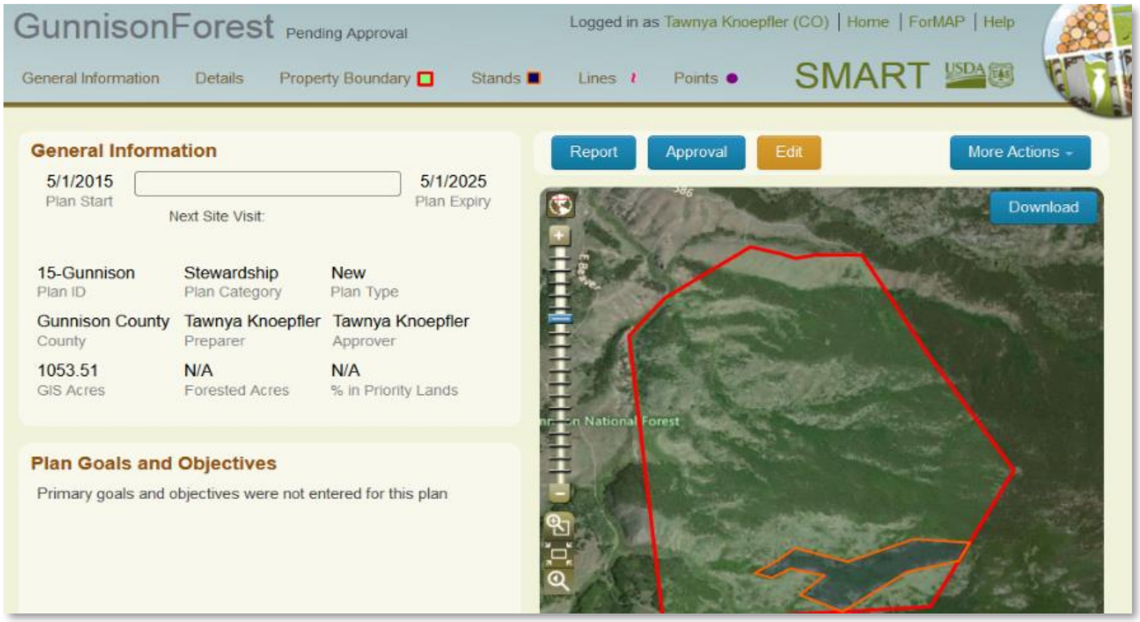
3. Now the plan has been submitted for approval to the plan approver that is associated with this plan. The approver will receive an email letting them know a plan has been submitted to them.
4. You will receive an email letting you know whether the plan has been approved or rejected once the approver acts on the plan.

Approving a Plan

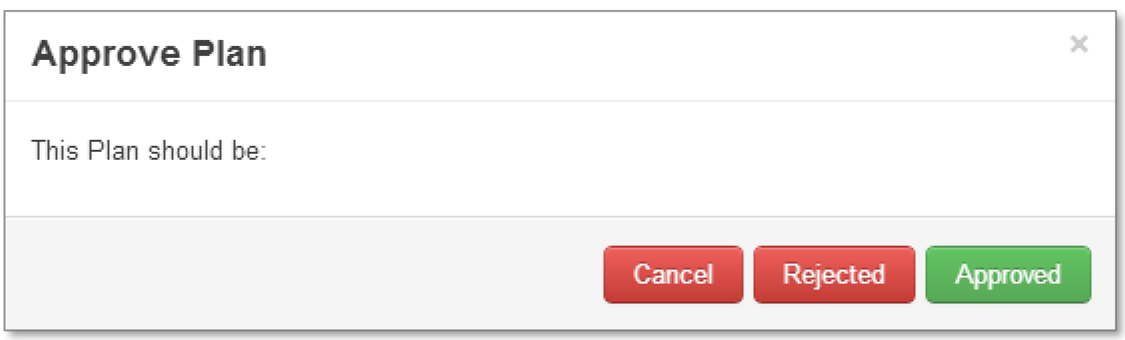
1. As a plan approver, you will have a Pending Review box on your home screen, indicating when a plan has been submitted to you. You will also receive and email notification when a plan needs your attention. To approve the plan from your home screen, select the plan name in the Pending Review box.



2. This will bring you to that plans summary page. As an approver, your plan summary page will have an Approval and Edit button above the map. Plan status is important in this process, you can find the status in the upper left hand corner next to the plan name. When a plan is first submitted to you the status will be "Pending Approval." Before a plan is submitted, its status is "In Progress." Only "In Progress" Plans can be edited.



3. Selecting the *Edit* button will allow you to open the plan back up for edits and it will change the plans status to “In Progress.” If this is done, it will need to be resubmitted after any edits are made.
4. Selecting the *Approval* button will give you the option to approve or reject the plan.



5. When Approved is selected it will approve the plan and send it to the national database for reporting. This will allow others to view the plan and will also change the plans status to “Approved,” confirming that the approval process was successful.
6. Telling SMART that the plan should be Rejected will send the plan back to the “In Progress” status and an email notification will be sent to the Plan Preparer.
7. Once you see that the plan status has changed to “Approved,” your job as an approver is complete.

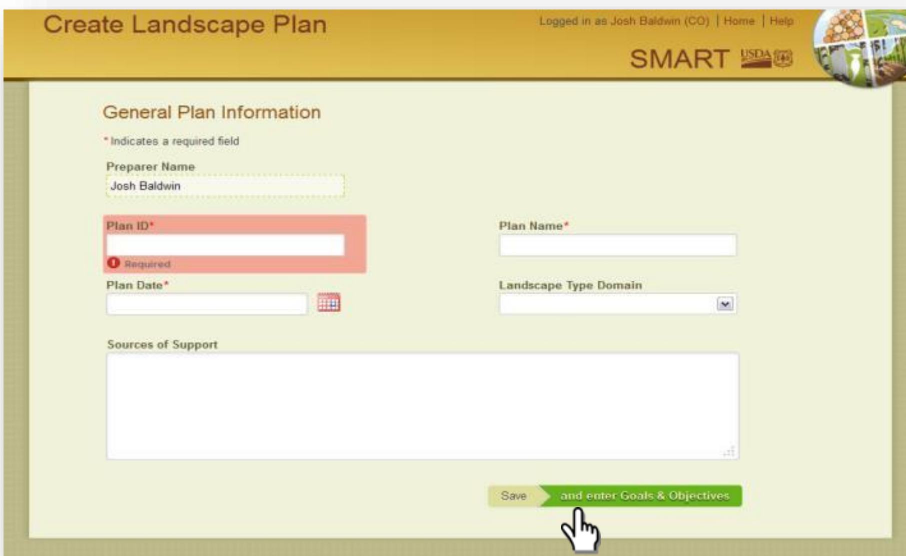
Landscape Plans

Landscape Plans are used to delineate an area of stewardship interest larger than any individual Stewardship Plan could cover. Whereas Stewardship Plans are undertaken as a formal plan for a particular property, Landscape Plans can be drawn to include multiple private and public properties. Examples include forest improvement districts, public-private collaborative projects, landowner cooperatives, and multi-agency restoration projects.

Landscape Preparers enter plans in to the database.

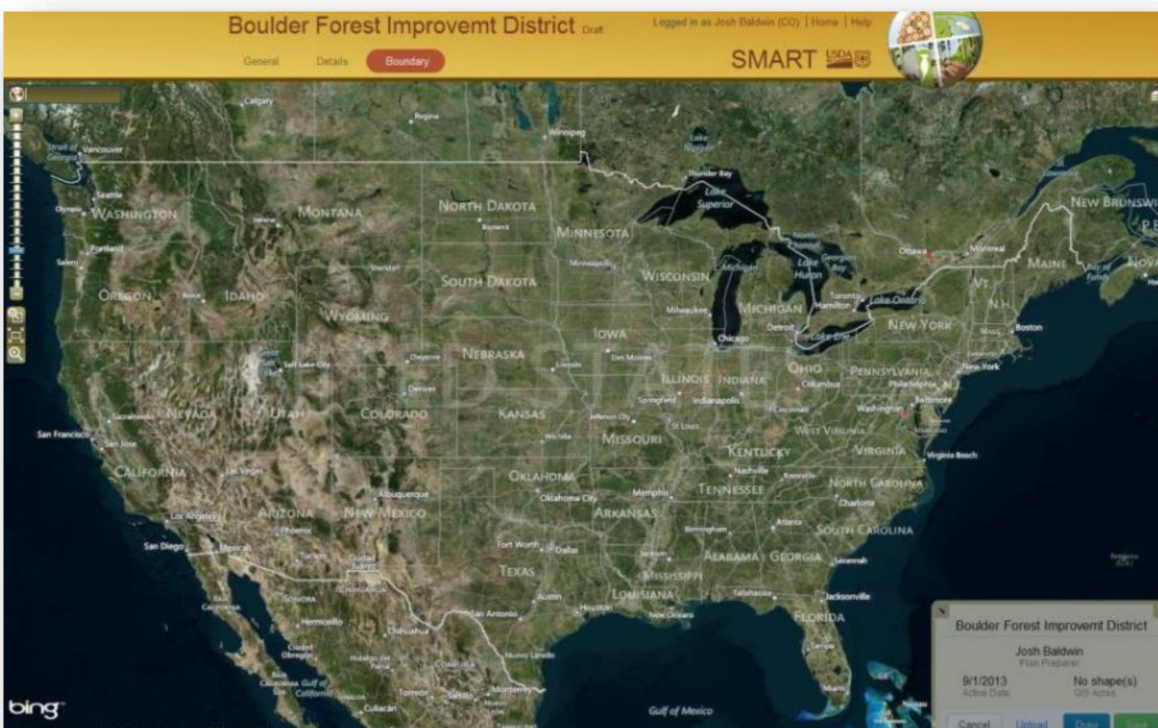
Steps to Enter a New Landscape Plan

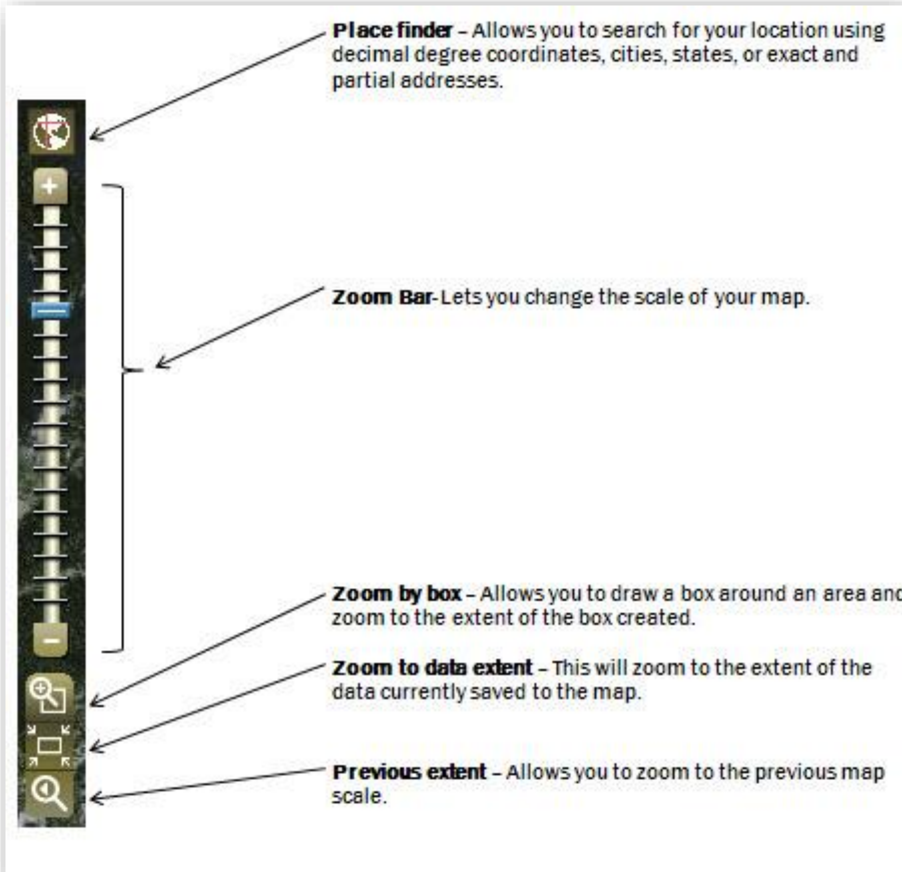
1. Click on the Create a new Landscape Plan button on your Home Page
2. Fill out the General Plan Information page (below). Required fields are noted with a red asterisk. Save this page and either click *Save* or *Save and enter Goals & Objectives.*



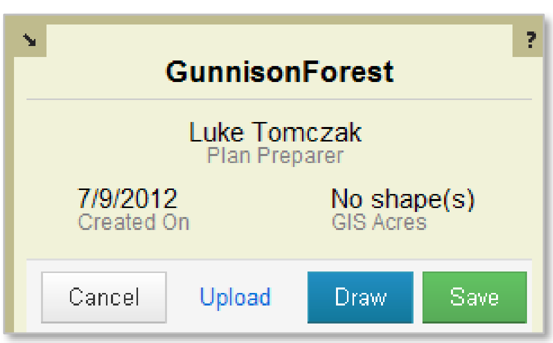
3. If you click on the *Save and enter Goals & Objectives Save and enter Goals & Objectives* button, you will be directed to the Objectives page of the Details tab (red highlighting around the Details tab). In the Details section you may enter in as much or as little information as you would like in the Objectives, Resource Conditions, Activities, and Desired Conditions sections (See Create a New Forest Stewardship Plan section in the SMART User Guide for more information on these categories).

4. You may now click on the Boundary tab at the top of the page, which will bring you to the SMART mapping interface. Use the zoom bar and place finder tools to locate the geographic location of the Landscape Plan. The two most common ways to do this are 1) typing in a town or city near the Landscape Plan into the place finder or 2) using the zoom tools – for detailed instruction on how to use the zoom features and other mapping features please see the Creating a Property Boundary section of the SMART User Guide.



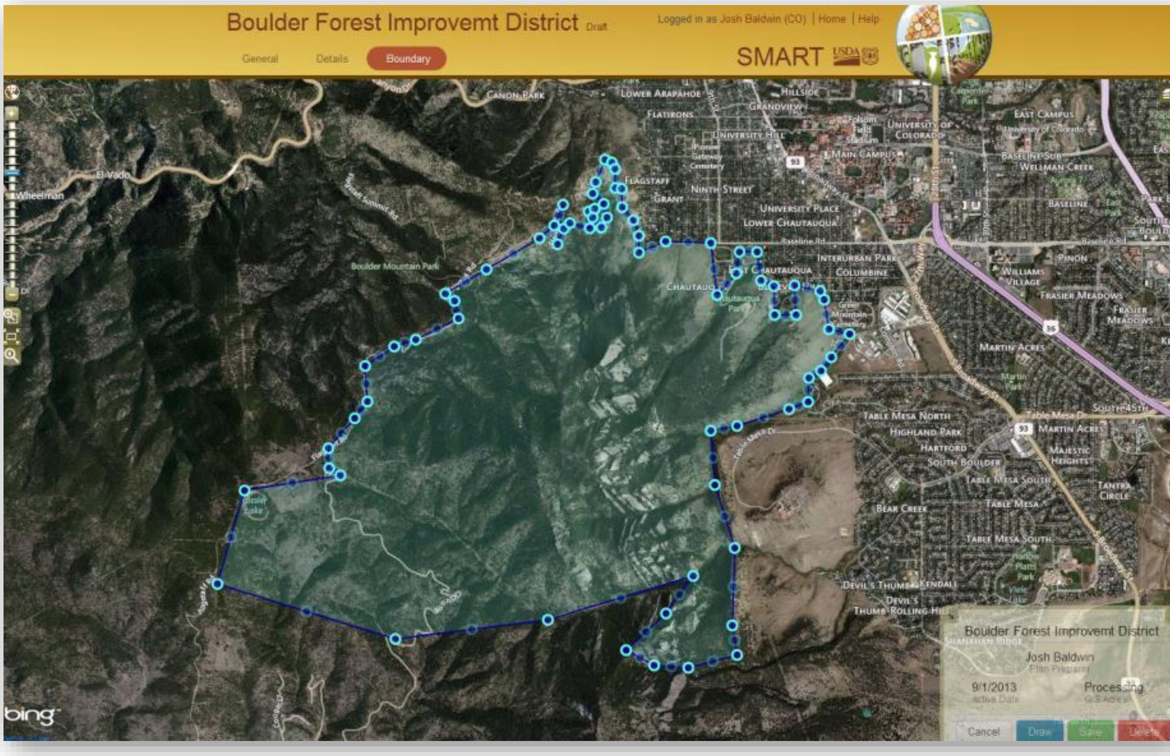


6. Once zoomed into the location of the Landscape Plan, you may now draw or upload an existing shapefile of the Landscape Plan boundary. To draw a boundary Click Draw in the bottom right-hand corner.
7. Click Draw in the box in the bottom right-hand corner. You will then see a red circle become connected to the end of your cursor. The center of this circle is where points will be created as you digitize your Landscape Plan boundary.



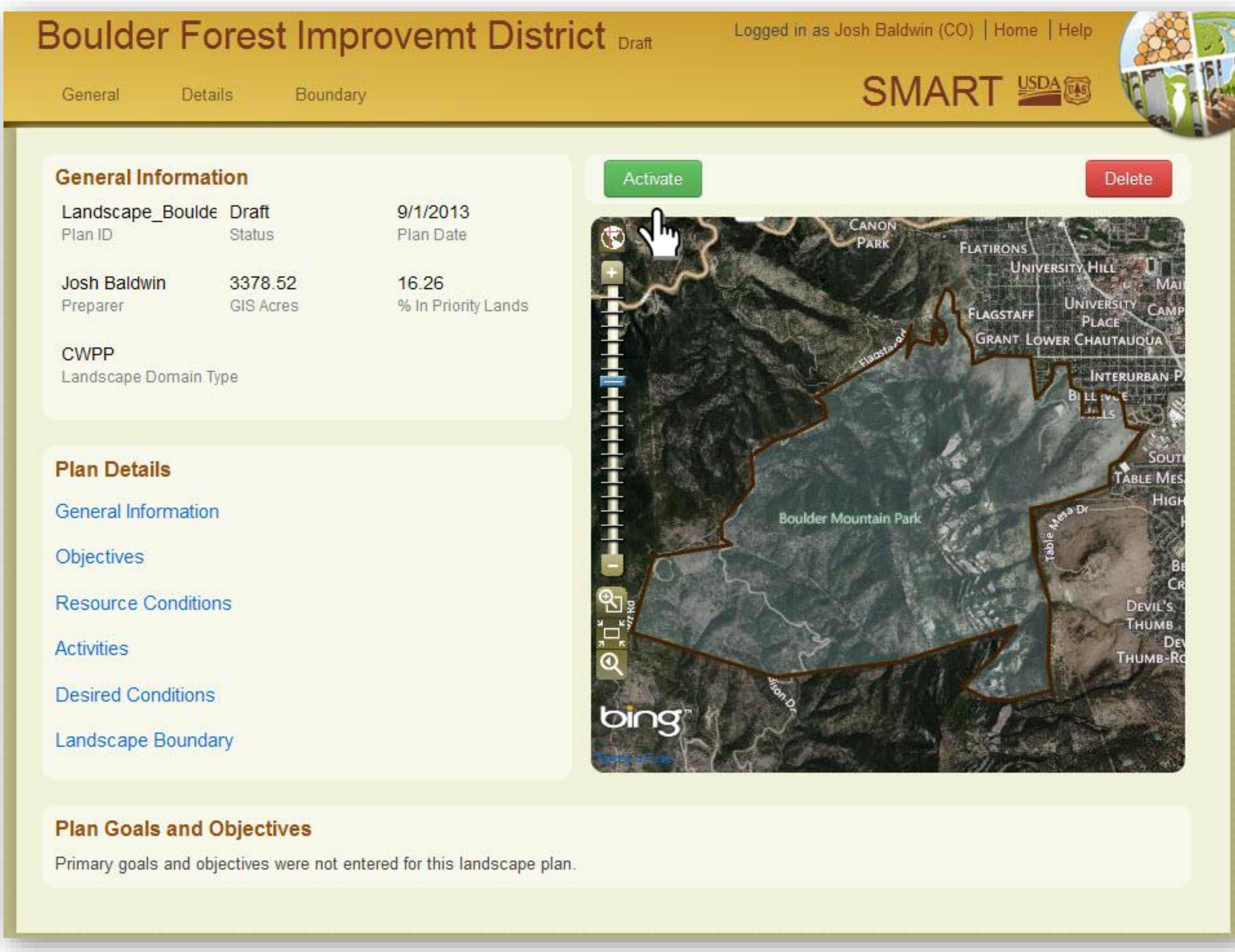
8. Zoom to a comfortable scale and begin clicking along the boundary. SMART allows you to pan as you go without losing what you have already digitized by clicking, holding down the mouse, and dragging the map. Once you have digitized the complete boundary, double click to finish.
9. Click SAVE to save the Landscape Plan boundary, a box will pop-up in the upper

right-hand corner letting you know your plan was saved successfully. After saving the Landscape Plan, if needed, you can edit the Plan by clicking and dragging the blue vertices. An example of a saved Landscape Plan undergoing edits is below.



In order to activate the Landscape Plan you need to go to the Plan Summary page by clicking on the Plan Name in the upper left hand corner.

10. Click on the green Activate button above the mapping interface. Your Landscape Plan is now active and viewable by the SMART user community. Once activated you may make edits and even delete the Plan if needed at any time.



Congratulations -- you have completed your first SMART Landscape Plan.

Projects

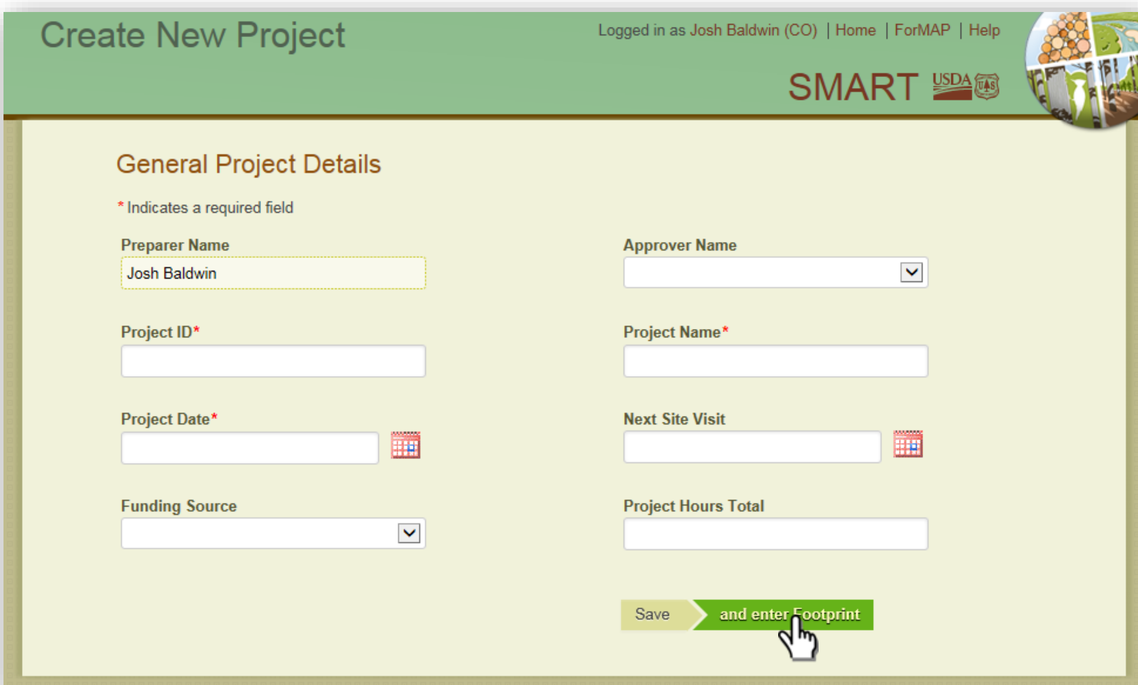
Projects are used by states to delineate a project of stewardship or general forestry interest that does not meet the guidelines of a Forest Stewardship Plan. Whereas Forest Stewardship Plans act as an official record for managing a particular landowner's property, SMART Projects are used to document various types of state projects. Projects are included in SMART to give state programs the flexibility they need to report on non-Forest Stewardship aspects of their program. Examples include recording a landowner assist or educational workshop, creating field sampling designs, and reporting on non-Stewardship activity practices.

The main feature that distinguishes Projects from Management Plans and Landscape Plans is that the GIS features associated with the project can be polygons, points, or lines.

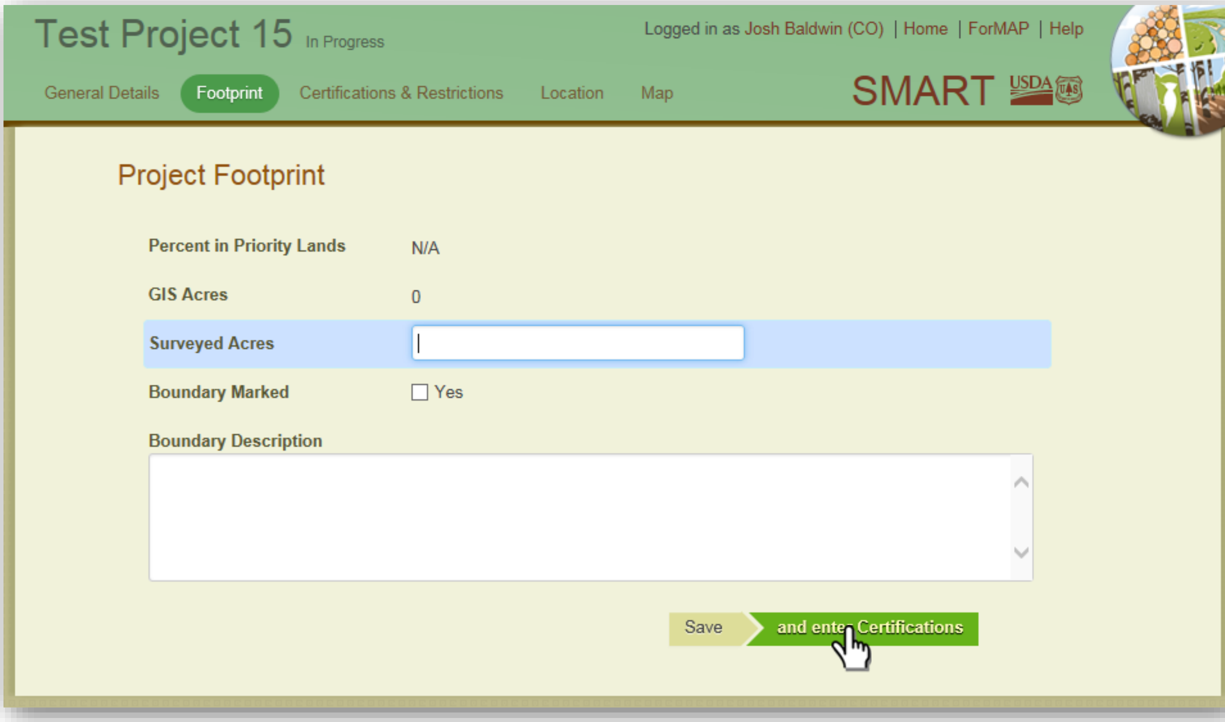
Project Preparers enter projects into the SMART database.

Steps to Enter a New Project

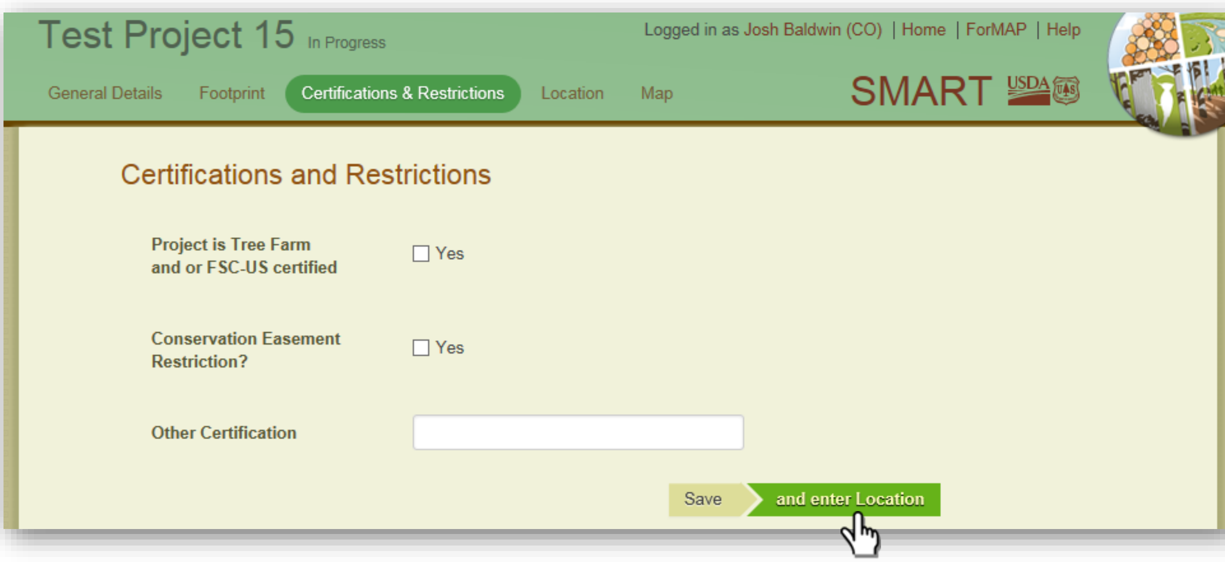
1. Click on the Create a new Project button on your Home Page. Fill out the General Project Details. Required fields are noted with a red asterisk. Although Approver Name is not required to move onto the next step, an approver will have to be chosen in order to submit the project. Save this page and either *click Save or Save and enter Footprint*.



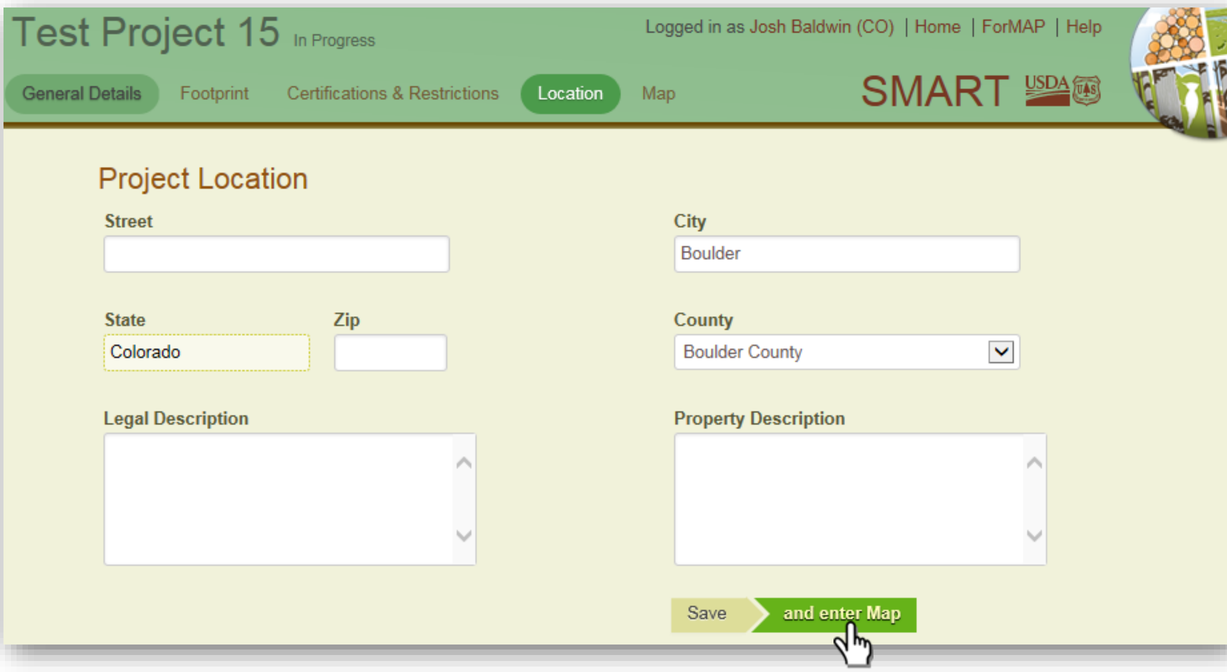
2. Following the General Details page is the Footprint page. You may write in a quantity for surveyed acres; filling in this field will overwrite the GIS acres that are calculated automatically if a polygon is entered. The Boundary Marked checkbox and Boundary Description field is not required but may be filled out if needed. *Click Save or Save and enter Certifications.*



3. If applicable, fill in the Certifications and Restrictions page and *click Save or Save and enter Location.*

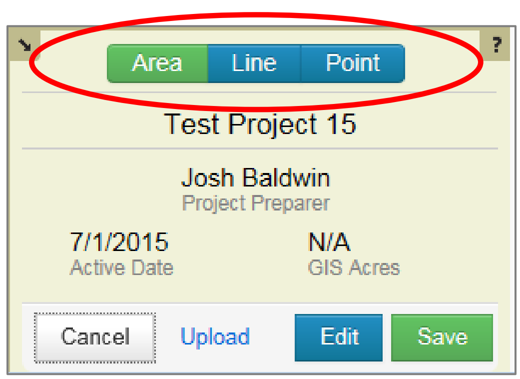


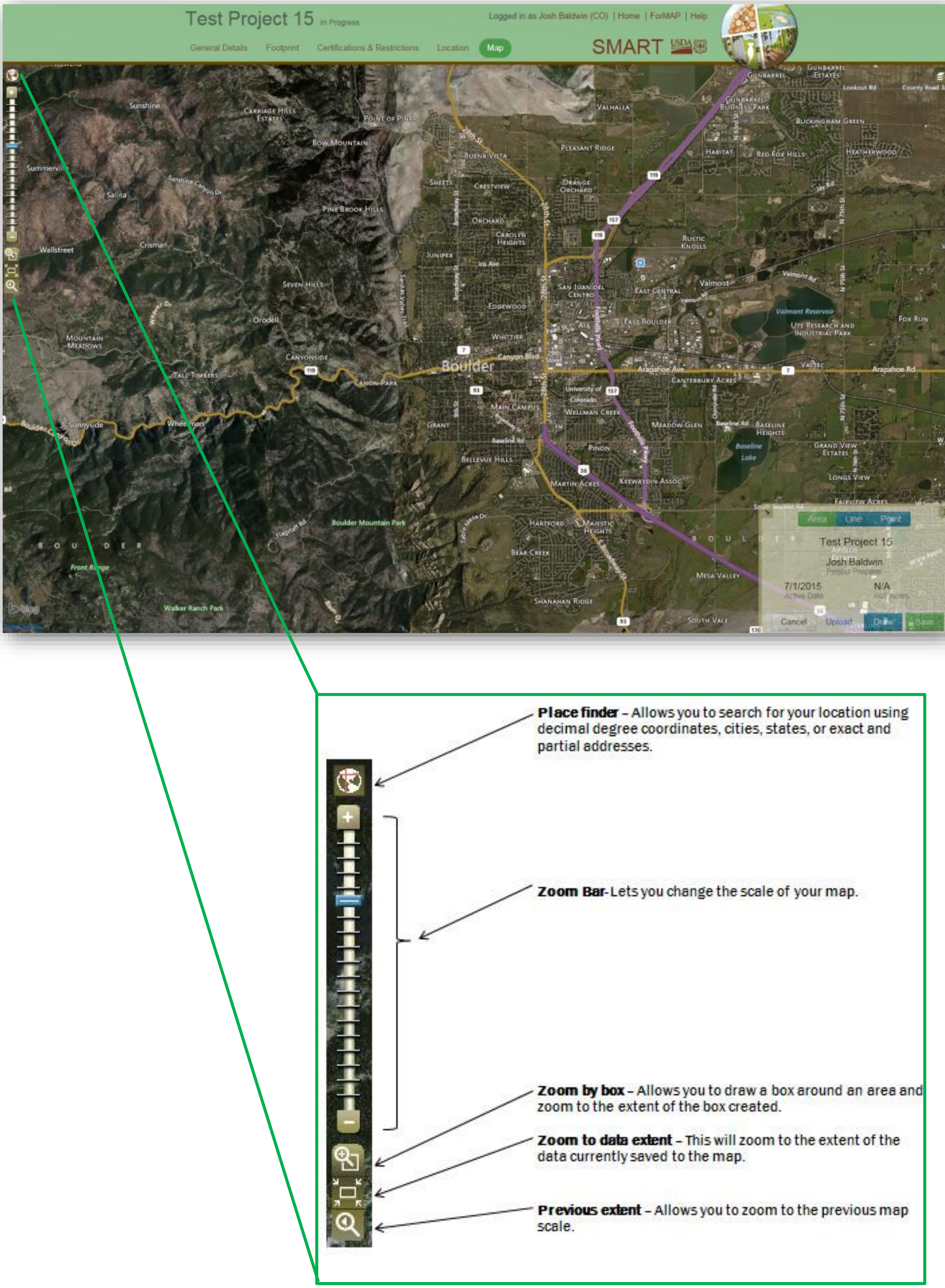
4. Although there are no required fields on the Location page, you may enter the Legal and Property description here. If a street address, city, or county is entered, the mapping interface will zoom to the project's specific geographic location. Click *Save* or *Save and enter Map*.



5. The final stage in creating a project is mapping or uploading a GIS feature. The zoom bar and place finder are found in the upper-left of the mapping interface (next page). Use these tools to locate the geographic location of the Project. For detailed instruction on how to use the zoom features and other mapping features please see the Creating a Property Boundary section of the SMART User Guide.

   Once zoomed to the location of the Project, you may draw or upload an area, line, or point(s). Hover over the box in the bottom-right hand corner, and it will become visible. Click on *Area*, *Line*, or *Point* – depending on what kind of feature the project requires – and draw in (or upload with the ShapeUp tool) the feature. Hit *Save* to commit the feature to your project.




Test Project 15 In Progress
Logged in as Josh Baldwin (CO) | Home | ForMAP | Help
General Details
Footprint
Certifications & Restrictions
Location
Map
SMART
Boulder
Area
Line
Point
Test Project 15
Josh Baldwin
7/1/2015
N/A
Cancel
Upload
Draw
Save
Place finder – Allows you to search for your location using decimal degree coordinates, cities, states, or exact and partial addresses.
Zoom Bar- Lets you change the scale of your map.
Zoom by box – Allows you to draw a box around an area and zoom to the extent of the box created.
Zoom to data extent – This will zoom to the extent of the data currently saved to the map.
Previous extent – Allows you to zoom to the previous map scale.

Area

A single or multi-part polygon may be drawn in or uploaded. Please see the *Creating a Property Boundary* section for detailed information.

Line

A single line or multiple lines may be drawn in or uploaded. Left-click on the imagery to start drawing in a line; double-click to end the line.

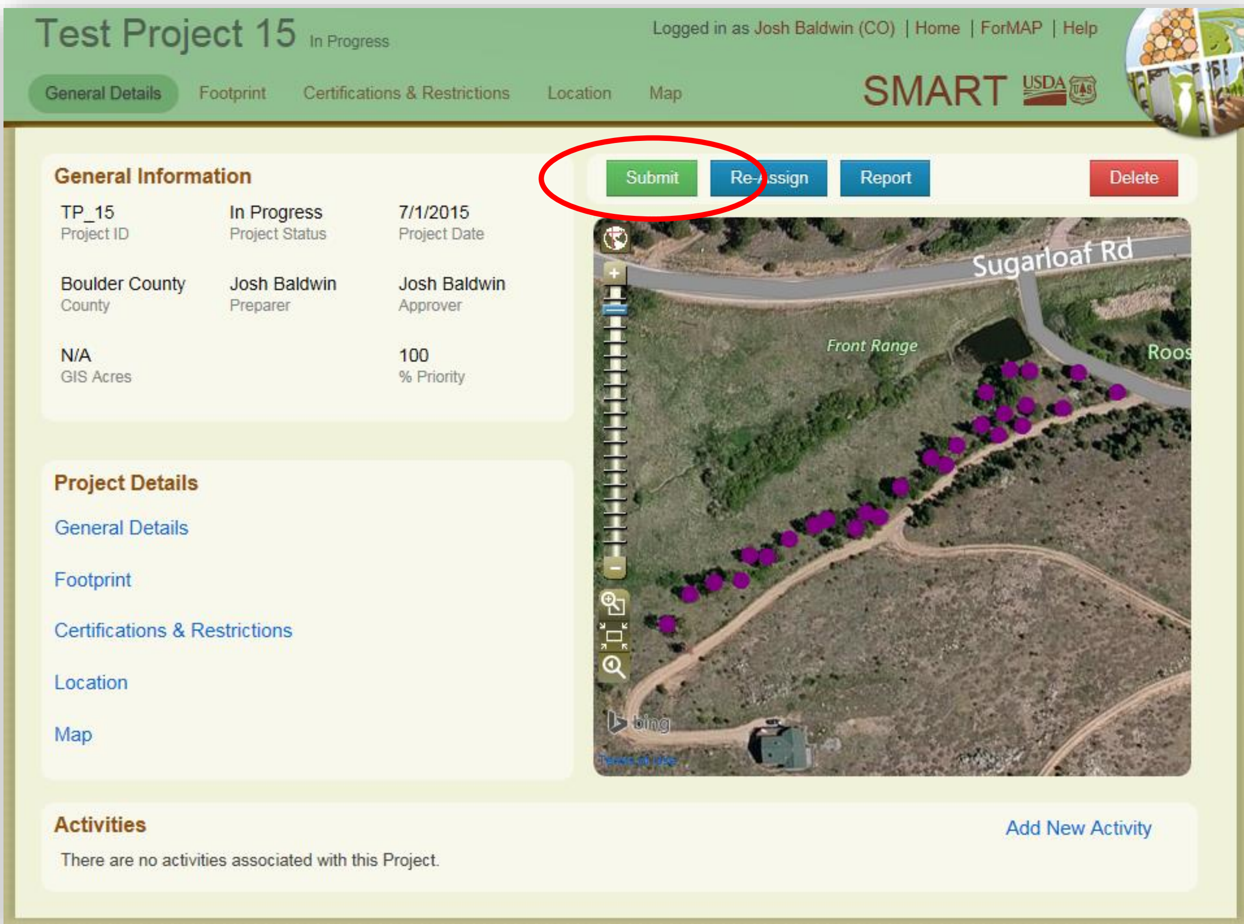
Point

A single point or multiple points may be drawn in or uploaded. Left-click on the imagery to place a point.

6. After adding a feature to your project, you may then add an activity. Before submitting the project to the SMART database, at least one activity will need to be

added to the project. Activities can be added either from the mapping box or from the Project Summary Page. Please see the *Adding New Activities* section above for guidance.

7. After all necessary information has been added to the project, the final step is to submit it to the Project Approver for approval. This is done from the Project Summary page. From here you can also re-assign the project to another Project Preparer in your state, download a word document of the project, or delete the project. You can navigate to any part of the project either by clicking on the tabs underneath the project title or clicking the blue hyperlinks under Project Details.



Congratulations, you have completed your first SMART Project!

State Administrator Responsibilities

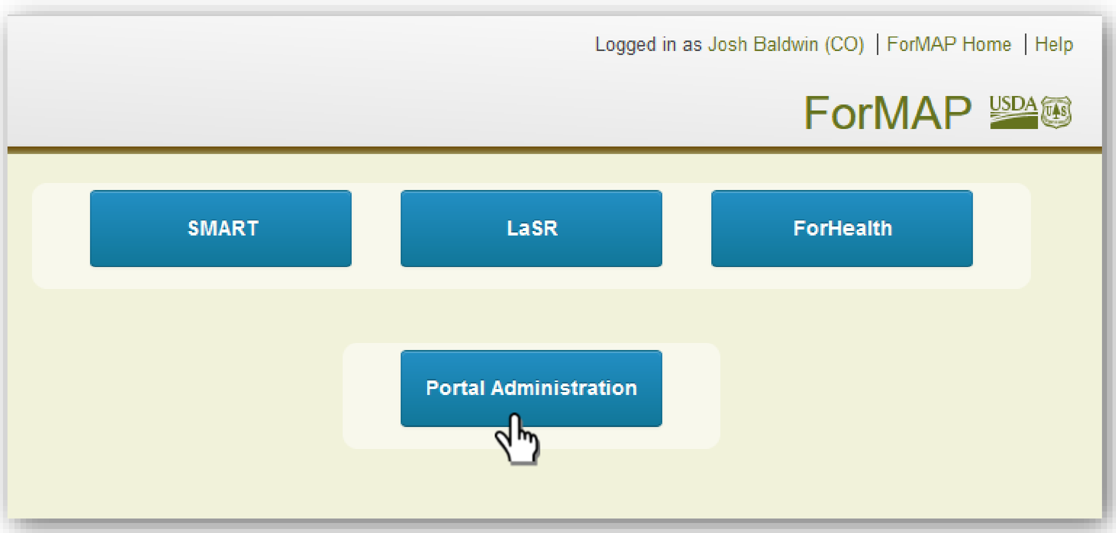
Managing Users

Within SMART, State Administrators can manage state user accounts, download User Reports, export a statewide geodatabase, edit state funding codes, enter landowner accomplishments, fulfill plan implementation monitoring duties, and manage duplicate plans.

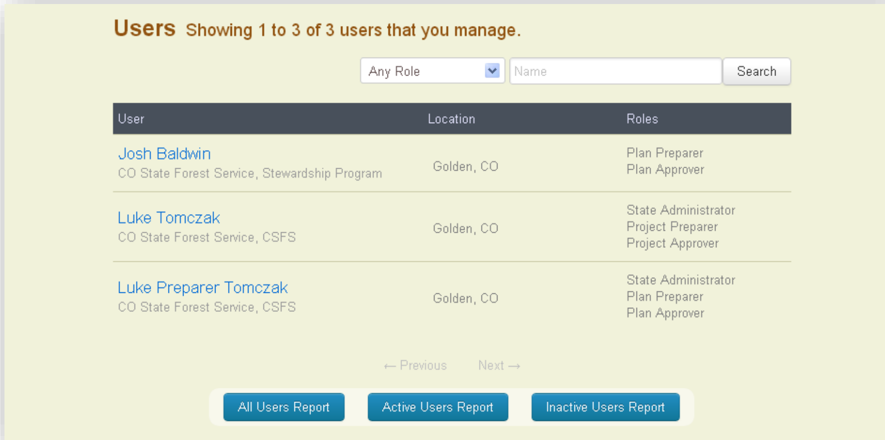
The Manage Users page allows State Administrators to search for users by role, open and edit user information pages, and download user reports. Important note: one of the primary responsibilities of SMART State Administrators is to approve incoming account requests. When a user applies for a new account, all State Administrators in the respective state receive an email with the request. It is incumbent upon state staff to approve or reject any new account requests. ForMAP National Administrators receive account requests as well, and can approve/reject incoming requests if needed.

To Manage Users:

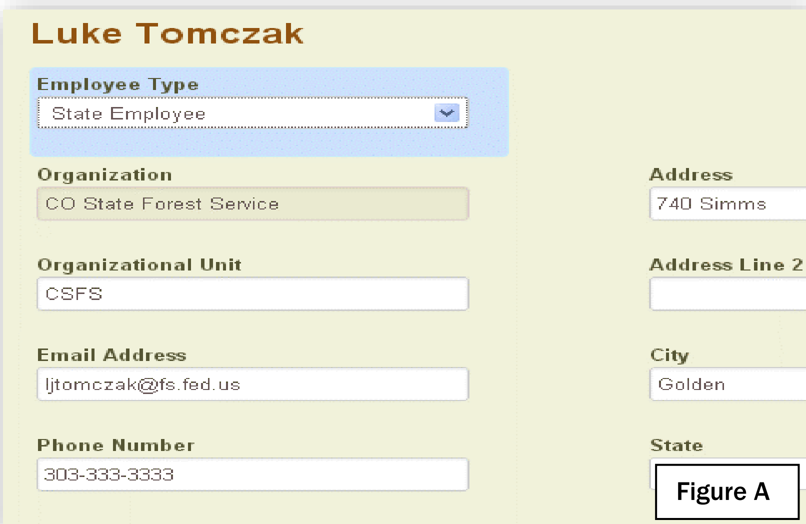
1. From your State Administrator home page select the **Portal Administration** button.

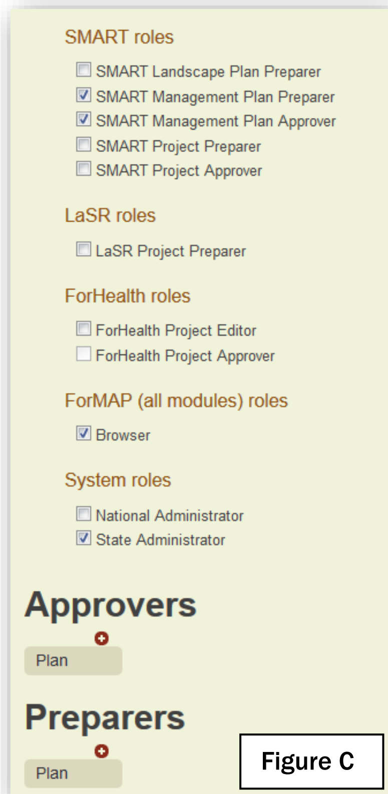


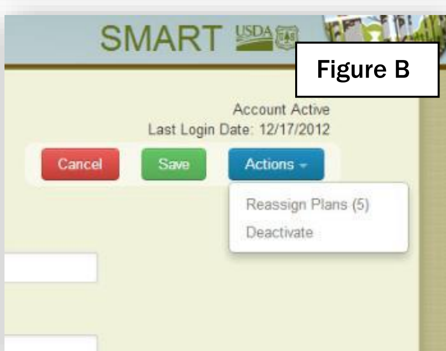
2. This will bring you to your state's Users page. From here you can search users by role and by name (first name, last name, and any combination of letters). To manage the user, click on the User name.



3. On the User's page, State Administrators can edit personal information (Figure A); reassign plans and deactivate an account by clicking the Actions button (Figure B); assign plan approvers/preparers and change their user role(s) (Figure C). Note: for a Preparer's plans to be approved and submitted they must have at least one approver listed on their account. As user account requests come in, State Administrators should set the new user's preparer(s) and approver(s). States are free to have plan preparers be their own plan approvers.





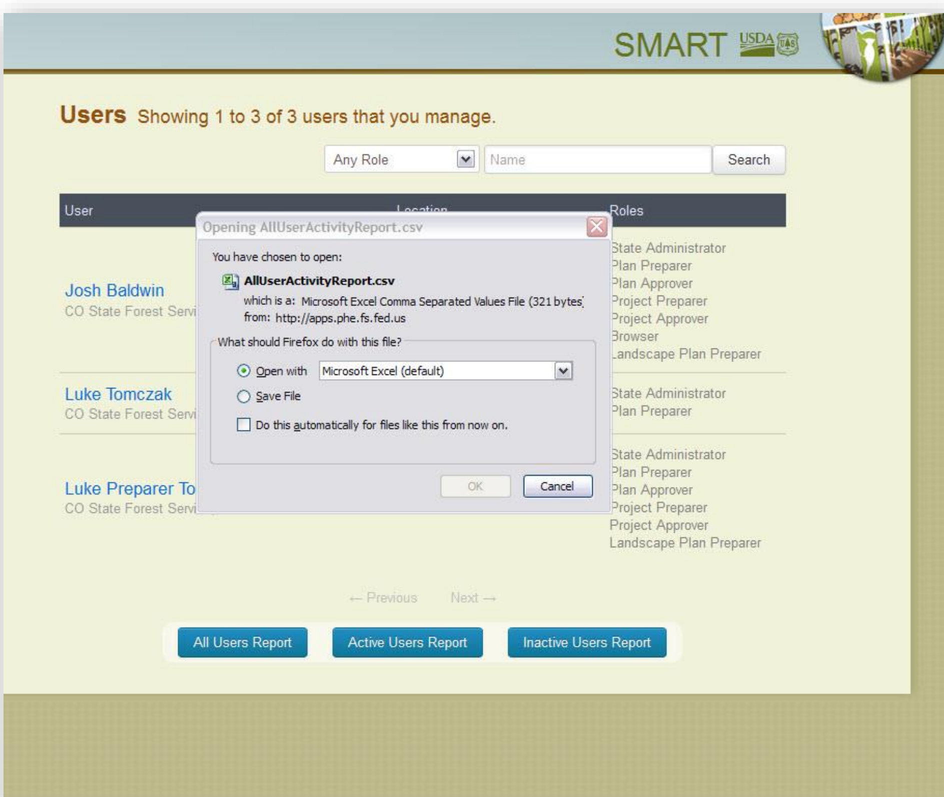


4. Be sure to click the **Save button** before leaving the page to keep any changes you have made to the user's account.

   Users, including State Administrators, do not have database permissions to manage their own accounts. If you'd like to add (or take away) a role, you will need to contact a ForMAP National Administrator by clicking on the Request Authorized Changes button on your own user page (image below).

To Download User Reports:

5. From the Users page choose one of the three buttons – **All Users Report**, **Active Users Report**, **Inactive Users Report** – from the bottom of the page (See below). Each User Report will generate a .CSV (Comma-Separated Values) text file which may be opened in Microsoft Excel or other database software. The fields included in the downloaded .CSV file are: User Last Name, User First Name, Organization Name, Organization State, Last Login Date, Deactivation Date, and Status (active/inactive).



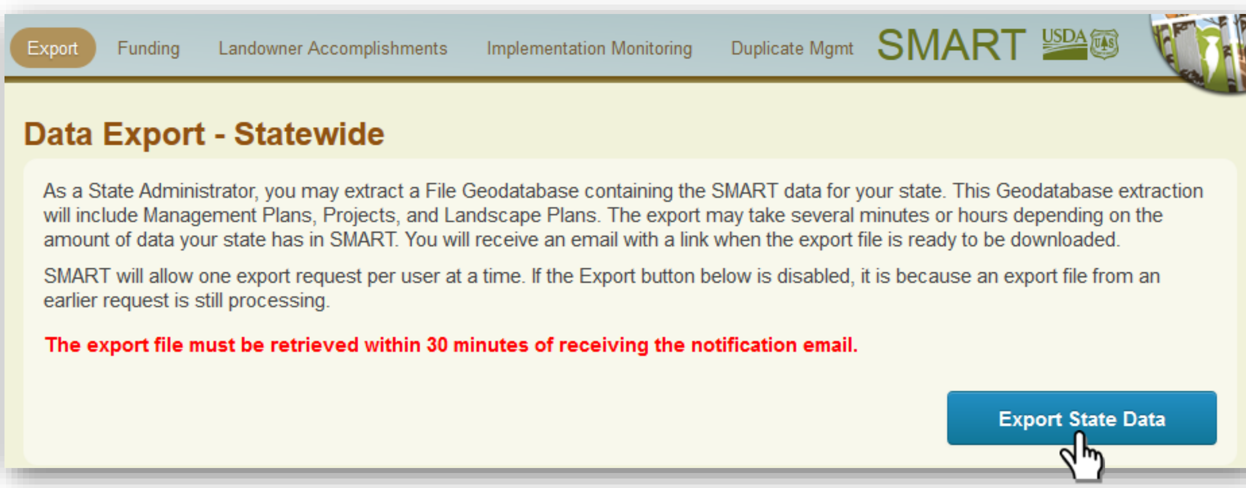
Statewide Geodatabase Export

State Administrators can extract a copy of their state's SMART geodatabase (GDB). As of Version 5, the GDB includes Management Plans, as well as Projects and Landscape Plans. Please see the Help Desk website, *www.formap.info* for tips on working with SMART data in ESRI's ArcMap software.

To Export a Database:

1. From your State Administrator home page in SMART select the **Administration** button.

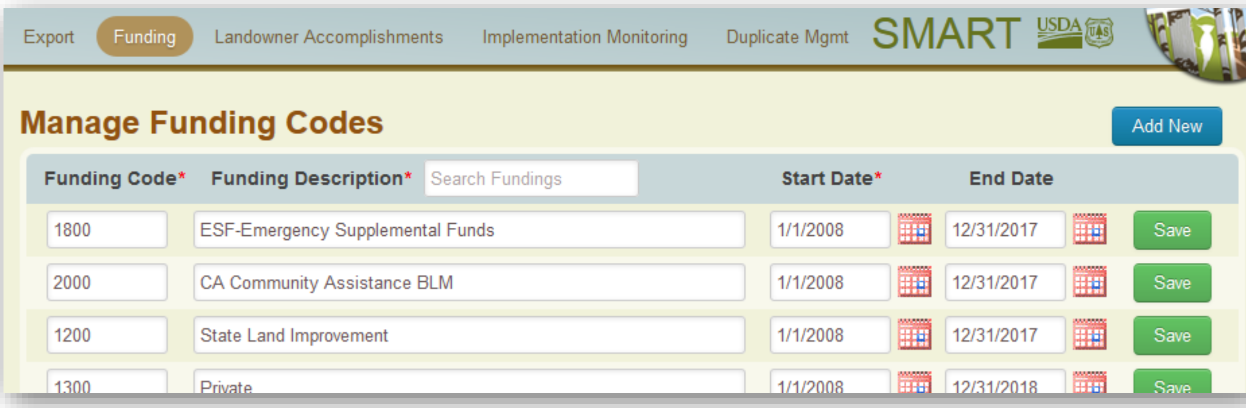
In the Administration module, make sure you are on the **Export** page. You will see the Data Export page with instruction on how the process will work. Click the **Export State Data** button.



2. The length of time for the export to complete depends on how many plans are being extracted. A normal export will take 10-20 minutes. When it is finished SMART will send you an email. You can follow the link in your email to retrieve your states geodatabase.

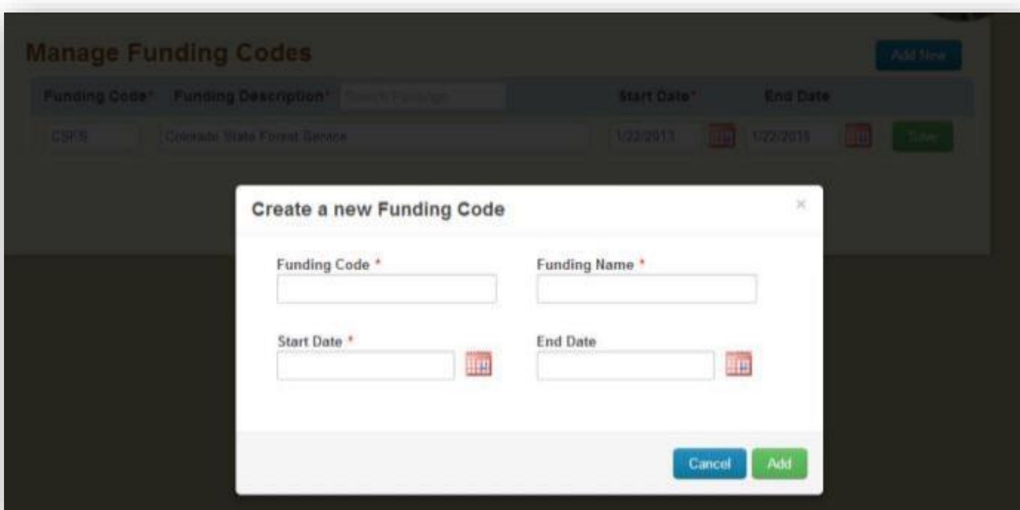
Funding Codes

The funding page can be found by accessing the Administration portal and clicking on the **Funding** tab. On this page you can edit existing funding codes, add new funding codes, and download funding data (see below). Text within the fields is editable, as are the start and end date. The end date option acts as a sunset device whereby once the date expires, the funding code is no longer available as a funding code choice for Plans created after the date. Even if a funding code has sunset, it will still be listed on all Plans that were tagged with the code.



From this page you may also create new funding codes (see below). After clicking on the Add New button, the screen darkens and a Create new Funding Code window appears.

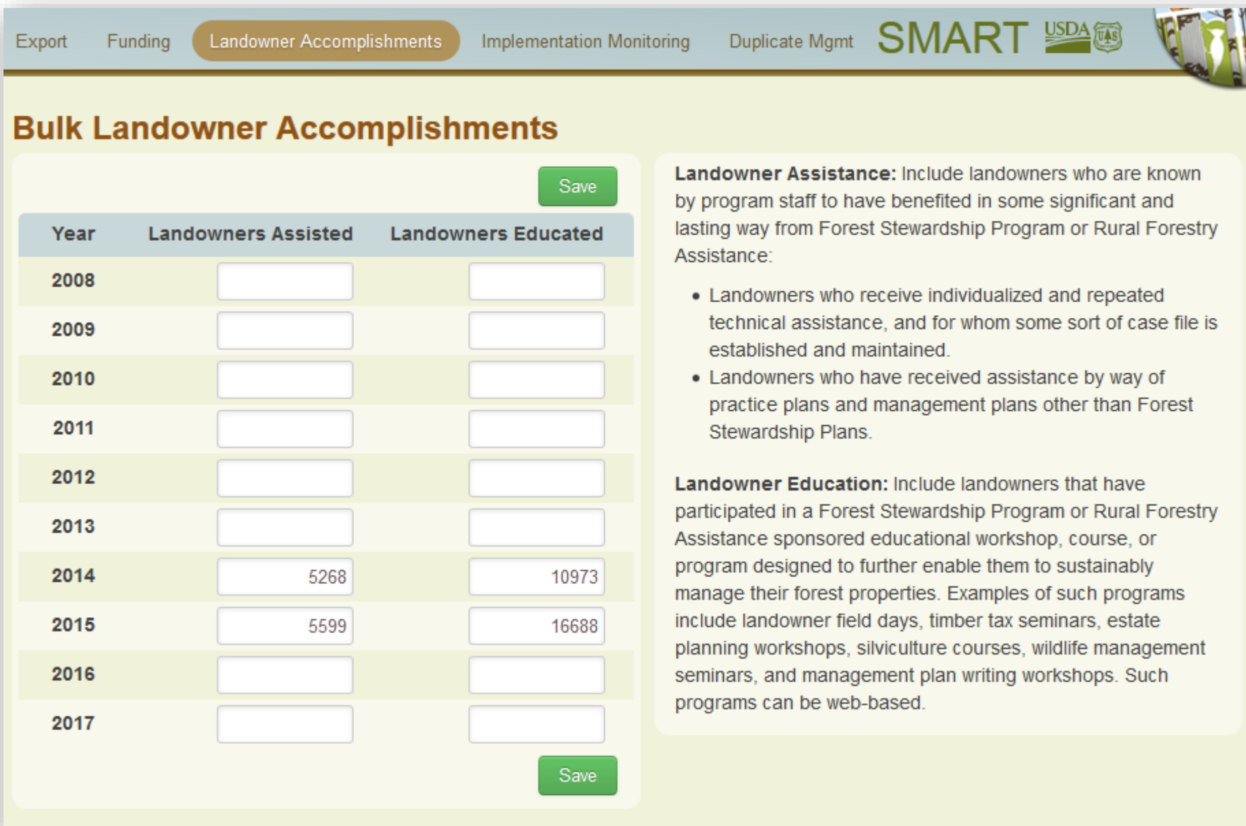
Fill out the required fields and hit the **Add** button. Once new codes are added to SMART they are then available for use - while creating or editing a Management Plan or Project.



Landowner Accomplishments

Landowner assistance can be reported within SMART from the Landowner Accomplishments portal. Reporting guidelines on Landowner Assistance and Landowner Education is explained in the right-hand window (see below).

Upon opening the Bulk Landowner Accomplishments tool you will see reporting year fields where numbers may be entered. After you are done entering Landowners Assisted and Educated totals, hit the Save button to save the information into the SMART database.

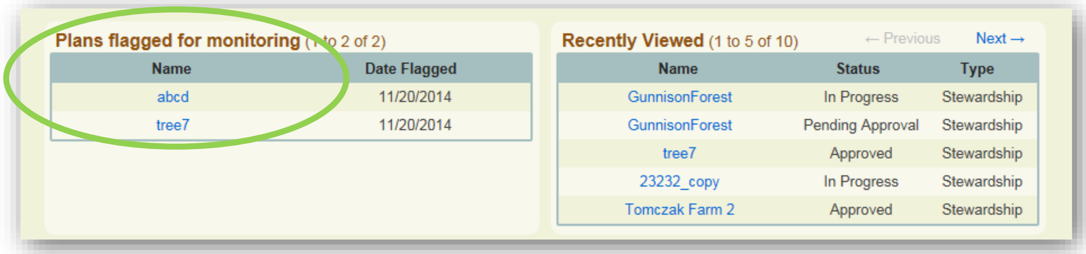


Implementation Monitoring

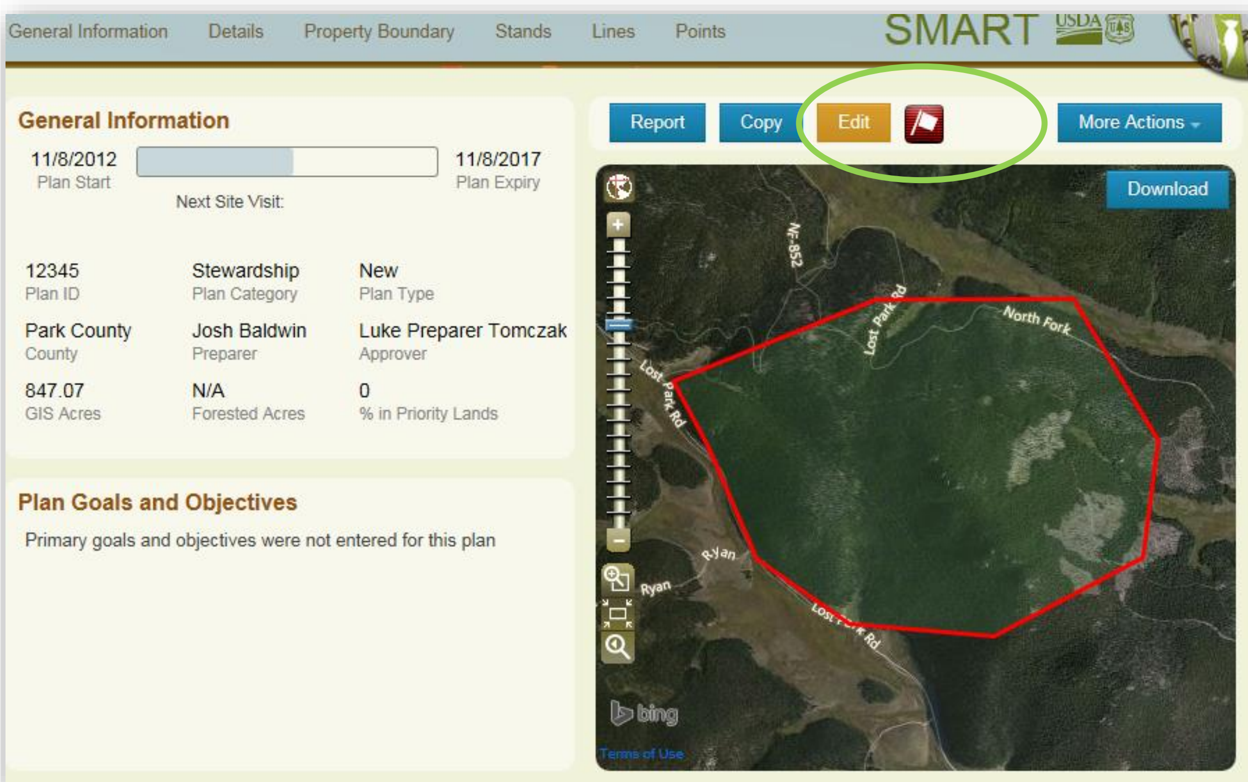
States will use SMART each year to generate a plan monitoring sample, and record monitoring results. For this to be an accurate sample of a state's stewardship plans, all current Forest Stewardship plans need to be entered into SMART and marked as "Approved". Any "In Progress" or inactive plans will not be selected for monitoring. The following summarizes the implementation monitoring process within SMART:

- SMART National Administrators will start the monitoring process by flagging plans nationwide in SMART – sometime after the end of the Fiscal year and before the end of January; only active, approved Forest Stewardship plans will be selected.
- SMART State Administrators will then be able to download a comprehensive report of their state's flagged plans from the Implementation Monitoring page in their Administration module. This report will allow State Administrators to see what plans have been flagged for their state and the monitoring status of the plans. As plans are marked as monitored within SMART, the content of this report will change. We recommend running the State Report throughout the plan monitoring season, and again before the end of the reporting year, to ensure that all plans chosen for monitoring have been verified as implemented or not implemented.

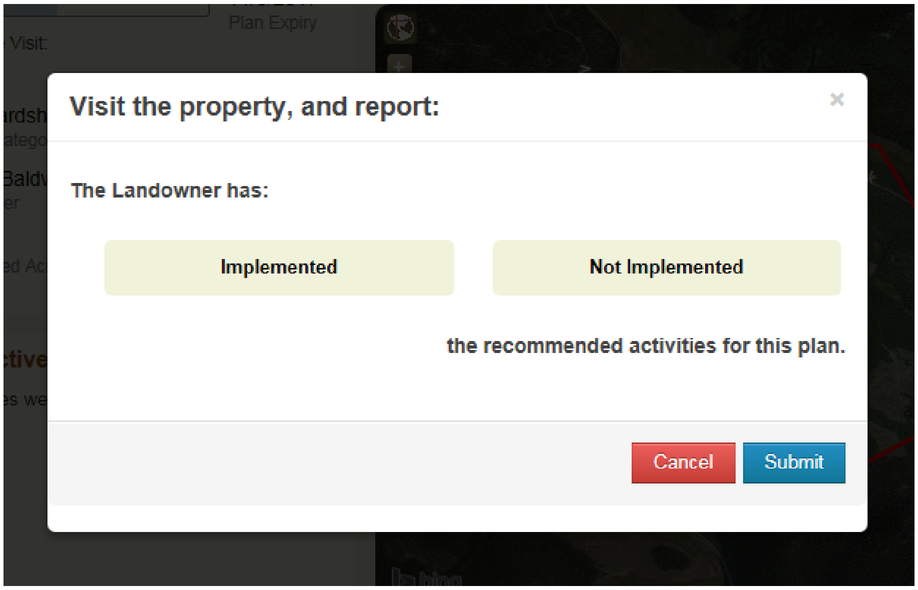
- SMART users who are listed as Plan Preparers for the flagged plans will see a *Plans flagged for monitoring* widget on their home page, from which they can navigate to the "flagged" plan.



- A red flag will be shown on the plan's summary page; clicking the flag button will bring up a window where the plan preparer can select if the landowner has implemented the recommended activities for the plan.



- The Plan Preparer chooses "Implemented" or "Not Implemented". Once the plan has been marked as implemented or not, the flag turns brown, and its implementation designation is recorded in the SMART database.

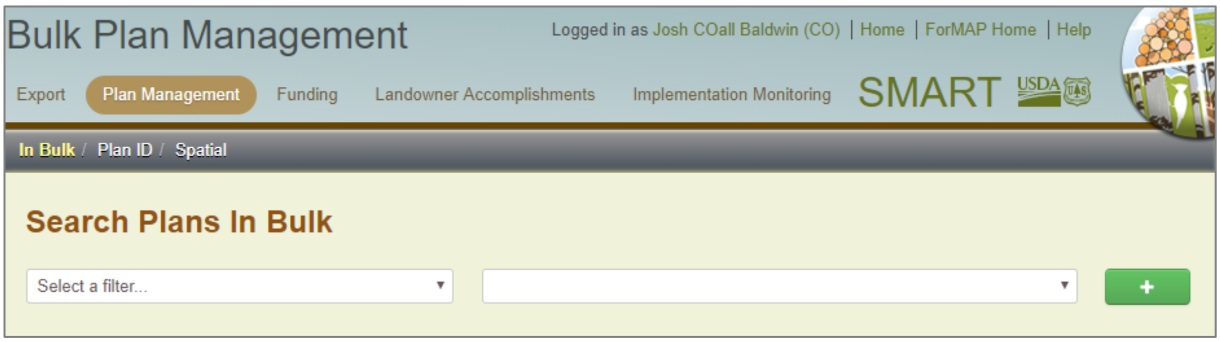


Once all selected plans have been marked as Implemented or Not Implemented, this completes the state's responsibilities for annual Forest Stewardship implementation monitoring in SMART.

As of Fiscal Year 2021, the Forest Service is requiring all states to submit plan monitoring information through the ArcGIS online tool Survey123. States will need to perform their plan monitoring duties inside SMART and inside Survey123. Please contact the Help Desk for more information.

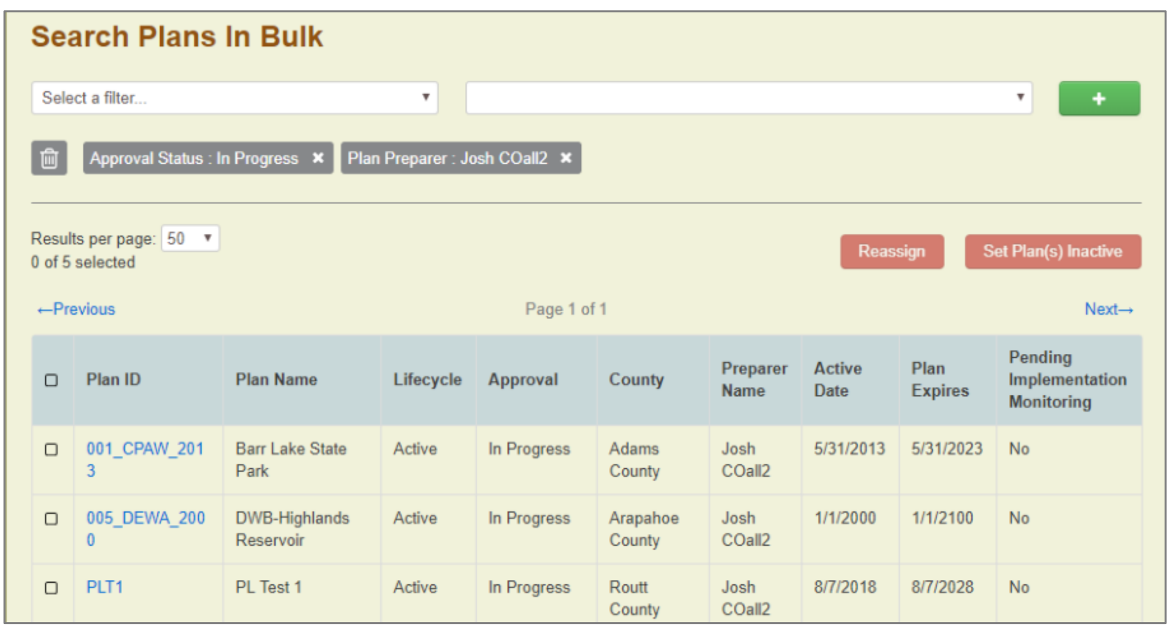
Duplicate Plan Management

State Administrators can use the Duplicate Plan Management tool in SMART to work with redundant management plans. Plans may be duplicated in the database for any number of reasons – including common mistakes such as a forester entering in a plan twice or a GIS technician performing two SADL uploads of the same shapefile. There are three ways to detect and manage duplicate plans in SMART: in bulk, by Plan ID, and by spatial overlaps. All three duplicate management types can be accessed by State Administrators from the Plan Management page inside the Administration module:



Working with Plans in Bulk

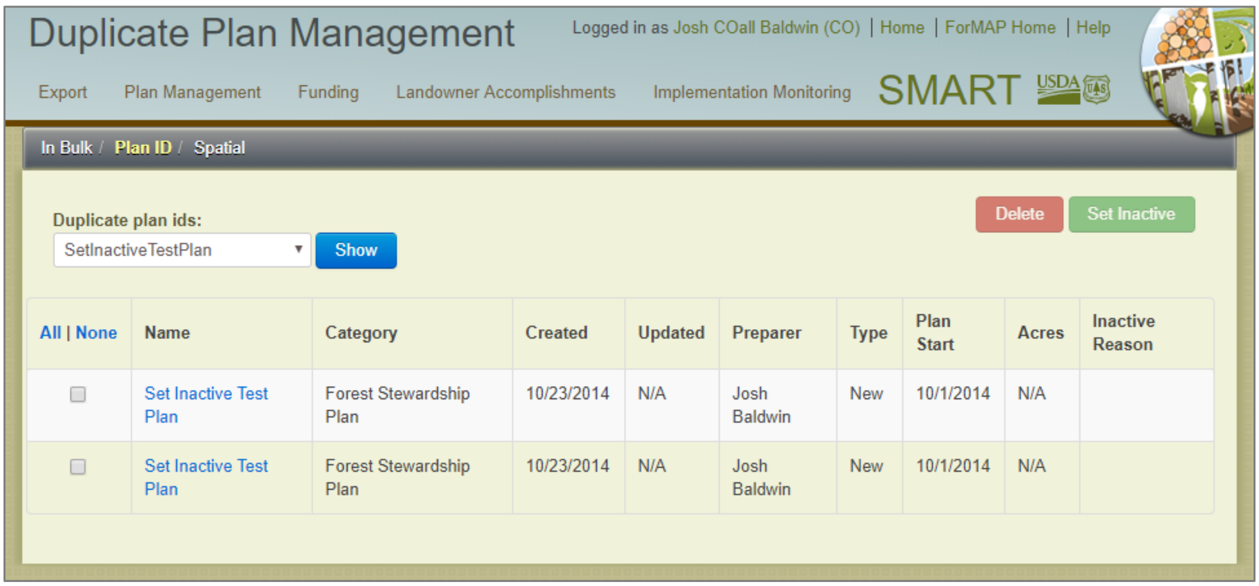
The *In Bulk* tab allows users to search for plans using filters and then manage the returned results. Filters include: Approval Status, Plan Preparer, County, etc. Multiple filters can be selected. In the example below, Approval Status and Plan Preparer filters were selected.



In order to reassign a plan or set it inactive, click the box on the first column of the record. You can select and deselect all results on the page by clicking on the box in the first column of the blue header. Once the record is selected, the red Reassign and Set Plan(s) Inactive buttons are active and can be used.

Working with duplicate Plan IDs

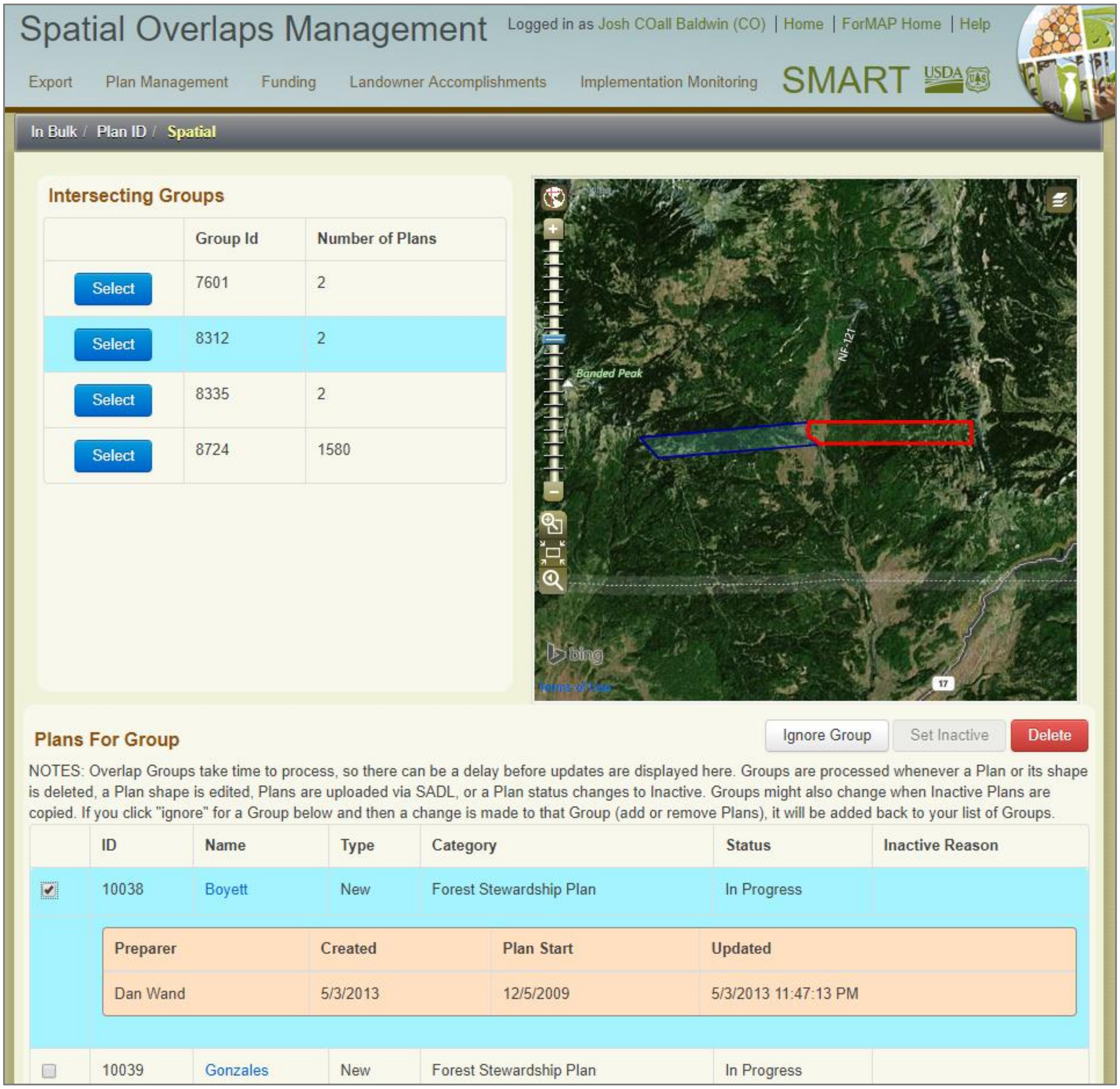
The *Plan ID* tab allows users to view and manage plans that have the same Plan ID. Users simply select the Plan ID of interest, view the plans, and then delete or "set inactive" any of the plans listed.



Working with overlapping property boundaries

The *Spatial* tab will list all intersecting plan boundary groups in a user's state (image on next page). Groups can be selected, and any plan in the group can be deleted or "set inactive". Additionally, users can select the Ignore Group button, and the group will be hidden from further spatial overlaps management views.

Please note: overlap groups take time to process, so there can be a delay before updates are displayed here. Groups are processed whenever a Plan or its shape is deleted, a Plan shape is edited, Plans are uploaded via SADL, or a Plan status changes to Inactive. Groups might also change when Inactive Plans are copied. If you click "ignore" for a Group and then a change is made to that Group (add or remove Plans), it will be added back to your list of Groups.


Spatial Overlaps Management
Logged in as Josh COall Baldwin (CO) | Home | ForMAP Home | Help
Export
Plan Management
Funding
Landowner Accomplishments
Implementation Monitoring
SMART
In Bulk / Plan ID / Spatial
Intersecting Groups
Group Id
Number of Plans
Select
7601
2
Select
8312
2
Select
8335
2
Select
8724
1580
Banded Peak
NF-121
Plans For Group
Ignore Group
Set Inactive
Delete
NOTES: Overlap Groups take time to process, so there can be a delay before updates are displayed here. Groups are processed whenever a Plan or its shape is deleted, a Plan shape is edited, Plans are uploaded via SADL, or a Plan status changes to Inactive. Groups might also change when Inactive Plans are copied. If you click "ignore" for a Group below and then a change is made to that Group (add or remove Plans), it will be added back to your list of Groups.
ID
Name
Type
Category
Status
Inactive Reason
10038
Boyett
New
Forest Stewardship Plan
In Progress
Preparer
Created
Plan Start
Updated
Dan Wand
5/3/2013
12/5/2009
5/3/2013 11:47:13 PM
10039
Gonzales
New
Forest Stewardship Plan
In Progress

ShapeUp Tools

About ShapeUp

- The SMART ShapeUp Tool allows you to copy a shape from a shapefile and paste it into SMART Web or SMART Desktop.
- Shapes can be pasted into any 'In Progress' Management Plan, Project, or Landscape Plan in SMART. The ShapeUp tools can be used for Property Boundaries, Stands, Lines, and Points – as well as Landscape Scale Restoration (LaSR) Project Impact Areas.
- Only one shape can be pasted at a time; multi-part polygons are ok.
- Stand, Line, and Point shapes can only be added if the Property Boundary has been mapped, and they will be checked to make sure they fall within the Property Boundary.

ShapeUp Tool Information

The SMART ShapeUp tools are available for download from the Supporting Software Page, accessed from your SMART home page, as well as here - *https://apps.fs.usda.gov/formap/SMART/Home/Downloads*

For the desktop version, please unzip the downloaded folder and open (double click) on the "SMARTShapeUp.exe" file. This will open the software. There is an information box in the lower left-hand corner that explains what ShapeUp is and how to use it.

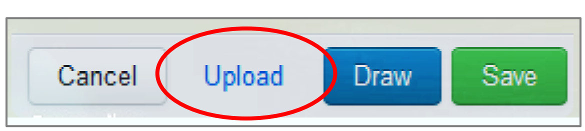
For the ArcMap and ArcGIS Pro add-ins, a Help Document is provided in the ShapeUp download folder. This will lead you through the process of installing and using the tool.

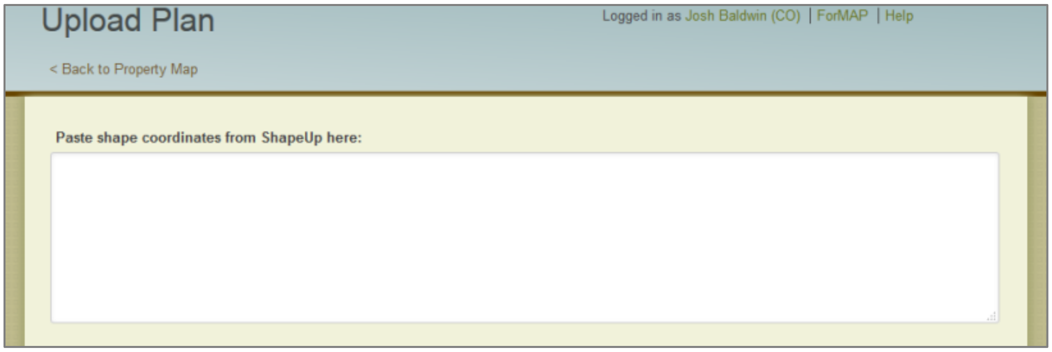
If additional assistance is needed please contact the ForMAP Help desk at 303-275-5341 or *support@formap.info*.

How to use the ShapeUp tools

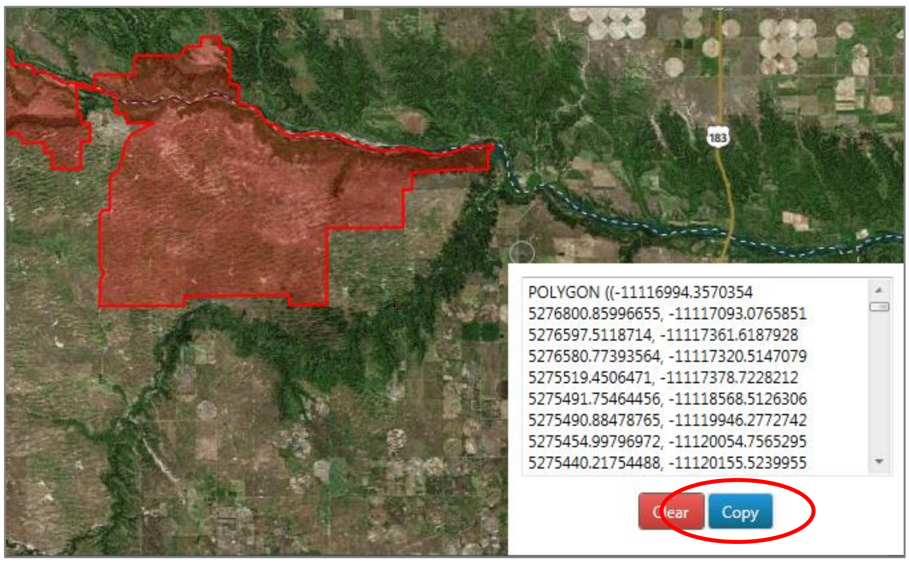
A. *ShapeUp desktop application*

   1. On the SMART Property Boundary page, click **Upload** from the SMART mapping toolbox; this will open the Upload Project page.

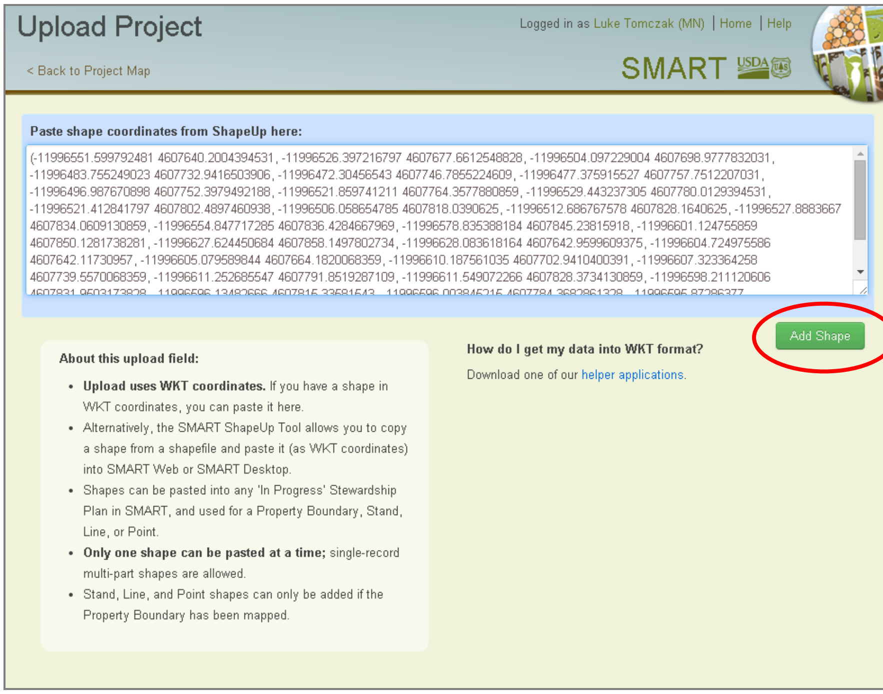




2. Open the ShapeUp desktop tool, click the Upload Shapefile button, navigate to the property boundary shapefile to be uploaded, and open it. Left-click on the shape, and click **copy** in the coordinates window.



3. Navigate back to the SMART Upload page and paste the WKT coordinates (ctlr-V or right-click, paste) into the shapefile coordinates text box.
4. Click **Add Shape.**



5. Click **save** in the mapping toolbox. This will commit the property boundary to your management plan.

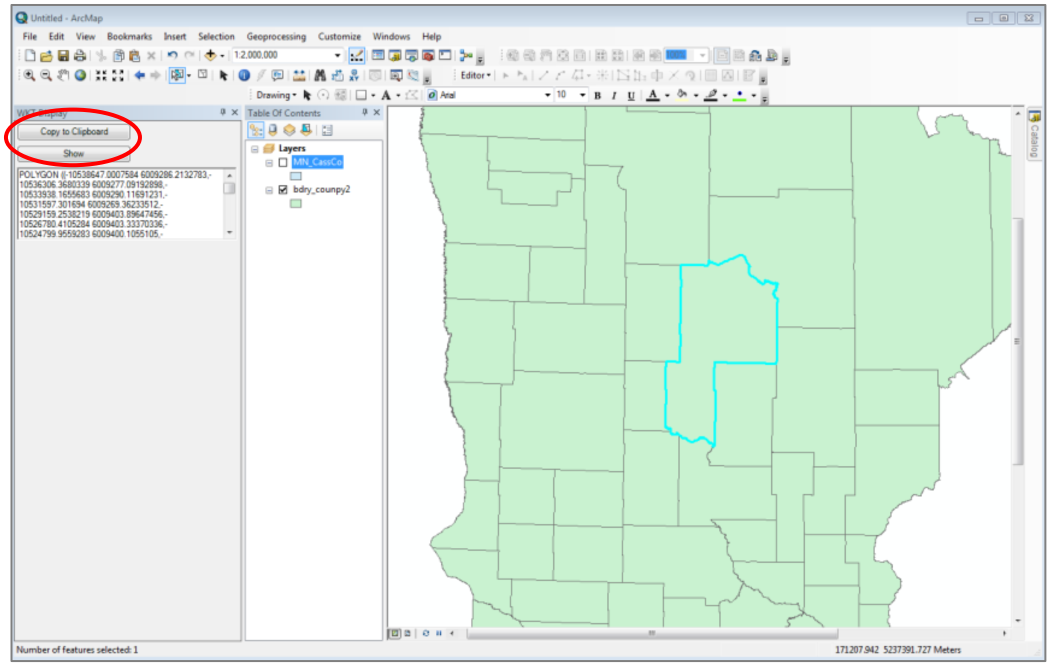
You can use the ShapeUp tools to add other GIS feature, such as lines, to your management plan using this same method.

B. ShapeUp ArcMap add-in

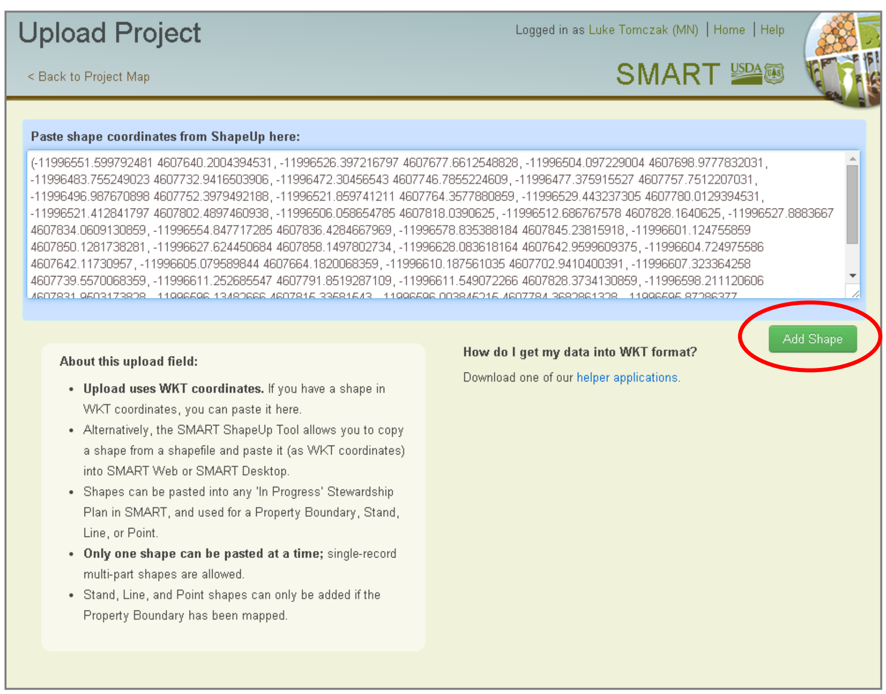
1. On the SMART Property Boundary page, click **Upload** from the SMART mapping toolbox; this will open the Upload Project page.

2. Open the ShapeUp ArcMap add-in tool by clicking on the **Selected Geometry to WKT** icon on your ArcMap toolbar.

3. Select the polygon of interest and click **Copy to Clipboard.**



4. Navigate back to the SMART Upload page and paste the WKT coordinates (ctlr-V or right-click, paste) into the shapefile coordinates text box.
5. Click **Add Shape.**



Click **save** in the SMART mapping toolbox. This will commit the property boundary to your management plan.

You can use the ShapeUp tools to add other GIS feature, such as lines, to your management plan using this same method.

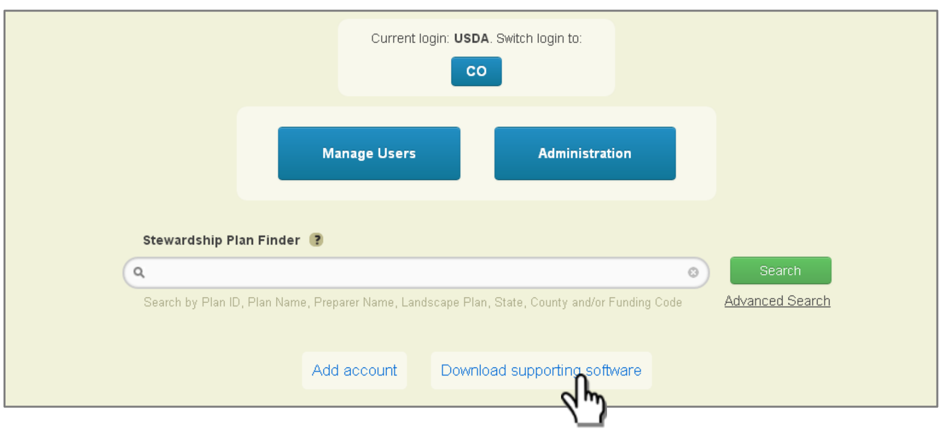
Stewardship Accomplishment Data Loader (SADL)

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 will not have the eAuthentication permissions needed to perform any SADL uploads.

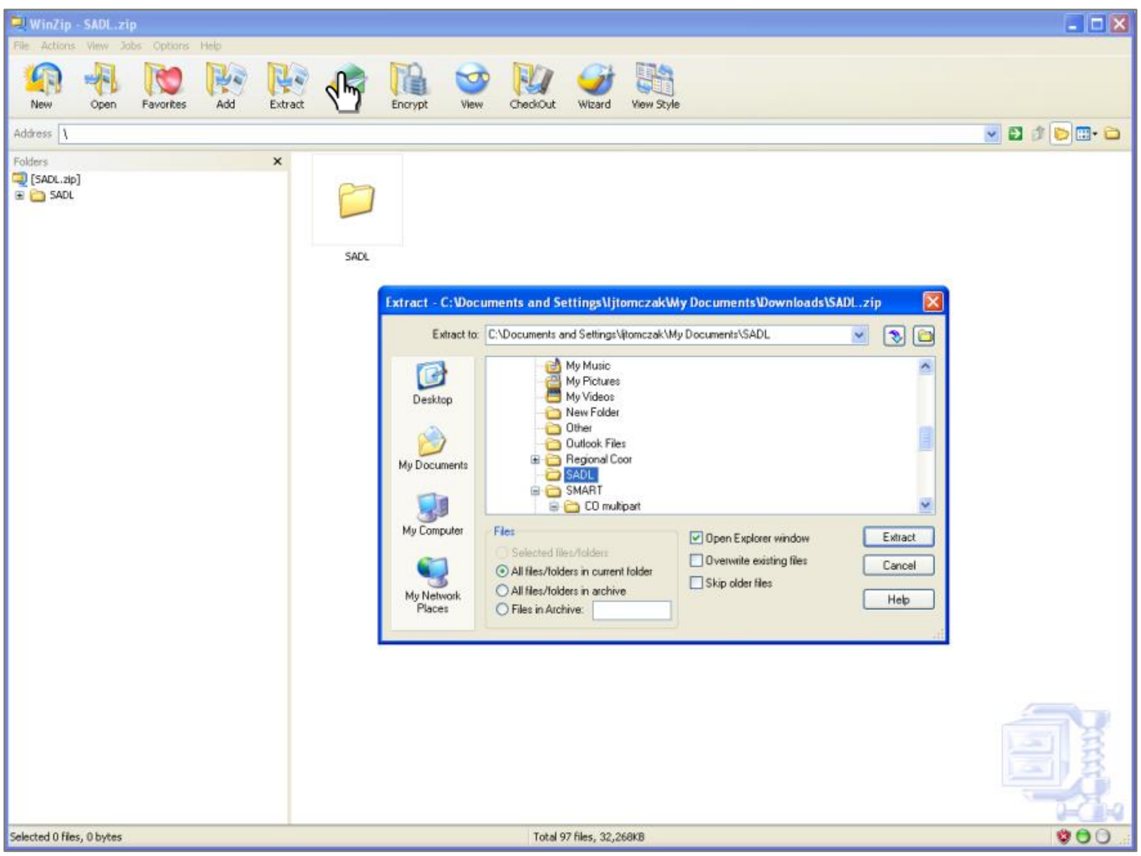
Downloading the SADL:

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

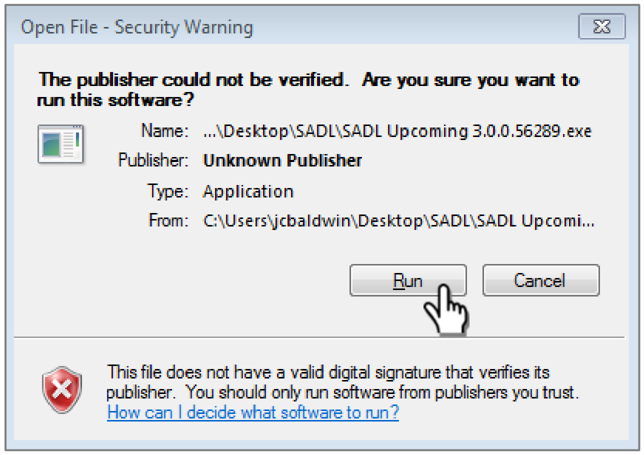


2. Select **Get the SADL Tool.** This will begin the process of downloading the SADL.exe file to your computer. From this page you may also view the SADL Guidance page, including usage notes and shapefile specs (included at the end of this document).

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



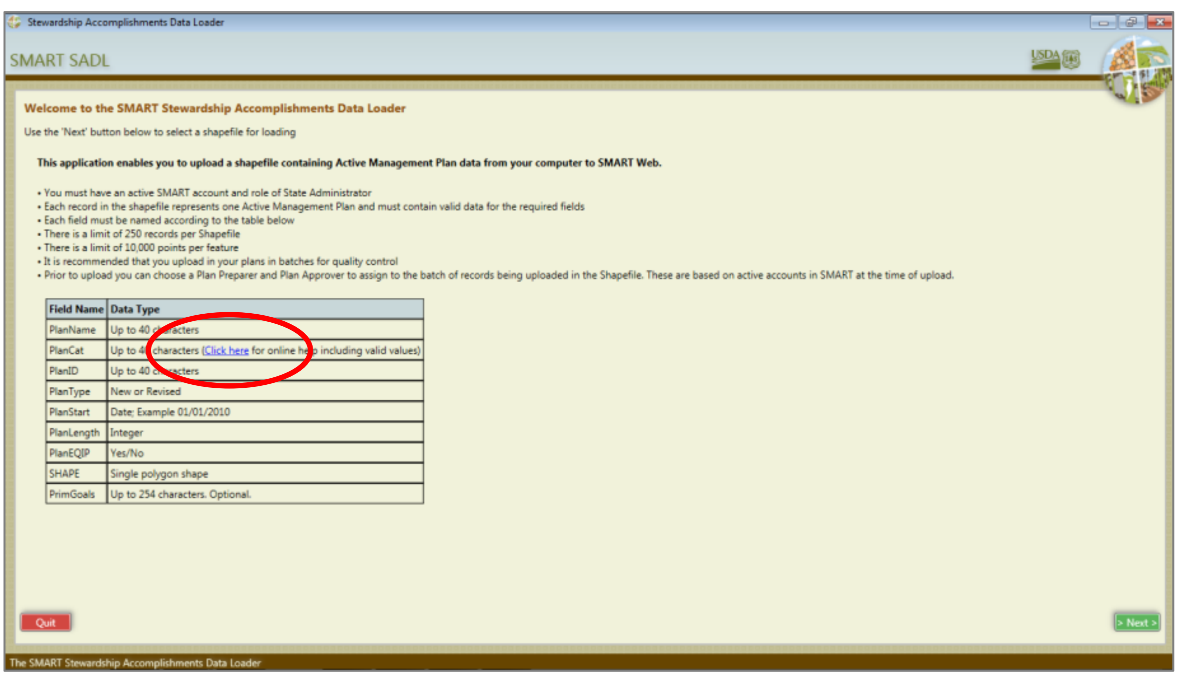
4. Navigate to the location of the downloaded file and double-click the SADL.exe file. If you do not have administrative privileges for your computer, you may have to right-click the file and select "Run Elevated". Also note: if you get a message that "The publisher cannot be verified" simply select the run button. Finally, follow through all the steps necessary to install the program onto your computer.



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.

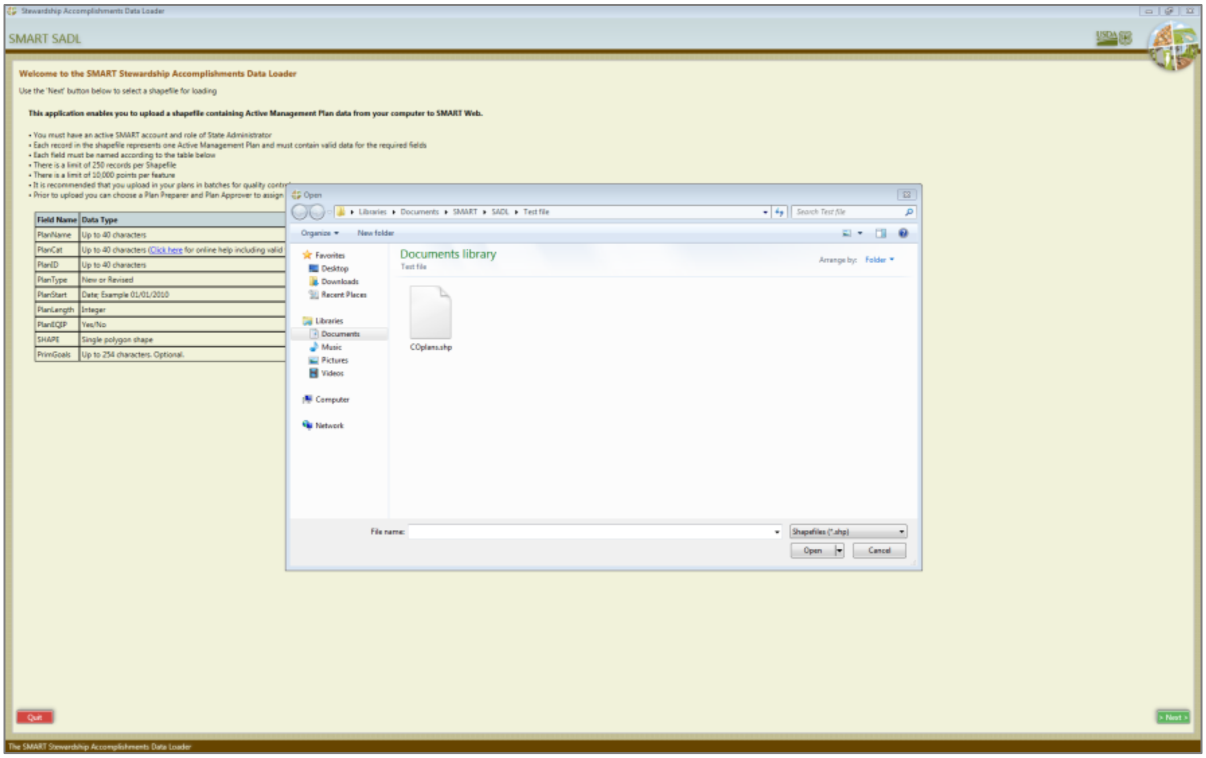
The SADL application will open to its main page. Here you will find general SADL information and data requirements.



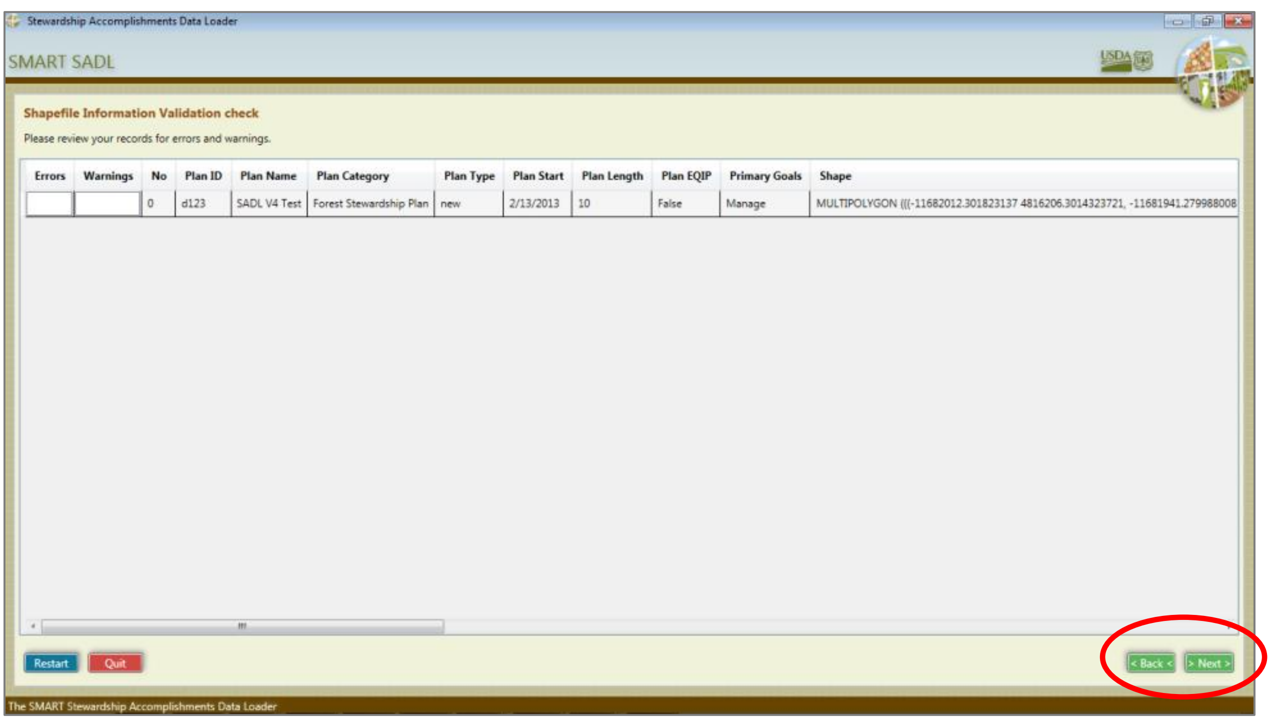
Please review the SADL Guidance page by clicking on the blue hyperlink within the PlanCat field. It is also included at the end of this document. It is very important that your Shapefile is formatted correctly with the required data fields below. The fields may be in any order, and you may have other fields in the attribute table of your shapefile. Any extraneous fields will be ignored during the upload.

1. Select the Next button to begin the upload process. Required data fields are:
    - 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 section below)
    - PlanID
    - PlanType
    - PlanStart
    - PlanLength
    - Funding
    - SurveyAcre (Optional)
    - PrimGoals (Primary Goals, Optional)
    - SHAPE (Polygon)
2. A navigation window will open, and you may now navigate to the shapefile that is prepared for upload. Select it and click **Open**. This part of the process validates the shapefile to make sure the fields were set up correctly. Your shapefile does not need to have any specific projection, as it will be re-projected on-the-fly into SMART's projection. If you get any 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 easily resolved.



You will now see a list of Plans within your selected Shapefile. In the example below there is one Forest Stewardship Plan. On the far left you will see an Errors column; if this column is empty then the Shapefile is ready for upload. If you see red error messages in the Errors or Warnings column they will need to be resolved before you can continue.



Possible errors include:

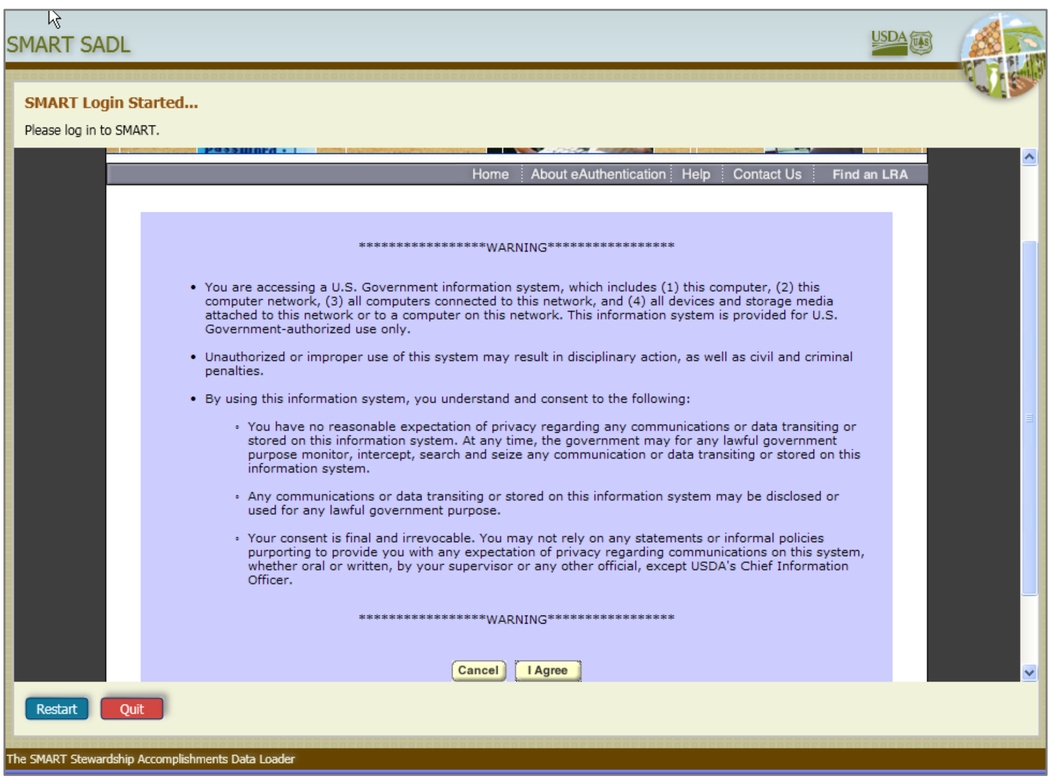
"PlanDate – Must be a valid date time value" -- the PlanStart field is not set up properly. Please see the included shapefile spec sheet for field requirements.

"PlanPropertyShape – Must be null or a valid Oracle WKT" -- the plan boundary has geometry errors that will need to be resolved. Primary examples include adjacent or excessive vertexes (the SMART Oracle database has a very small tolerance for this) and line self-intersections. You will need to review each polygon that receives this error and fix any geometric problems that are apparent.

"No such field:'PlanXXXX'" -- one or more fields are missing from the shapefile. You will need to add and populate whichever fields are noted.

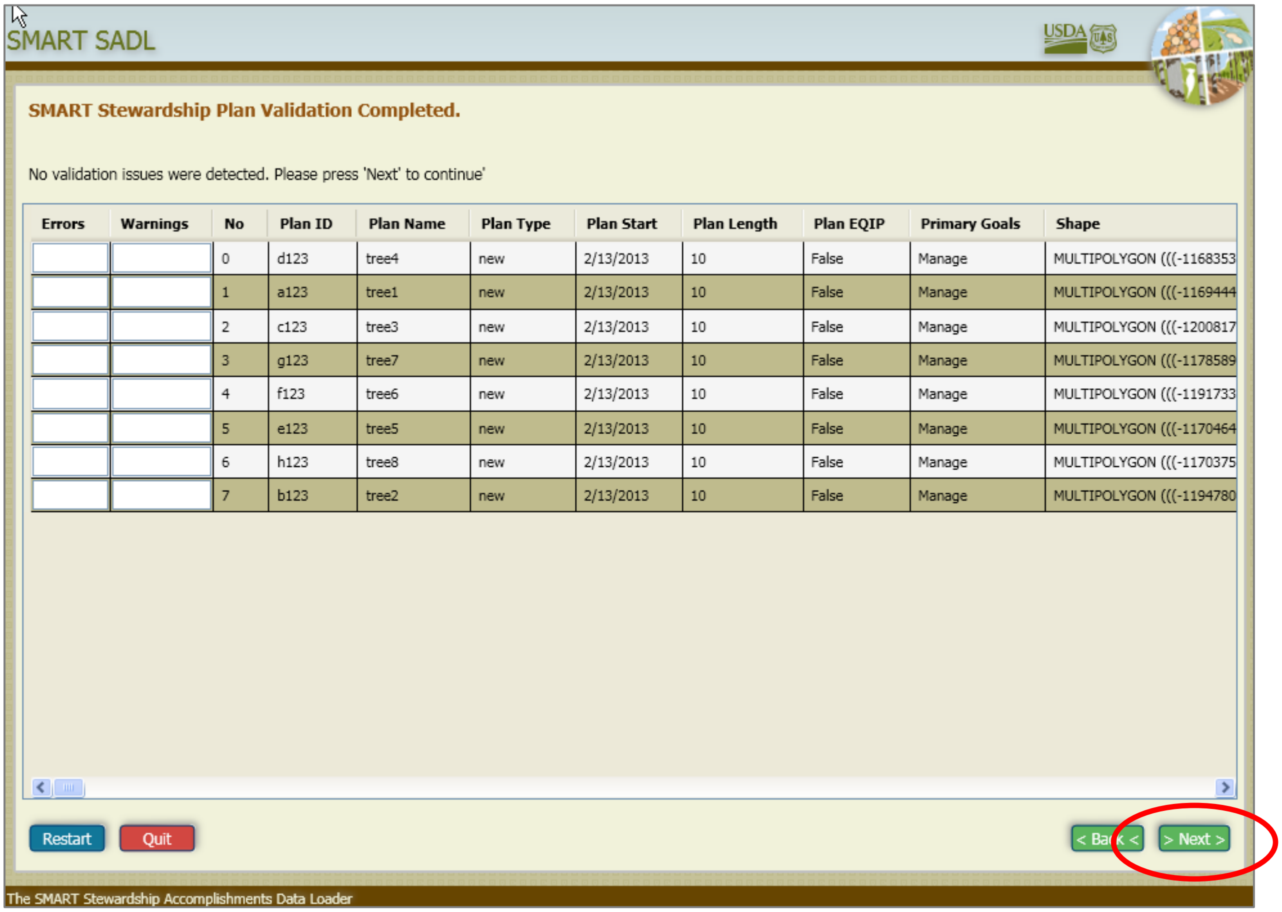
Error 24306 -- the shapefile may have z or m values associated with it, or they are enabled for the shapefile. You will need to purge these values or disable them before your upload.

3. Once this validation check screen is error-free, click **Next** to continue with your upload. The next screen will ask you to log into SMART with your eAuthentication credentials.

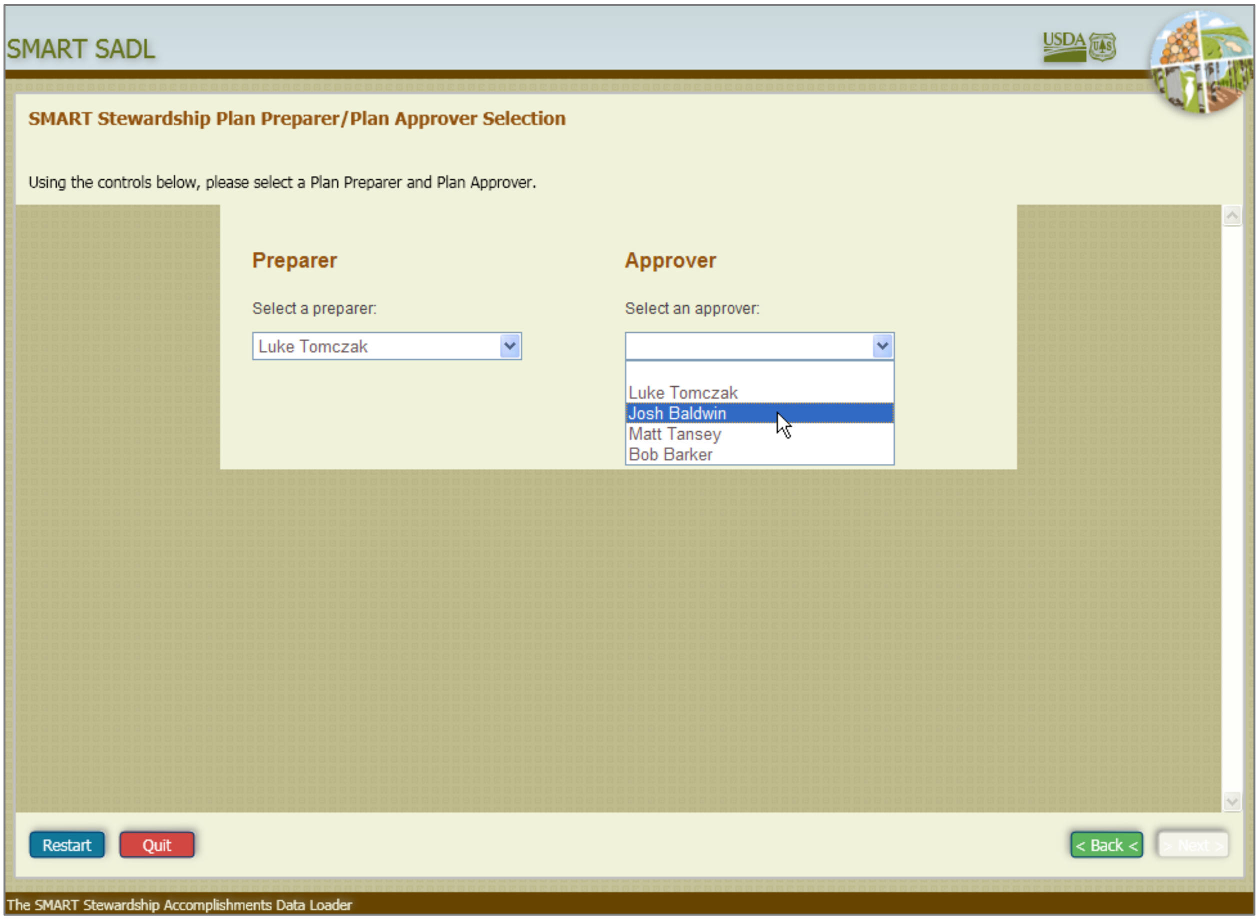


Once you are successfully logged into SMART, you will briefly see your SMART homepage; the SADL will then go through its final validation of your shapefile. In the far-left columns in this window you will be able to see if there are any errors or warnings detected by SMART during this step (image below).

4. If the columns are blank, click **Next** to continue.

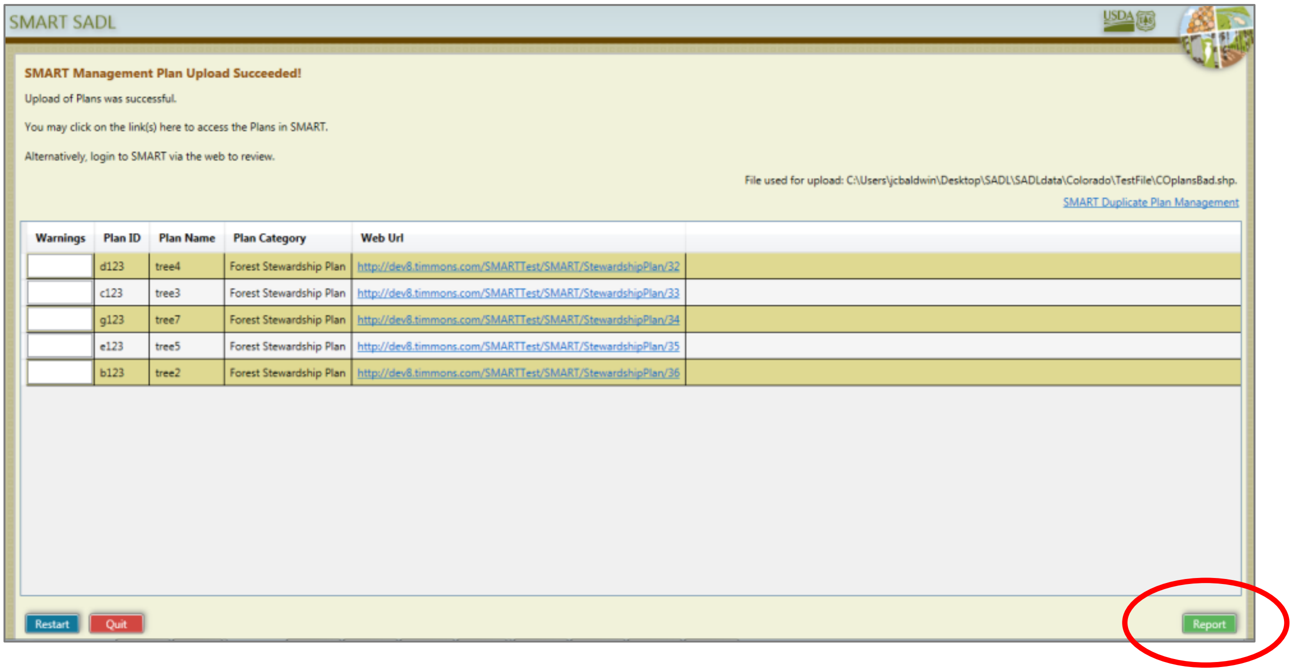


The next step in the process will ask you to select a Plan Preparer and a Plan Approver to associate with these plans. The plan preparer and approver you select will be assigned *all* plans being uploaded. Plans uploaded with the SADL will show up in SMART as “Approved” and can be edited later by selecting the Edit button on the plan summary page. Note: The Preparer and Approver can be the same.

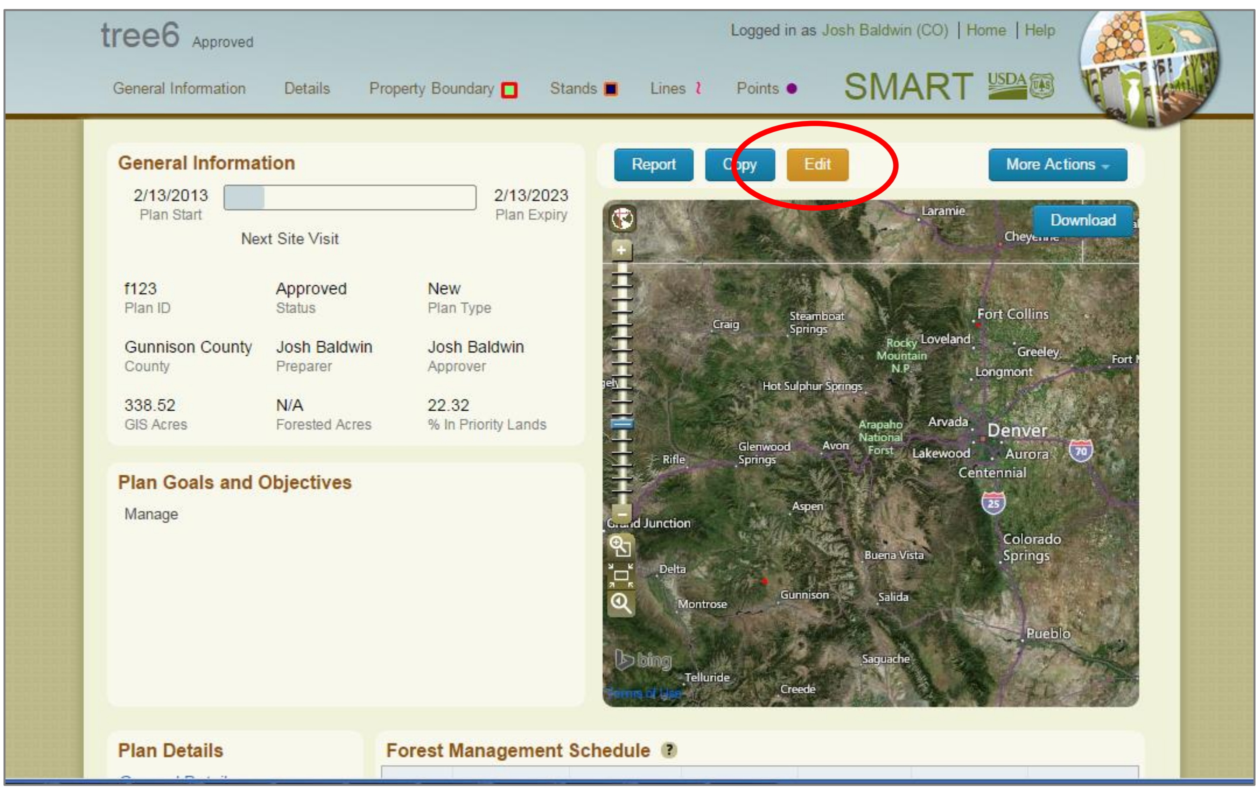


5. Once a Plan Preparer and Plan Approver have been selected for your plans, click the green **Next** button in the bottom right-hand corner.

This will start the plan upload into the SMART program. When the upload is complete you will see "SMART Stewardship Plan Upload Succeeded!" at the top of the window. 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. This is the step that will tell you if you are uploading any duplicate plans, i.e. plans with the same Plan ID already in the database. If you receive this warning, please see the Duplicate Plan Management section below. You can also create a plan report during this step if desired (image on next page).



Your Stewardship Plans have now been uploaded to SMART. You can view your plans by clicking on the links provided in the SADL tool or by accessing SMART and searching for them. The links provided in the SADL tool will take you to the individual plan summary page for the selected plan. Using the **Edit** button allows you to make changes to your plan once it has been uploaded to SMART.



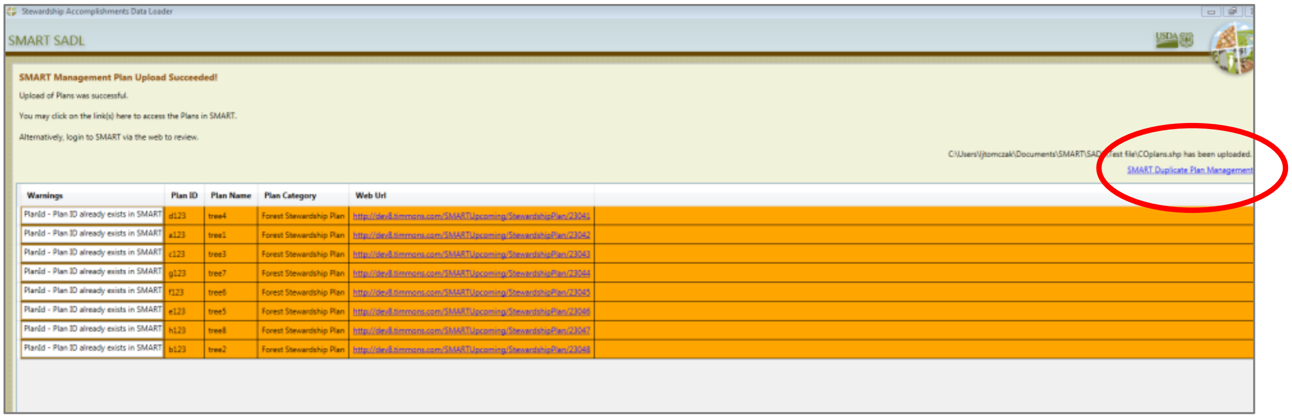
* Important Note

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 your state's plans are accurately represented in the SMART database. Please consider the following items while developing your data management plan:

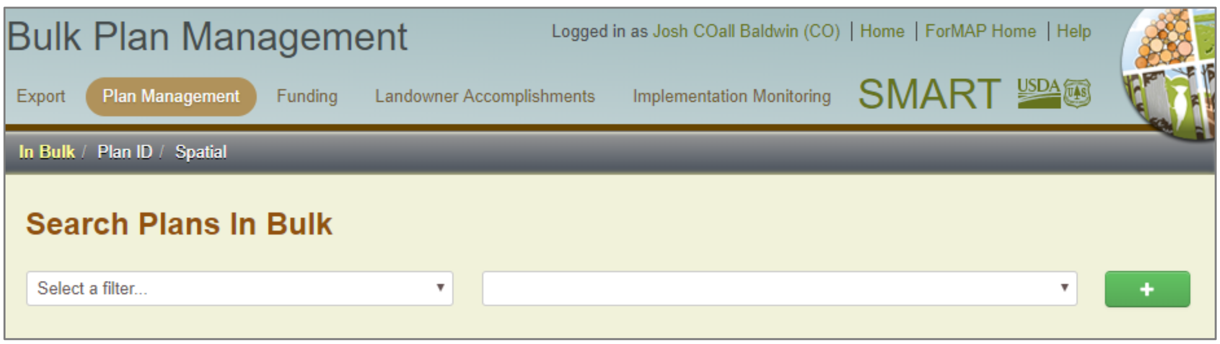
1. After every upload, spot check SMART to make sure the correct number of plans made it into the database. You can do this by keeping a spreadsheet of how many plans your state intends to upload and check the total number of plans in your state post-upload.
2. During the validation stages, pay special 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 stricter rules than those of ArcGIS, so you may have to perform additional shapefile clean-up in order for the shapefile upload to succeed. Please contact the Help Desk for additional assistance and resources.
3. Once uploads are complete, we recommend using the duplicate plan management tool. If there are duplicate plans, a warning message will be shown after a successful upload. The tool can also be accessed from the Administration module. Please see below for further direction.

Duplicate Plan Management

After successfully uploading a shapefile, you may get the "Plan ID already exists in SMART" warning. If so, you can use the SMART Duplicate Plan Management tool to manage these plans. Do this by clicking on the *SMART Duplicate Plan Management* blue hyperlink provided. You may also access this feature directly in SMART inside your Administration module.



Please see the above section (pg. 80) for details on managing duplicate Plans.



Shapefile Specifications

SADL will use data contained in the following fields. The data in the fields must meet the requirements noted.

Field names are ***not*** case sensitive.

There is a limit of 250 records (i.e. 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[1]	[1]If this field is *not* provided in the shapefile, the value will default to "Forest Stewardship Plan". 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

Name	Description	Type	Optional/Required	Notes
PlanStart	Date the Plan begins	Date	Required	Data type may be String/Text but must be formatted as yyyy/mm/dd
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 the Plan is funded by any existing and active Federal fund	String/Text	Required	Current Federal active funds are: CE CREP CRP CSP EFRP EQIP FSP LSR SPCH SPFH SPS4 SPS5 UCF WRP BCAP CJLRP HFRP RCPP SLP
SurveyAcre	Surveyed acres of the plan	Decimal	Optional	Examples: • 100 • 23.7

Name	Description	Type	Optional/Required	Notes
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 that are available to choose from 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.

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**

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

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.

Appendix 1 – ForMAP Changelog

New in ForMAP Version 7

New features/enhancements

- Move home page notice from SMART module to ForMAP landing page to let users know of system incidents.
- Added ShapeUp tools for ArcGIS Pro 2.x and 3.x versions
- Added filters to Manage Users page to show All, Only Active, and Only Inactive users
- Added Elmah Error page direct access from National Administration page
- Numerous web application and server infrastructure upgrades

Bug fixes to:

- Spanish version where property resource conditions would not be stored properly
- Pacific Island telephone area codes
- Timber misspellings in the Management Plan download
- LaSR issue deleting a project that has quantitative accomplishments
- Missing foreign key between LaSR fields
- Plan types in State GDB download being reversed
- Priority Lands Impact Areas remain in the queue when it is deleted before the % in Priority Lands is calculated
- ForHealth issue where search results couldn't be downloaded
- Error on SMART Advanced Search when using spatial parameters (National Forests, etc.)

New in ForMAP Version 6.1.6

New features included adding NASF metrics to ForHealth, updates to LaSR field labels.

Public-facing changes included fixing typos in Prism and the SADL download link.

New in ForMAP Version 6.1.4

This release updates base map layers and geocoding with ESRI base maps and ESRI geocoding services. In addition, database connection parameters were added for better connection and some text in the public page were also updated.

New in ForMAP Version 6.1.3

Included in this release are: an update of the Northeastern Area State and Private Forestry to the Eastern Region, changes to the selection of Forest Stewardship plans for monitoring as identified in the "Modernizing Stewardship" initiative, updating the LaSR project brief to include resource objectives, added resource objectives to the LaSR project search function, updated LaSR search results report to include resource objectives and finally, fix minor bug in ForHealth search function.

New in ForMAP Version 6.1.2

2020 updates to the Forest Stewardship Federal Investment Area priority lands rasters and image service.

New in ForMAP Version 6.1

- Version 2.1.0 of ShapeUp made available for download through ForMAP
- Bug fixes to activity and search pages

New in ForMAP Version 6.0

ForMAP Version 6.0 broadens the scope of ForMAP to include Prism – a web map executive dashboard that presents SMART and LaSR accomplishments data for stakeholders and the general public. ***https://apps.fs.usda.gov/prism/***

New in ForMAP Version 5.3

Bug fixes to SADL, 50 field limit, and plan monitoring pagination widget

New in ForMAP Version 5.2

- ShapeUp - Allow selection of 2+ (or all) shapes for copying (as single multipart) into ForMAP modules
- Add fields to National Admin User Report
- Fix slow to load SMART home page
- Improve usability of the SMART Plan Summary xls Report
- On the certifications and restrictions page, change 'Other 3rd party certification' to "Property is PEFC certified"
- On the certifications and restrictions page, by the Tree Farm line delete the "and certified"
- Change Implementation Monitoring flagging to exclude Plans less than 2 years old
- Bulk plan management tool
- Bulk SMART plan deactivate
- Bulk SMART plan reassign

New in ForMAP Version 5.0

High-level Functionality:

- ForHealth – Forest Health module
- Migration from USFS MCI to VDC server environments

Functionality Additions:

- Added Plan spatial overlap management for State Admins to web application
- State GDB export now includes Projects and Landscape Plans
- Regional (Northeast, South, West) GDB export for National Administrators

Enhancements:

- Update to SADL to replace *EQIP* field with *Funding* field
- Update to SADL to add *SurveyAcre* field
- Update (of web service) so that it supports upload of SMART Plans with > 2000 vertices from SADL
- Update to SADL to detect and warn about spatially overlapping Plans
    - Overlapping within Shapefile
    - Potential to overlap in SMART
- Enhancement to allow Inactive Plans to be copied, regardless of Plan Status
- Changed Implementation Monitoring to flag all Stewardship Plans > 1000 acres when not flagged in the last 5 years, and to remove those Plans from the random sampling pool
- Implementation monitoring flagging logic now excludes plans that will expire in the "current" fiscal year

- Added pagination for “Plans flagged for Implementation Monitoring” widget
- Added new capability for Project Approvers to have email triggered when a Project is submitted and Project Preparers to get emails when Project is approved, rejected, deleted
- Changed auto-emails to separate addresses with a semicolon rather than comma
- Email templates replace references of Stewardship Plans to "Management Plans" and SMART references with "ForMAP"
- Updated ShapeUp ArcGIS Add-In to the most recent build (now allows multi-part polygons)
- Updated ShapeUp ArcGIS Add-In documentation

SMART Version 4.0 – now “ForMAP”

SMART Version 4.0 broadens the original scope of SMART to incorporate other State and Private Forestry spatial accomplishment reporting. Two major updates were implemented in this version: Forestry Mapping and Accomplishments Portal (ForMAP), a new umbrella portal which houses SMART, as well as the Landscape Scale Restoration (LaSR) Projects reporting module.

SMART Version 3.0

Functionality Additions:

- SMART Web – Spanish version now available
- Limit Consultant’s ability to only view plans for which they are preparers
- Implementation monitoring – flagging Plans, updating status, and downloading reports
- Expansion of Stewardship Plan module to allow other Management Plan Categories
- Duplicate Plan Management
- New version of the Stewardship Accomplishment Data loader (SADL)
- Viewable Priority Lands layer

Enhancements:

- Increased narrative fields character count from 1,000 to 4,000
- Request user role changes from within My Account page
- New categories for FSC certifications page

SMART Version 2.0

Functionality Additions:

- Projects (and tabular Project search)
- Landscape Plans (and Landscape Plan search)
- Stewardship Plan Search by Landscape Plan Shape
- View neighboring Stewardship Plans
- Landowner Accomplishments Reporting by State Administrators
- Activity Code Management by National Administrators
- Stewardship Accomplishments Data Loader (SADL)
- Plan Expiration and Expiration Warnings/Notifications
- Allow e-mails up to 256 characters
- Updated URLs for spatial layers being used from the USDA Data Warehouse, and added configuration capability