

# Toolkit 7.0 / NPAD Training

Pre-Deployment Training (1<sup>st</sup> Opportunity)  
January 22, 2014

Pre-Deployment Training (2<sup>nd</sup> Opportunity)  
January 30, 2014

Teleconference No: 888-844-9904  
Pass Code: 9521292

- Please mute your telephones and your computer microphones.
- Please do not put your telephone on hold during the teleconference.

# Agenda

- Why Change Toolkit?
- Data Migration – NCP to NPAD
- What's new in Toolkit 7.0
  - Working with the Area of Interest (AOI)
  - Toolkit Views
  - New Business Rules for Planning Land Units (PLUs)
  - Practices
- Preparing for Data Migration and the Toolkit Update
- Where to find guidance documents
- Toolkit 7.0 Live Demo
  - Create a new plan
  - Edit a plan linked to a ProTracts contract
  - Practice Scheduler changes

# Why Change Toolkit?

The original version of Conservation Desktop was not accepted by NRCS.

The agency is still moving forward toward CDSI objectives with the end goal of a new Conservation Desktop and Mobile Planner (scheduled for deployment in CY2015).

The first step in moving forward is to get the National Planning and Agreements Database (NPAD) on line and updating Toolkit to utilize the new database.

The interim projects, which include updating Toolkit, are called the Foundation Maintenance Improvement (FMI) effort.

# Why Change Toolkit?

## FMI Products:

1. An updated Customer Service Toolkit connected to a new planning database – NPAD.
  - Enforce the *Single Plan* concept and eliminate “pancaked” plans.
  - Improve conservation planning with new land uses and resource concerns.
  - Improve Agency performance reporting by geospatially locating all land units and practices
2. A Document Management System (DMS) to store and manage financial assistance documents
3. Geospatial Web Services for National, State, and local GIS data
4. A Toolkit Erosion Plugin for wind and water erosion calculations

# Why Change Toolkit?

➤ Phase 1 of the Toolkit update:

- Deployed February 3, 2014
- Will include migration of planning data
- Will modify Toolkit to work within the new database
- Will incorporate new land use designations and land use modifiers

# Why Change Toolkit?

➤ Phase 2 of the Toolkit update:

- Deployed March 2014
- Users will be able to select land from multiple plans and digitize any new land to create a Conservation Stewardship Program plan.
- Will integrate the Conservation Measurement Tool (CMT) with Toolkit to upload new practices and activities to create a practice schedule.
- Will implement a Conservation Management Units (CMUs) tool to quickly select multiple land units to schedule practices by land use.
- Users will be able to unlock PLUs contracted through ProTracts to modify land unit boundaries.

# Why Change Toolkit?

- Later Updates for 2014 include:
  - Automating symbolization when practice is planned and certified.
  - Incorporating NRCS' new resource concerns.
  - Integrating ArcGIS 10.2.
  - Ability to complete land transfers.
  - Calculating soil loss for PLUs with the Integrated Erosion Tool Plug-In.

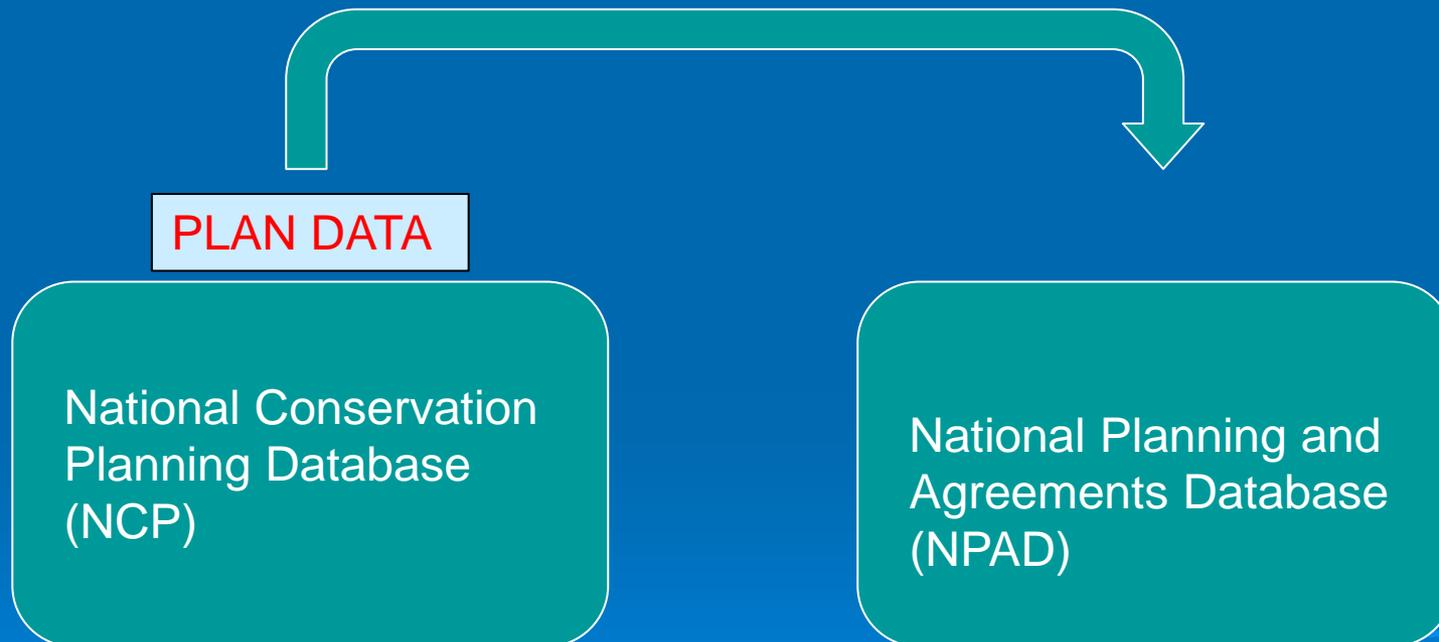
# Why Change Toolkit?

## Impacts on Field Users

- Toolkit will be shut down for up to 6 days during migration.
- Toolkit users must learn new plan development processes.
- Reporting will be stream-lined:
  - Practices certified in ProTracts or Toolkit will automatically be updated in NPAD and progress will be harvested directly from NPAD.
  - The only progress related procedures in Toolkit will be changing the plan approval date anytime you write a new plan or update a plan with additional practices.

Questions?

# Data Migration



# Data Migration - NCP to NPAD

## What is Migrating

- All active plans and land units that have practices will migrate to NPAD.
- Any plan that was archived but linked to an active contract will migrate to NPAD as an active plan.
- Easements that did not have a plan in Toolkit but have a valid SCIMS ID in NEST will migrate as a new plan that contains the easement boundary as the only land unit.

# Data Migration - NCP to NPAD

## What is Not Migrating

- Archived plans are not migrating to NPAD for check out in Toolkit. The information from these plans can still be found from other reporting tools such as IDEA, PRS or CARS.
- Plans that do not have any land units or practices.
- Land Units that do not have any practices.

# Data Migration - NCP to NPAD

Migration to NPAD will incorporate the business rules for migrating all active conservation plans based upon the below priority order of plans

- Easements
- ProTracts Contracts
- CRP
- CSP
- General Plans

Some plans will require cleanup after migration. We'll talk more about that later.

# Land Unit Migration

All land units must be migrated as a polygon.

- If a land unit polygon is mapped it will migrate to NPAD.
- Any land units that are unmapped that have a practice will migrate as a polygon that is the shape of a triangle. The triangle will be located around the practice point (lat long) associated to the practice.
- Any land units that are unmapped that have a practice that is also unmapped (lat long) will migrate as a triangle to the county seat.

# Practice Migration

All practices must migrate with a practice shape.

- If there is an existing practice shape it will migrate.
- If there is no practice shape, a practice shape will be generated during migration in the correct point, line, or polygon feature class.

Point Geometry	Line Geometry	Polygon Geometry
No	Mile	Acre
Ani Unit	Ft	
Ac-ft	Linear Ft/Yr	
Cu ft		
		Sq ft

# Land Use Migration

<b>NPPH (2006)</b>	<b>NPPH (2013)</b>	
<b>Land Use</b>	<b>Land Use</b>	<b>Land Use Modifiers</b>
Crop Hay	Crop	Irrigated Grazed Wildlife
Grazed Range	Range	
Pasture Native/Naturalized Pasture	Pasture	
Grazed Forest Forest	Forest	
Headquarters	Farmsteads	
Mined Natural Area Recreation Watershed Protection Wildlife	Other Rural Lands	
Urban	Developed Land	
Water	Water	

Questions?

# What's New in Toolkit 7.0?

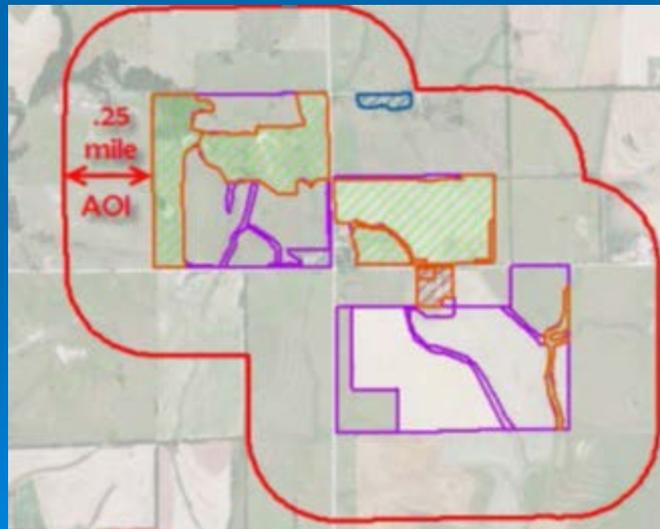
1. Connects to the new National Planning and Agreements Database (NPAD)
2. Eliminates pancaked Planning Land Units (PLUs) in the conservation plan
3. Implements new Land Use designations and Land Use modifiers
4. Integrates Easement Boundaries into the Active Land Unit Layer
5. Requires digitizing or copying boundary of practices into the Practice Layer

# What's New in Toolkit 7.0?

6. Integrates geospatial services by utilizing web map services (WMS)
7. Removes manual Performance Results System (PRS) reporting
8. Implements entering additional practice information to track Identified Priorities for Working Lands for Wildlife
9. ProTracts program codes are not selectable when scheduling conservation practices; everything will be planned under CTA-General.

Questions?

# Working with the Area of Interest (AOI)

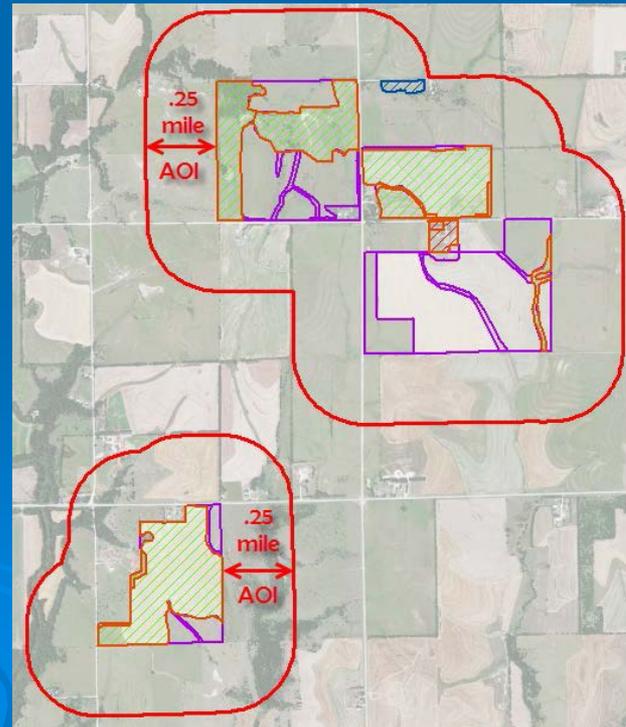


# Working with the AOI

Toolkit 7.0 enforces overlap rules for PLUs using an Area of Interest (AOI).

When an existing plan is checked out in Toolkit, the system automatically generates an AOI layer by selecting all PLUs bound to the PLAN and buffering .25 mile.

If PLUs are not adjacent, multiple AOI polygons will be created that are all buffered .25 mile around PLUs



# Working with the AOI

- Toolkit 7.0 requires all PLUs to be created and edited within an AOI.
- When the AOI is created, the system will return all land units from within and outside the selected plan.
- PLU geometry within the AOI that are outside the plan are read only and cannot be edited.
- PLU geometry within the AOI are used for enforcing overlap and displaying PLUs from other plans by selecting and reviewing PLU attribute information.
- In new plans there will be an AOI layer that is empty until the planner adds an AOI boundary using the AOI Tool in Arc Map that allows the planner to Add New AOI.

# Working with the AOI

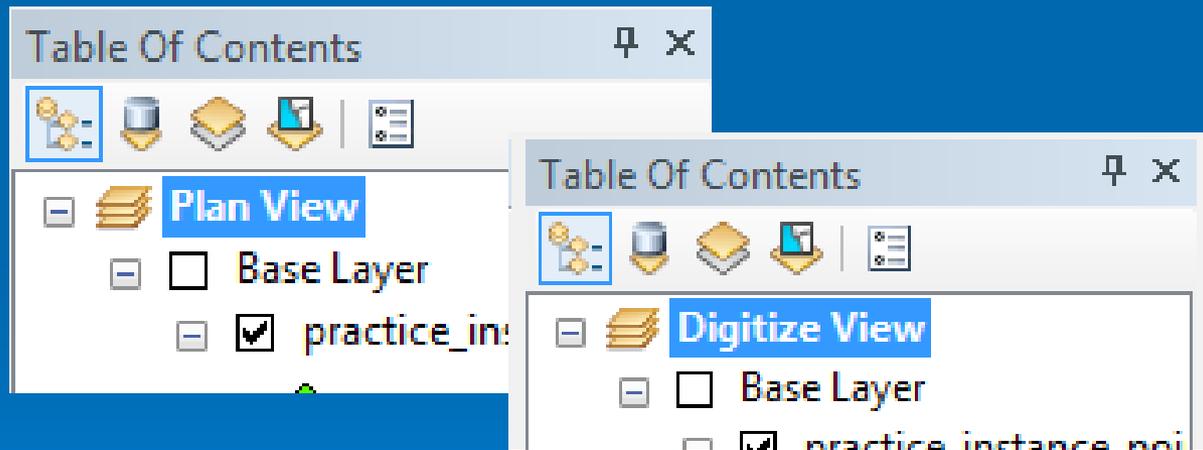
- The AOI is editable by the planner from Arc Map by using the AOI Tool and selecting either Extend AOI or Add AOI. Selecting the Add AOI button allows the planner to draw an AOI using a freeform polygon shape.
- If the AOI is expanded in ArcMap, but no land units are added the AOI is returned to the original buffer when the plan is checked out again.

# Working with the AOI

- When the planner submits a AOI Request, the AOI shape will be sent to NPAD and intersected with the active PLU layer.
- The NPAD system will return the entirety of the set of PLUs requested that intersect the AOI bounding box requested by the planner.
- If the planner tries to draw or copy a PLU outside the AOI the system will return a message to the planner to draw or expand the AOI.
- In the AOI tool the planner has the option of checking a box to indicate if the PLUs requested should contain the PLU Legacy layer in addition to the default of the Active PLU Layer.

Questions?

# Toolkit Views



# Toolkit Views

## Views

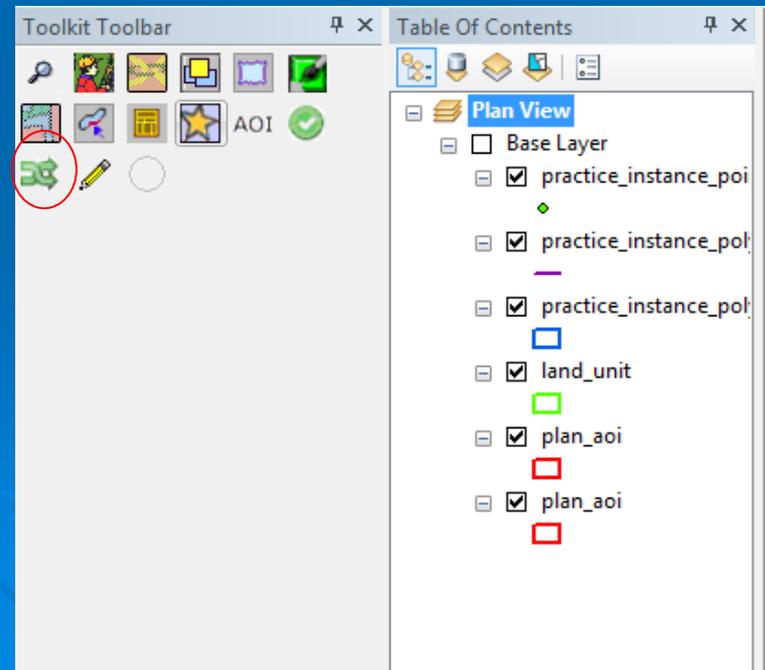
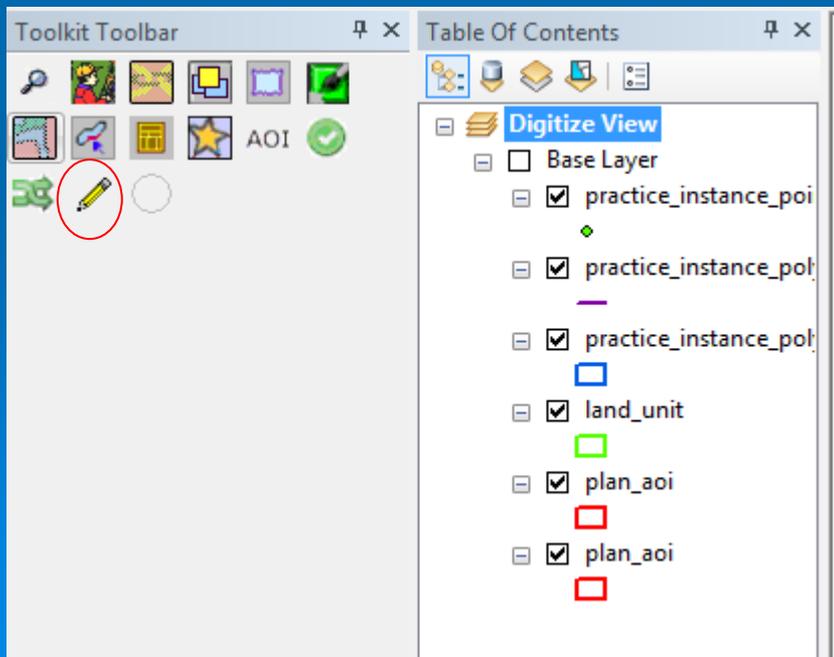
There are two views that are used to display the Conservation Plan.

- **Plan View** (current functionality) is the default set in Arc Map that displays the PLUs in a yellow outline. This view is primarily used for viewing, printing and displaying the plan boundaries.
- **Digitize View** (new functionality) is the view that displays the PLUs by the geometry status codes. This view is primarily used when using the Land Unit Editor tool and the Check In tool.

# Toolkit Views

There are two ways to change views.

- On the Toolkit toolbar click the **Toolkit Digitizer tool**  button to go to from the Plan View to the Digitizing View.
- To toggle back and forth from the Digitizing View to the Plan View click the **Change Views**  button on the Toolkit toolbar.



# Toolkit Views

Plan View

Digitize View

Table Of Contents

- Plan View**
- Practices (lines)
- Practices (points)
- Practices (polygons)
- Land Unit Topology
- Consplan
- Active PLUs
  - <all other values>
  - Plan
  - Locked
  - Easement
  - Draft
  - Sketch
- Legacy PLUs
- AOI
- Base Layer



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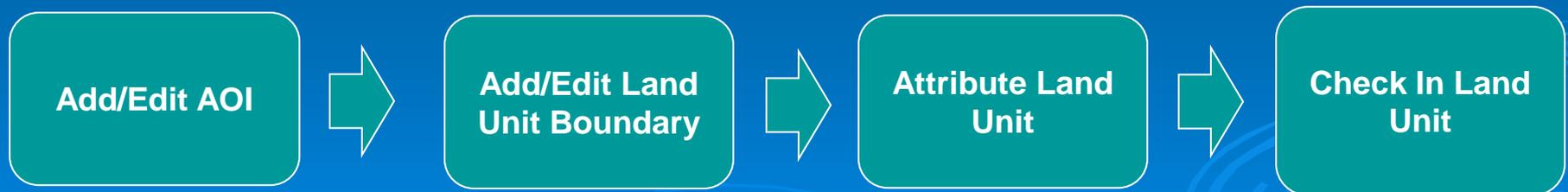
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  - Plan
  - Locked
  - Easement
  - Draft
  - Sketch
- Legacy PLUs
- AOI
- Base Layer

Questions?

# New Business Rules for PLUs

To add or edit a PLU, planners will follow these steps in this order:

1. Add or Edit the AOI and check revised AOI
2. Add or Edit the PLU boundary within the AOI
3. Attribute the PLU
4. Check-in the PLU to NPAD



# New Business Rules for PLUs

1. A PLU can be associated with only one conservation plan.
2. The association between a PLU and a Conservation Plan cannot be deleted if the PLU is *Locked* or is an *Easement* (Future release will allow PLU to be transferred to another plan).
3. PLUs have to be created using an approved method
  - Planners have the option to digitize, GPS, or copy the shape of the PLU.
  - Planners are no longer able to use the Land Units tab to create unmapped fields.
4. A PLU can have only one land use, but may have zero, one, or all planned land use modifiers.

# New Business Rules for PLUs

## Land Unit Geometry Status

- The Land Unit Geometry Status displays the current status of the land unit in Arc Map.
- The Land Unit Geometry Status can only be seen by using the Digitizing View in Arc Map.
- The Toolkit PLU Status Designations are:
  - Plan
  - Locked
  - Easement
  - Legacy
  - Draft
  - Sketch
- Each geometry status is defined in the following slides.

# New Business Rules for PLUs

Symbol	Layer	Geometry Status	Definition
	Consplan	Plan	These land units are in the Active PLU Layer and do not have any errors that need corrections. These land units are not linked to a ProTracts contract and are therefore editable in the Consplan.
	Active PLU		

# New Business Rules for PLUs

Symbol	Layer	Geometry Status	Definition
	Consplan	Locked	These land units are in the Active PLU Layer and are locked. These land units are linked to a ProTracts active contract and cannot be edited in the Consplan Layer unless the contract is modified in ProTracts or the contract is no longer active in ProTracts. Land Units in the Active PLU Layer are not editable in Arc Map but are used for enforcing rules for not allowing overlap on land units.
	Active PLU		

# New Business Rules for PLUs

Symbol	Layer	Geometry Status	Definition
 	Consplan Active PLU	Plan Easement	These land units are in the Active PLU Layer and are associated to a closed easement boundary. These PLUs do not have overlap errors and they cannot be deleted in Toolkit.

# New Business Rules for PLUs

Symbol	Layer	Geometry Status	Definition
	Consplan	Legacy	Legacy land units are in the Legacy PLU Layer and may or may not have errors that need corrected.
	Legacy		Legacy Land Units are displayed for reference information separately from the Consplan and the Active PLU layer.

# New Business Rules for PLUs

Symbol	Layer	Geometry Status	Definition
	Consplan	Draft	Draft land units are in the Active PLU Layer and may have errors that need corrected if future practices need to be planned.
	Active PLU		<p>Practice cannot be planned on Draft PLUs.</p> <p>Draft PLUs must be corrected and re-checked in and be in the Plan geometry status before a practice can be planned.</p>

# New Business Rules for PLUs

Symbol	Layer	Geometry Status	Definition
	Consplan	Sketch	<p>A PLU in Sketch Geometry Status is a new land unit that has been created but has not been checked in to the Active PLU layer to confirm it does not have errors.</p> <p>Sketch PLUs must be attributed and Checked In to the Active PLU layer and must be in the Plan status prior to planning practices.</p> <p>If a Sketch PLU fails overlap at check in the geometry status will change to Draft.</p>
	Active PLU		

Questions?

# Practices

1. A practice must be associated with at least one planned land unit.
  - If a practice is located entirely outside the perimeter of a client's PLUs, the planner must link the practice to at least one of the client's PLUs. This works the same as in Toolkit 6.0.
  
2. A practice associated with a financial assistance contract cannot be archived, deleted, or edited.
  - Deleting and editing is done in ProTracts through a contract modification.

# Practices

3. Practices can only be planned or certified based upon the following PLU geometry status rules

Planning Land Units in CST 7.0			
PLU Geometry Status	Geometry Status ID	Can Plan a Practice	Can Certify a Practice
Sketch	1	N	N
Plan	2	Y	Y
Draft	5	N	Y
Legacy	5	N	Y
Locked	8	Y	Y
Orphan	10	N	N

# Practices

4. All practices must have a spatial component.

- Planners have the option to digitize, GPS, or copy the shape of the PLU for a planned practice with its standard geometry (point, line or polygon).

5. Recurring Practices allows the same practice code to be scheduled multiple times on the same land unit.

- Recurring practice are unique records in NPAD that are reportable for performance.
- Recurring practices will have the same attributes as all other practices.
- Recurring practices geometry will be duplicated by the planner scheduling them on the practice schedule tab.

# Practices

6. Practice digitizing tools will permit planners to digitize in the correct geometry type.

- The following matrix is used to default to the correct geometry type based upon the practice unit that is used for performance reporting and is the standard unit in the Conservation Practice Standard (CPS).

Point Geometry	Line Geometry	Polygon Geometry
No	Mile	Acre
Ani Unit	Ft	
Ac-ft	Linear Ft/Yr	
Cu ft		
		Sq ft

# Practices

7. The below ProTracts programs will not be displayed in Toolkit for selection.

- EQIP- Environmental Quality Improvement Program
- WHIP- Wildlife Habitat Incentives Program
- AMA- Agricultural Management Assistance
- AWEP- Agricultural Water Enhancement Program
- CBWI- Chesapeake Bay Watershed Initiative
- EQIP GLRI - Great Lakes Restoration Initiative
- WHIP GLRI – Great Lakes Restoration Initiative

8. The Toolkit User can change a non-ProTracts program to a different program, as needed.

# Practices

9. ProTracts will populate the practice's program column (e.g. changing the CTA-General to another program) when the contract is obligated.
10. If the contract is cancelled or modified, ProTracts will make appropriate updates to the practice program.

Questions?

# Preparing for Data Migration and the Toolkit Update

January 28, 2014 – Check in all customer folders by 8:00 pm MST.

January 29 – February 3, 2014 – Users must not log into Toolkit and some ProTracts features will be disabled.

February 4, 2014 – After I let you know, users may begin using Toolkit and Toolkit linked features in ProTracts. Toolkit 6.x will no longer be functional.

**Please WAIT to use Toolkit 7.0 until I tell you it's ready.**

# Preparing for Data Migration and the Toolkit Update

During the Toolkit shutdown period some ProTracts functionality will be disabled.

Please follow the instructions that Cheryl and Mary have provided.

# Where to find guidance documents

## USDA Connect Programs Community



A sub-community for Toolkit has been set up under the Programs Community in USDA Connect.

- Short videos that demonstrate key tasks
- Toolkit 7.0 Task Guide

## WY eFOTG, Section I:

- Toolkit 7.0 Task Guide
- Pre-Deployment Powerpoint

**Files**

Successfully uploaded Toolkit7\_TaskGuidev1.2\_January\_13\_2014.docx

Share Files

 **Toolkit7\_TaskGuidev1.2\_January\_13\_2014.docx**  
Shared today at 8:30 AM

 **NB 180-14-1.pdf**  
Shared Jan 7 | 88 downloads

**Wiki**

Create a Wiki Page

 **Task Guide 8I Schedule Priorities from Practice Schedule**  
JENNIFER ZWICKE | Jan 9

 **Task Guide 8J Practice Narratives**  
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 **Task Guide 5H Merging PLUs**  
JENNIFER ZWICKE | Jan 9

 **Welcome**  
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 **USDA DW Editing Basics**  
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Questions?

# Toolkit 7.0 Live Demo