

American Tree Farm System® Certification and Inspection Tracking System User Guide

For more tutorials and guidance visit Leader's Only on http://www.treefarmystem.org/leadersonly

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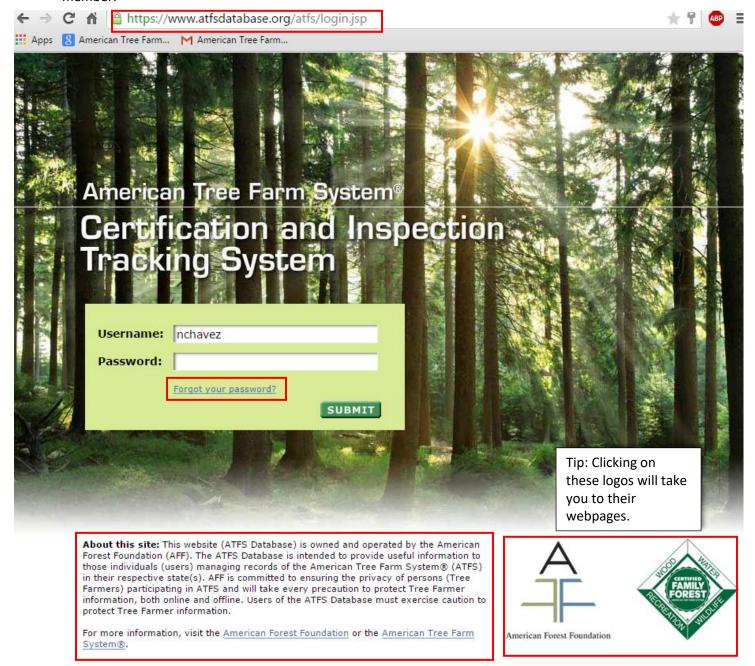
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Signing into ATFS

The webpage where the ATFS database is housed is <u>www.atfsdatabase.org</u>. In order to use this page you must have your own username and password. Do NOT use someone else's login information.

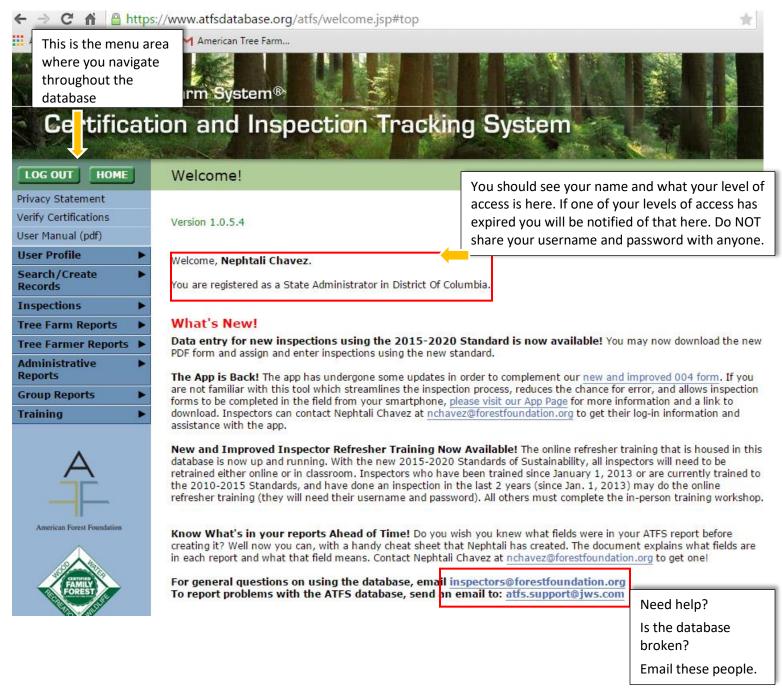
- If you need an account, please reach out to an ATFS national staff member.
- If you know that you have an account, but cannot remember you password, you can click "Forgot your password?" This will display your hint question and you must answer your hint question correctly to get a new password.
- If you cannot remember the answer to your hint, get in touch with your state committee or an ATFS staff member.



Introduction to ATFS Home Page

When logging into www.atfsdatabase.org, this is the home page that you will see. If you are logging in for the very first time, you will need to agree to comply with our non-disclosure agreement.

Based on the level of access that you have (inspector, district chair, state administrator, etc.) you will be able to see more or less options.



Capabilities of Each User Access Role

Everyone who has a login for the database has a certain access role that will determine what features of the database are available. The roles in the table below are the most common and roles can change at any time.

Capabilities of each role	State Viewer	Approver	Facilitator	Inspector	District Chair	State Admin
Verify certifications	✓	✓		✓	✓	✓
Create Database Users						
Disable Users						✓
Delete Records						
Search Records	✓	✓		✓	✓	✓
Create Records					✓	✓
Edit Individuals/Properties				√ **	✓	✓
Edit Insp. Training & Password			✓	(change Pw)	✓	✓
Assign Inspections		✓		**	✓	✓
View/Edit/Submit Inspections	(Can view)	(Can view)		✓	✓	✓
Approve Inspections		✓			✓	✓
Print/Create Inspection Forms				✓	✓	✓
Tree Farm Reports					✓	✓
Tree Farmer Reports						✓
Inspector Reports				✓		✓
Administrative Reports						✓
Access Online Training			✓	✓	✓	✓

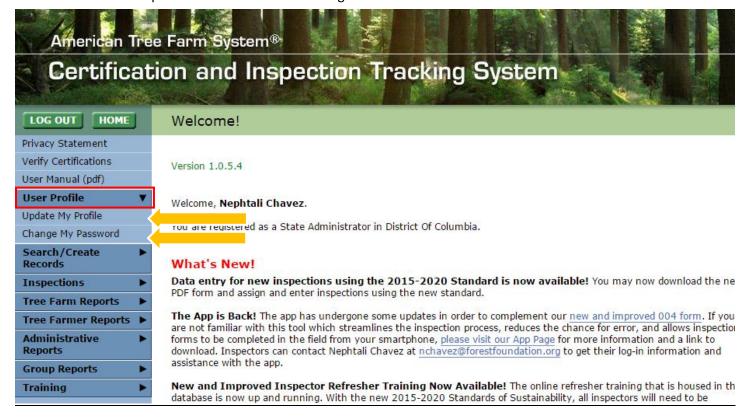
^{**}Inspectors can edit/assign themselves to a property if they were the last person to inspect that property (according to the database). They can edit any individual's contact information.

How to update your profile and password

Your contact information is stored in the ATFS database and can be updated at any time. If you are granted access to www.atfsdatabase.org, you will be given a username and password that can be changed at any time.

To update your profile or password:

- 1. On the menu to the left side of the screen, click user profile so that it expands. You will see "Update My Profile" and "Change My Password" underneath
- 2. To update contact information, click "Update My Profile"
 - a. When updating your profile, you may erase and replace any relevant contact information.
 - b. Fields marked with asterisk (*) are required.
 - c. Be sure to hit the update button, followed by the confirm button in order for changes to be saved.
- 3. To change your password or login hint, click "Change My Password"
 - a. You will need to type in your current password followed by the new password.
 - b. Update your hint question and answer, if needed. You will need to know the answer of your hint in order to retrieve your forgotten password.
 - c. Click Update in order to save the changes.



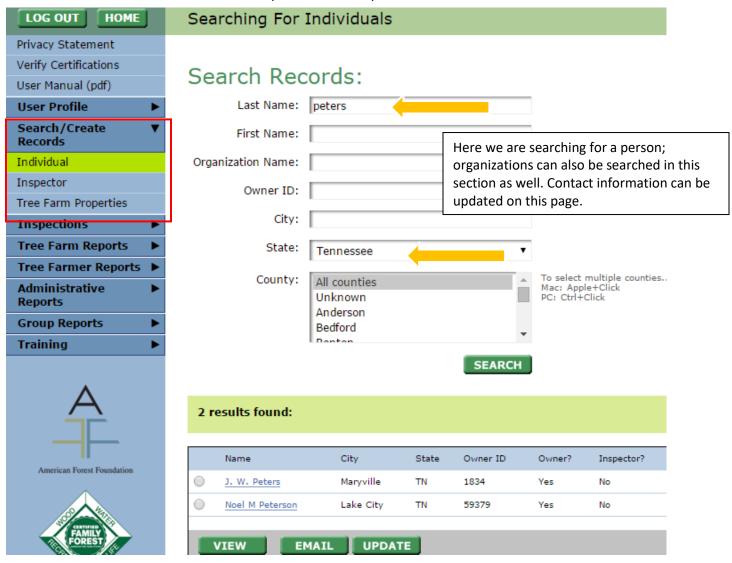
How to Search for Records

A large portion of work done the in the database is just being able to find a person or property. Under Search/Create Records, you have the option to search for individuals (any person or organization), inspectors, and properties.

Each search menu has many optional fields to begin your search by. In the example below, I am searching for a landowner with the last name peters who lives in Tennessee. If I just enter the last name Peters, in the last name field, I would get 250 results (this is the max number of displayable results), but if I include Tennessee as the state, my results are narrowed down significantly. The number of results returned depends on the level of detail entered in the search.

Search Tips

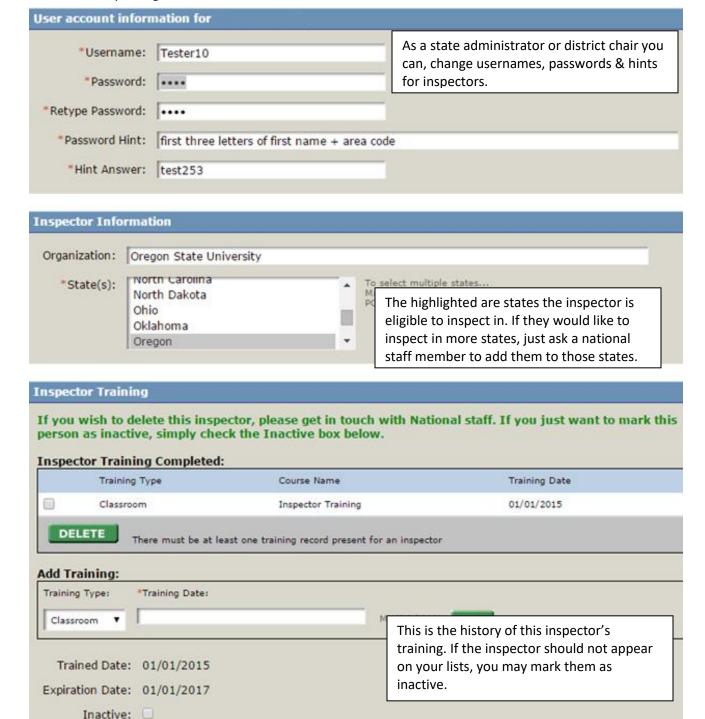
- 1. The name text fields use an automatic "wildcard" or "wild character" meaning partial information can be used. When searching for a name or organization, the full name does not need to be entered. The Tree Farm Number does not automatically have a wildcard, but you can use the % symbol around the number being searched.
- 2. Keep in mind that many people have nicknames when searching for someone. Searching by nickname in the first name field will also search for that person by their nicknames.
- 3. Anything typed in to the last name field, will also search within organizations, because many organizations use the last name of the owner and vice versa.
- 4. Sometimes, individuals live in one state and owner property in another. When doing a search for a record, "All States" should be left in the search field. For example, if you search for John Smith who has a property in Alabama, you may not find him if he lives in Florida.
- 5. Keep your searches **broad.** The less information you enter the more likely your will find the person with the weird nickname or shortened name (Tom vs Thomas.)



Searching for an Inspector

State administrators and district chairs that are interested in determining when an inspector was trained or what their username and password are will need to find the inspector record first. Other types of user roles would not be able to see this level of detail (see <u>Capabilities of each role</u>).

- 1. Under Search/Create Records, choose inspector
- 2. Search for the inspector by any of the available fields. If you know the inspector's ID number that can be used in the Member ID field.
- 3. When your result(s) appear, choose the inspector of interest, by clicking the circle next to their name.
- 4. Click the green Create/Update button. This will expand the page and open the record (see image below). Be sure to save any changes made.



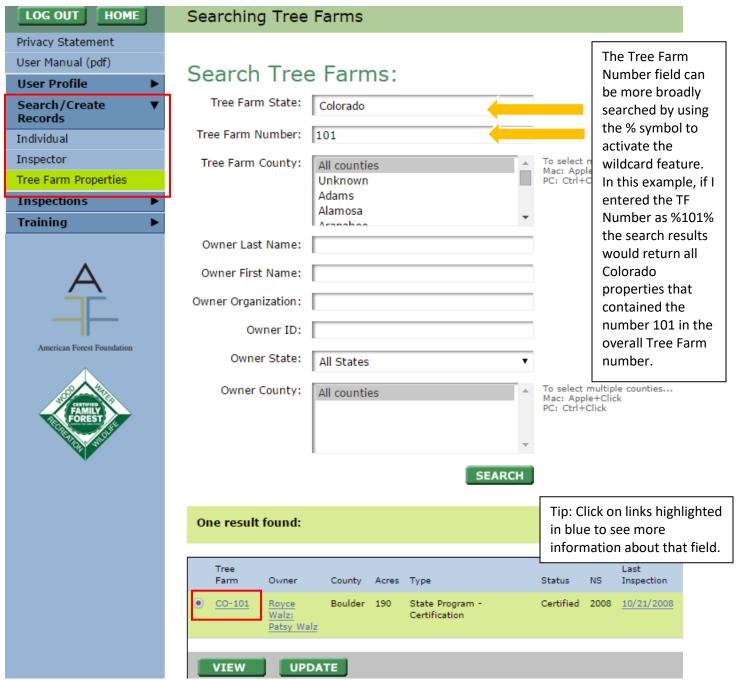
Searching for a Tree Farm

Reasons for searching for a Tree Farm:

- Updating property information including acreage, location, ownership, contacts (only certain users can do this)
- Need property information
- Assign the property to an inspector (only certain users can do this)
- Determine certified status
- View the last inspection or last inspector

To search for a Tree Farm:

- 1. Under Search/Create Records, choose Tree Farm Properties
- 2. Several search field options will appear. The easiest way to find a property is by entering the state and that unique number associated with the property. You can also search by the owner's name.
- 3. When your result(s) appear, choose the property of interest by clicking on the property number.



How to Edit Records

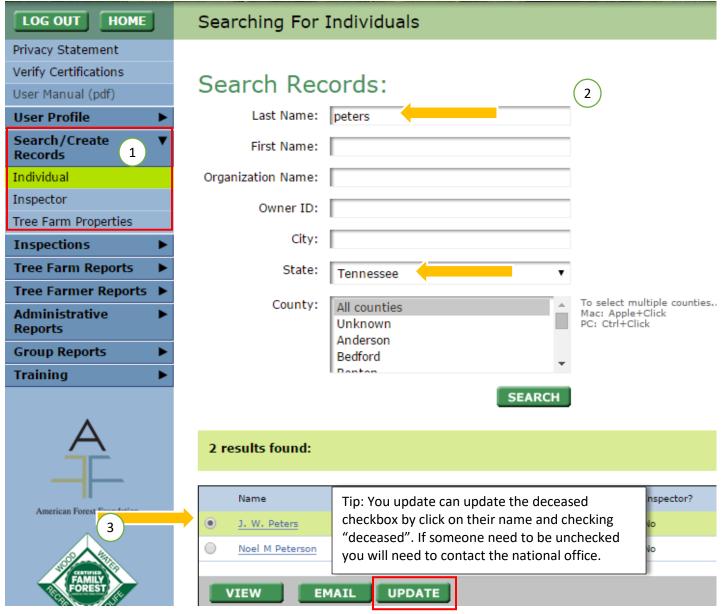
Once you have found the record that needs adjustment you can edit it several ways. Hyperlinks to editing records can be found throughout the database. Clicking on these links opens a new window that allows you to edit the record.

- What can be edited:
 - Contact information
 - Marking individuals as deceased
 - Property details
 - Inspection (004) details if done within 6 months of submission
 - Inspector's training details
 - Marking an inspector as inactive

Keep in mind editing is different from deleting. You cannot delete anything in the database, to do that get in touch with national staff.

Editing Individuals

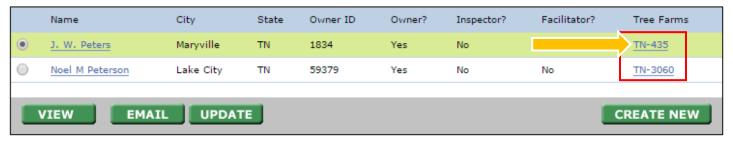
- 1. Search for the individual or organization you'd like to edit by going to Search/Create records → individual. Keep in mind that people sometimes have several nicknames they could be under. **Search Tips**
- 2. Once located, select the record to edit by clicking the circle next to their name.
- 3. Click update to access and update their contact information, be sure to confirm changes.
- 4. *Alternative method: Once the record is located, click on their name to open the editable contact information.



Editing Tree Farms Method 1

Under Search/Create Individuals → individuals you search for people or organizations. In the search results you will see what Tree Farm properties the individual is listed as the owner of.

- 1. Search for the individual that is owner of the property of interests
- 2. In the search results, click the Tree Farm linked to their name. This will open the details of the property that can be edited.
- 3. Confirm changes



Editing Tree Farms Method 2

- 1. Under Search/Create Records, click on Tree Farm Properties.
- 2. Find the Tree Farm of interest by using any of available search fields. Remember the search tips.
- 3. Select the specific property of interest by clicking on the circle next to the Tree Farm number.
 - a. Here you could also just click on the Tree Farm number directly, this is a hyperlink.
- 4. Hit Update

Editing Inspections

Inspections can only be edited within 6 months of the inspection. If an inspection needs to be editing after that time frame, get in touch with staff at national.

- 1. Under Inspections → View/Edit/Submit inspections search for the property that was inspected
- 2. Once found, select the inspection by clicking the circle next to the Tree Farm number.
- 3. Hit next to open up the inspection details.

2 results found: Tree Inspection Inspection Version Farm County Acres Status NS Date Status Editable? Owner Inspector Waldo 33.0 Certified 05/21/2015 Chavez. Approved 0115 Yes Nephtali Tompkins ME-55 Ellen W Waldo 33.0 Certified 11/01/1996 Potter, Harry Approved 0699 No Tompkins CREATE PDF VIEW NEXT Click to download Inspection Forms in PDF Format for Assigned inspections only (only edit using Adobe Reader)

Editing Inspector Training Details

- 1. Search for the inspector under Search/Create Records → Inspector.
- 2. Once found, select the inspector by clicking the circle next to their name.
- 3. Click Create/Update next to their name and enter or update their training.

How to Create Records

Only State Administrators or District Chairs can create new records.

Information needed to create a new Person/Organization:

- Contact information
- Keep in mind creating is different from replacing/deleting. You cannot delete anything in the database, to do that get in touch with national staff.
- Do not overwrite an existing record with a new person's name that leads to issues with the database.

Information needed to create new inspectors:

- Inspector's training details
- Their contact information

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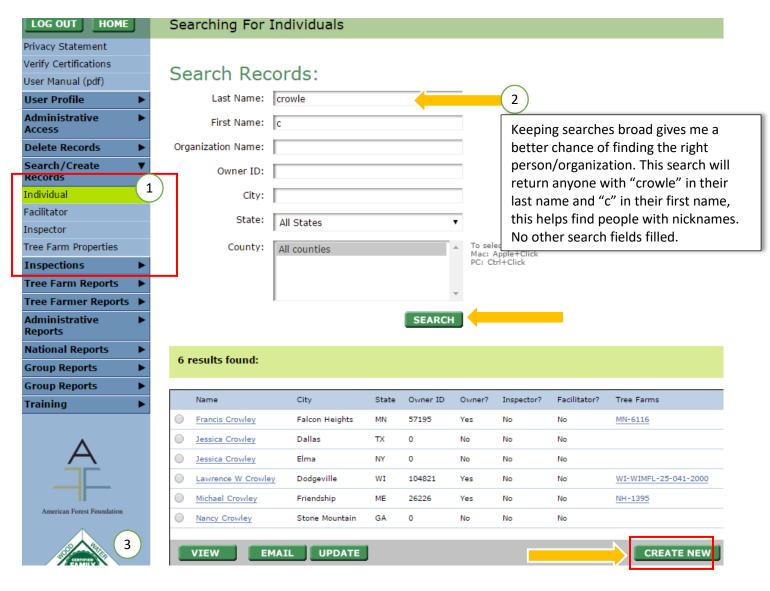
- 1. Creating/Updating Inspector training
- 2. Creating Individuals
- 3. Creating Tree Farms
- 4. Creating Inspections

Creating Inspectors or updating their training

- 1. Search for the inspector under Search/Create Records → Inspector. Note: the person has to exist in the database already, if they don't <u>create the individual first</u>.
- 2. Once found, select the inspector by clicking the circle next to their name.
- 3. Click Create/Update to enter or update their training.
- 4. If it's a brand new inspector, you will need to create a username and password for them.
- 5. Save your changes.
- 6. Be sure to update any contact information changes.

Creating Individuals

- 1. Search for the individual or organization you'd like to edit by going to Search/Create records → individual. Keep in mind that people sometimes have several nicknames they could be under, so doing a broad search is best.
- 2. You shouldn't be able to locate the person of interest, because they don't exist yet.
- 3. Hit Create New enter the individual or organization's contact information.
- 4. Tip: Do not put multiple people in the same record (Joe & Mary) and try to avoid nicknames or shorthand names for the first name. If you'd like to address multiple people in 1 record for mailing purposes, you can use the organization line (The Pearson Family, or Joe, Mary, & Beth) so that when mailing are done, that option is available.



Duplicating an Individual's record

If you have multiple owners or contacts for a Tree Farm, it can be very repetitive to create a new record for all of them. There is a "duplicate" button that can copy an existing individual's contact information and associated Tree Farms. This allows for quick additions of spouses, siblings, etc. who have the same or very similar contact information. This feature will work even if there are no associated Tree Farms and you have the option to not copy Tree Farms.



- Search for the record you want to duplicate un the search/create records → individuals menu
- 2. Select the record to duplicate by hitting the circle next to their name
- 3. Click duplicate and Fill in the name of the new person/organization you want to create. The contact information will be prefilled for you, but you can edit it.
- 4. Hit create

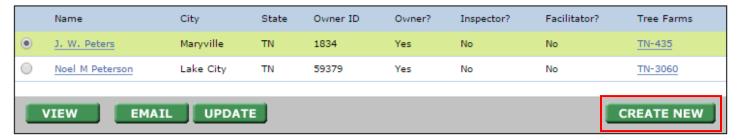


Information needed to create new Tree Farms:

- Property details such as acreage, ownership type, location.
- Owner needs to already exist in database

Creating Tree Farms

Under Search/Create Individuals → Tree Farm Properties you can immediately create a new property if you know for sure that it doesn't exist yet. If unsure, you can do a search by owner's name and see if anything comes up.



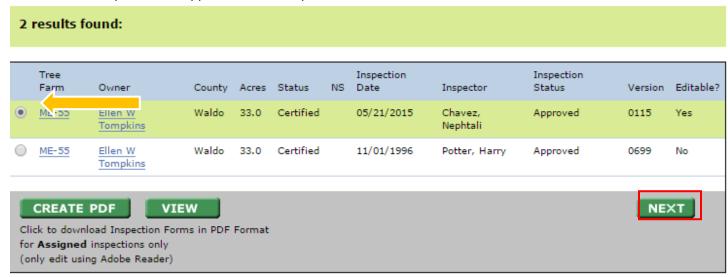
- 1. On the first page of creating new Tree Farm you will need to identify who the owners and contact persons are. Search for them in the available search fields.
- 2. Second page: enter the TF # and details about the property. Acreage and location must be added in the sub table at the bottom of the page, by clicking "create new"
- 3. Save any changes.

<u>Information needed to create new inspections:</u>

Inspection details (004 form)

Creating Inspections

- 4. Assign inspector to property.
- 5. Under inspections → view/edit/submit inspections, search for the property that was inspected.
- 6. Select that property by clicking the circle next to the TF#, and the hit next.
- 7. From there, all 004 information can be entered. If you save and exit midway, the inspection will remain as a draft.
- 8. Submit inspection for approval when complete.

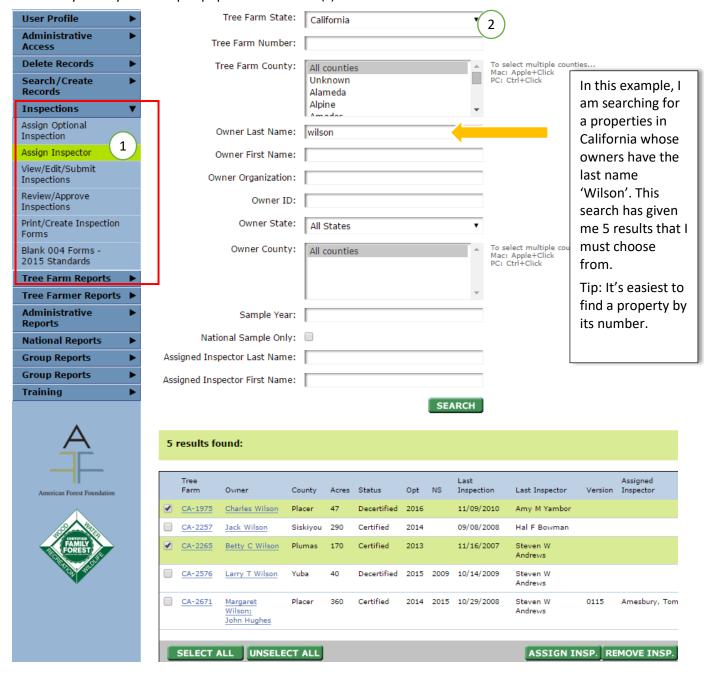


How to Assign Inspections

Each ATFS inspection must be completed by a qualified inspector who has received the latest training and has had this training entered into the database. There is more than 1 way to assign an inspector a Tree Farm.

Assigning Inspections Method 1

- 1. Under inspections, click on Assign Inspector
- 2. Search for the Tree Farm you wish to be inspected with the available search fields.
- 3. If multiple Tree Farms fit into your search criteria you will get multiple results, check off the Tree Farm(s) of interest.
- 4. Click Assign Inspector in the lower right corner. If an inspector is already assigned to the property, remove that inspector by clicking Remove Inspector.
- 5. A drop down list will appear with the names of eligible inspectors. Choose the appropriate name and click assign.
- 6. Confirm your choice.
- 7. Now you may create a pre-populated 004 form(s) for distribution.



Assigning Inspections Method 2

This method is quicker when assigning inspections one at a time. <u>Method 1</u> allows you to assign multiple inspections to an individual at a time.

- 1. Under Search/Create Records, select Tree Farm Properties
- 2. Search for the Tree Farm of interest
- 3. In the last column of your search results, you will see if the property is currently assigned. The inspector can be assigned by clicking the linked 'Assign' text. This will open a smaller window (make sure your pop up blocker isn't preventing the new window from appearing).
- 4. Choose from the eligible inspectors in the drop down list, click Assign and confirm your choice

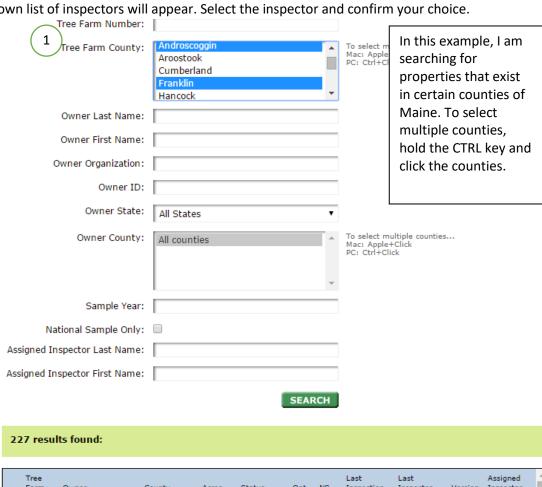
13 results found:

	Tree Farm	Owner	County	Acres	Туре	Status	NS	Last Inspection	Last Inspector	Assigned Inspector
0	AL- 12112	Merle Wilson	De Kalb	279	State Program - Certification	Certified		02/11/2011	Joann M Cox	None - Assign
0	AL- 12113	Chris Wilson	Barbour	314	State Program - Certification	Certified		02/11/2011	Joann M Cox	None - Assign
	AL- 12114	Warren Wilson	Crenshaw	80	State Program - Certification	Certified		02/11/2011	Joann M Cox	None - Assign
	AL- 12115	Bruce Wilson	Walker	15	State Program - Certification	Certified		02/11/2011	Joann M Cox	None - Assign
	AL- 12167	Mayton-Wilson Farm	Marengo	700	State Program - Certification	Decertified		12/06/2013	Sarah Crow	None - Assign
0	AL- 12260	John Wilson	Baldwin	614	State Program -	Unknown				Fields,
	VIEW UPDATE CREATE NEW									

How to Assign Multiple Properties to One inspector

Multiple Tree Farms can be assigned to one inspector, **BUT** the Tree Farms all have to have a field in common in order for them to appear in the same search result. This field can be a common owner, county, previous inspector or that all are tagged as required inspections.

- 1. Under 'Inspections' select 'Assign inspector'
- 2. Search for the properties you are looking for.
 - a. Example: You want to assign a specific inspector to properties in certain counties you'd search for all the Tree Farms in those counties. To select multiple counties, hold the CTRL key and click the county names.
 - b. Example 2: Searching by owner name would allow all properties owned by that person to appear and these can all be assigned to one inspector.
 - c. Note: If you leave all of the search fields blank the results will display the first 250 Tree Farms in your state.
- Select the Tree Farms you would like to assign the inspector to, click 'Assign Inspector' in the lower right.
- A drop down list of inspectors will appear. Select the inspector and confirm your choice.





How to Save the PDF 004 Form on Your Computer

The new writable PDF 004 can be found in many locations and the file can be saved on your computer for easy access. These instructions will vary by browser. Places where the PDF can be found include:

- Inspectors Corner: https://www.treefarmsystem.org/inspectorscorner
- ATFS database: www.atfsdatabase.org

When downloading the form online you can click on the link and in some browser the PDF will open in a new window. If you PDF opens in a new window you can save it by:

1. Search for the save icon (see examples below). sometimes you will need to hover your mouse in bottom left corner of the page until you see these icons:



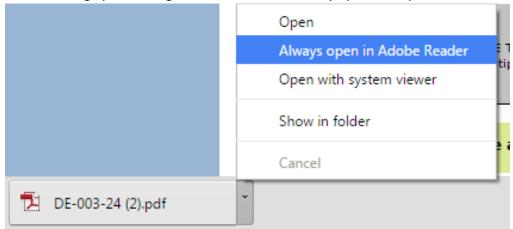
2. Click the Save (5th) Icon to open a saving window. Choose the location of where you want to save your file.

If the PDF doesn't open within your browser but instead opens automatically in adobe you can save it by:

- 1. Clicking on File → save as.
- 2. This will open a saving window. Choose the location of where you want to save your file.

If the PDF is downloaded by your browser but hasn't opened automatically, you may find it waiting to be clicked on in the bottom left corner of the page, this applies mainly to google chrome.

- 1. Click on the file on the bottom left and it will open.
- 2. Save the file
- 3. You can change your settings so that files automatically open. Example:



How to Download Multiple 004 PDFs from ATFS

The ATFS database now has the capability of downloading multiple assigned or unassigned pre-populated 004s straight to your computer. If you are downloading more than one of these forms at a time, it will be downloaded as a zip folder that once opened will contain all your files.

Method 1:

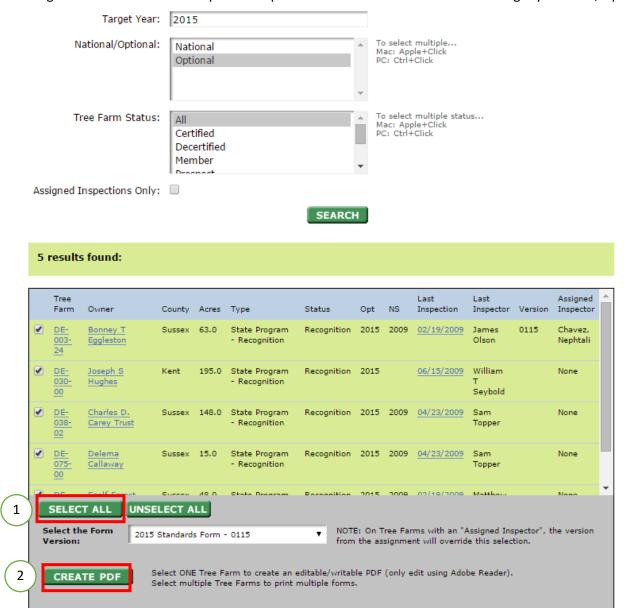
- 1. Log into ATFS database
- 2. Assign the inspections to the inspector(s) needed by going to "assign inspectors" under "Inspections"
- 3. One that same page, click Create PDF. You will find this create PDF button in several areas of the database.



Method 2

- 1. Log into ATFS database.
- 2. Go to Print/Create inspection forms
- 3. Enter the search criteria for the types of forms you are looking for. For example if you want to download all of the required inspections for that year your search criteria would be:
 - a. Tree Farm State= your state
 - b. Target year= current year
 - c. National/Optional= national
 - d. This would pull up the national sample for the year and you can download them all at once in a zip. If you wanted to download the optional samples that were designated for a year, then you would choose optional as your criteria
 - e. If you want to pull pre-populated forms for all of the properties that a certain person/organization owned then you would just search for that person/organization select all the results.
 - f. If you leave all of the search fields blank the results will display the first 250 Tree Farms in your state.

4. The image below shows the 2015 optional inspections for Delaware. I searched for Target year 2015, Optional.



- 5. Once the search results appear, Click select all, or the individual properties you need forms for.
- 6. Click create PDF
- 7. Save to your computer.
- 8. Open the zip.

How to Assign Optional Inspections

To assign an optional inspection year to a Tree Farm property

- 1. Click Inspections, which is located on the left side of your screen.
- 2. Click Assign Optional Inspection.
- 3. Type the Tree Farm Number, the name of the owner of the Tree Farm or any other available information of the Tree Farm that you would like to search for.
- 4. Click the Search button.
- 5. If the desired result is found, select the Tree Farm(s) by clicking on the boxes next to the
- 1. Tree Farm property and click the Assign Year button.
- 2. Note: If the desired result is not found, repeat the search using different search criteria or create a new record for the Tree Farm property.
- 6. To schedule an inspection of a Tree Farm property, consider the current inspection due date and select a new inspection due date from the drop-down list. Repeat this procedure for each Tree Farm property in the list.
- 7. Click the Assign button.

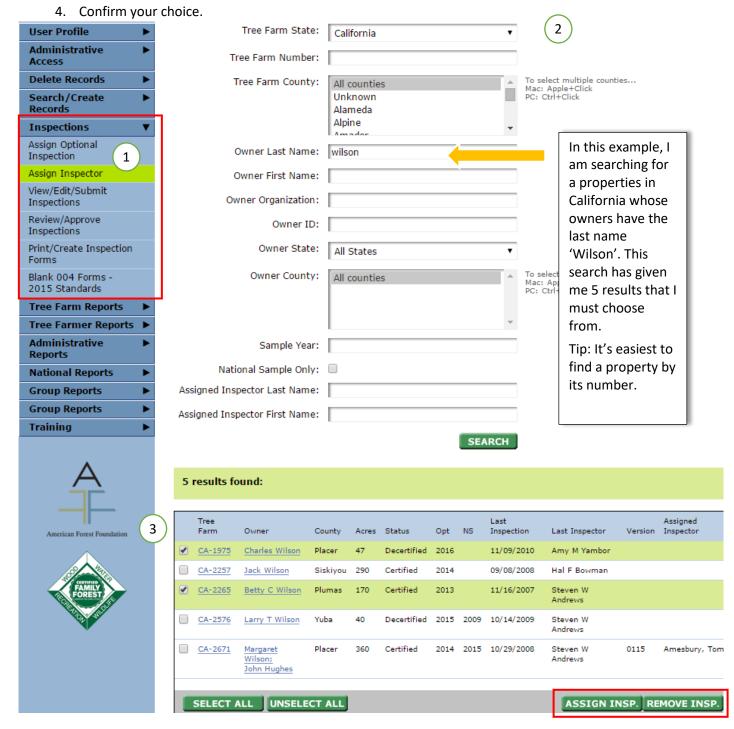
How to Enter Inspections

Each ATFS inspection must be completed by a qualified inspector who has received the latest training. The database will not allow an unqualified inspector to be assigned or enter an inspection in the database.

There are 3 phases of the inspection process.

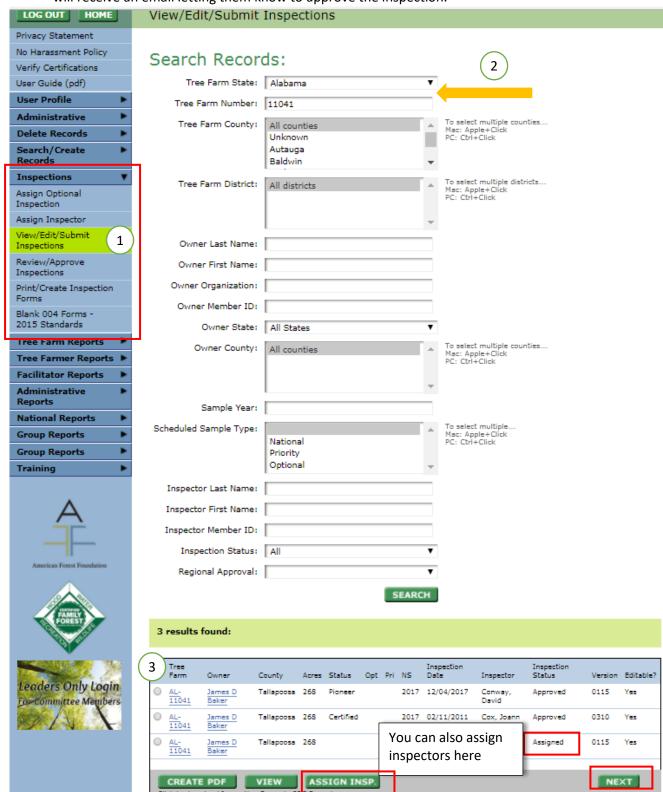
<u>Phase 1 Assignment</u>: if the inspector has not been assigned yet, this will need to be done before an inspection can be entered. **Note**: If an inspector is doing the assigning, she/he will only be able to assign themselves to a property if they were the last inspector.

- 1. Under inspections, click on Assign Inspector and search for the property that was inspected.
- 2. Select the correct Tree Farm(s) in the results
- 3. Click Assign Inspector in the lower right corner. Choose the appropriate name and click assign.



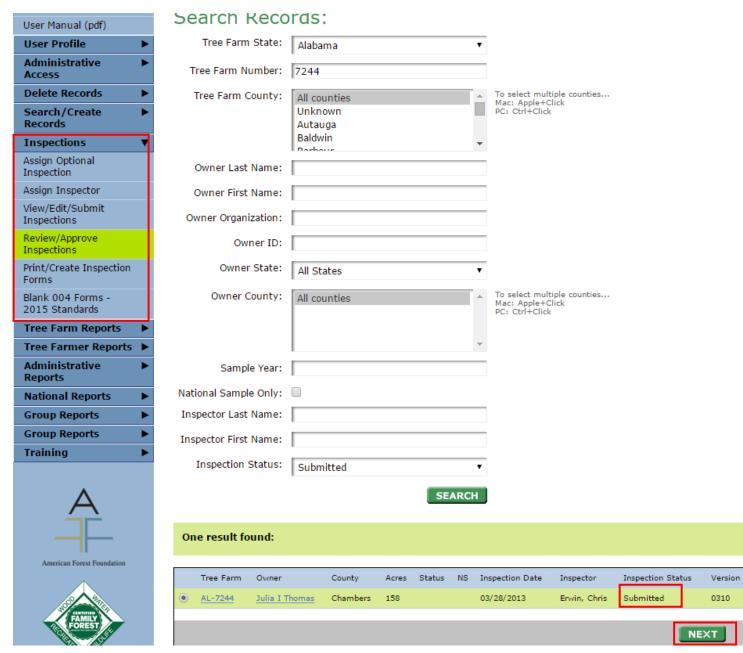
Phase 2 Entering 004 information: Note: you can only enter the 004 information for one property at a time.

- 1. Under inspections → View/Edit/Submit Inspections, search for the property that was inspected
- 2. If this property has been inspected multiple times you will see its past inspections, choose the record with an 'assigned' status.
- 3. Click next and begin entering the 004 information. Be sure to save your progress along the way.
- 4. On the final page, submit to the approvals person from your committee with the drop down list. This person will receive an email letting them know to approve the inspection.



<u>Phase 3 Approving the Inspection</u>: You can approve only if you are an approval person for your state committee and have that level of access.

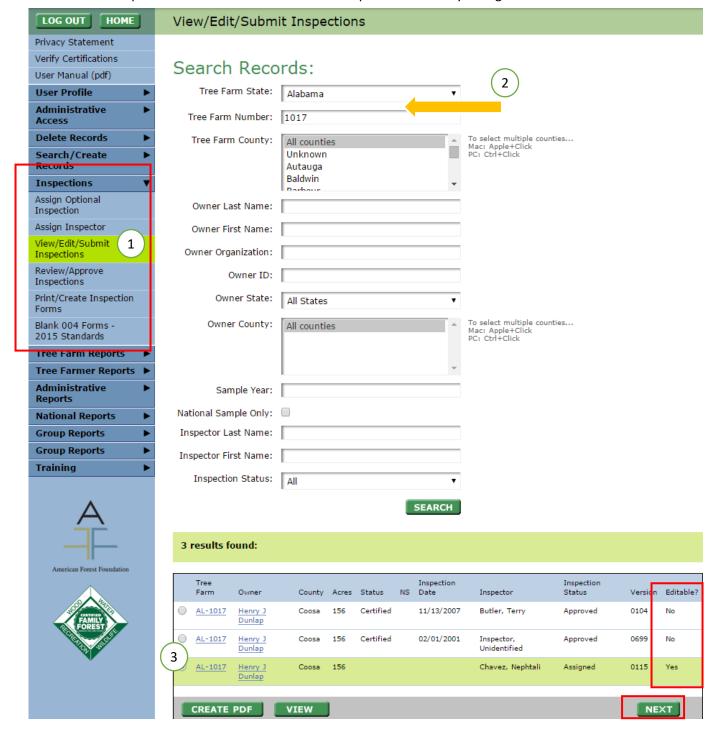
- 1. Under Inspections → Review/Approve inspections, search for the Tree Farm that needs an inspection approved.
- 2. In the search results, choose the correct property. It will have an inspection status of 'submitted'.
- 3. Click next to review the information that was entered.
- 4. If everything was entered correctly, then approve the inspection. This completed the process.



How to Edit Inspections

After an inspection has been completely entered and approved in the database, you may find that there was something filled incorrectly in the standards checklist. This would require that the inspection be edited. Only state administrators and district chairs with database access can edit inspections *and* inspections can no longer be edited 6 months after being approved.

- 1. Within the database, go to Inspections → view/edit/submit and search for the property with the inspection of interest.
- 2. The last column in the search result tells you if that inspection is editable (see image).
- 3. Select the inspection and click "next" to edit the inspection. Save any changes.



Generating Reports

State administrators, district chairs, and facilitators have access to certain reports. Of the list below, State admins can see all of the reports, while district chairs can only see Tree Farm Reports.

There are 4 overarching types of reports:

- Tree Farm Reports: A list of all properties in the database
- Tree Farmer Reports: List of all landowners in the database
- Administrative Reports: List of inspectors, facilitators, and miscellaneous info.
- Group Reports: List of the properties that belong in our Independently Managed Group (IMG) in your state. This will not apply to most states.

Facilitators can see a section called Facilitators reports. Here they can download reports on:

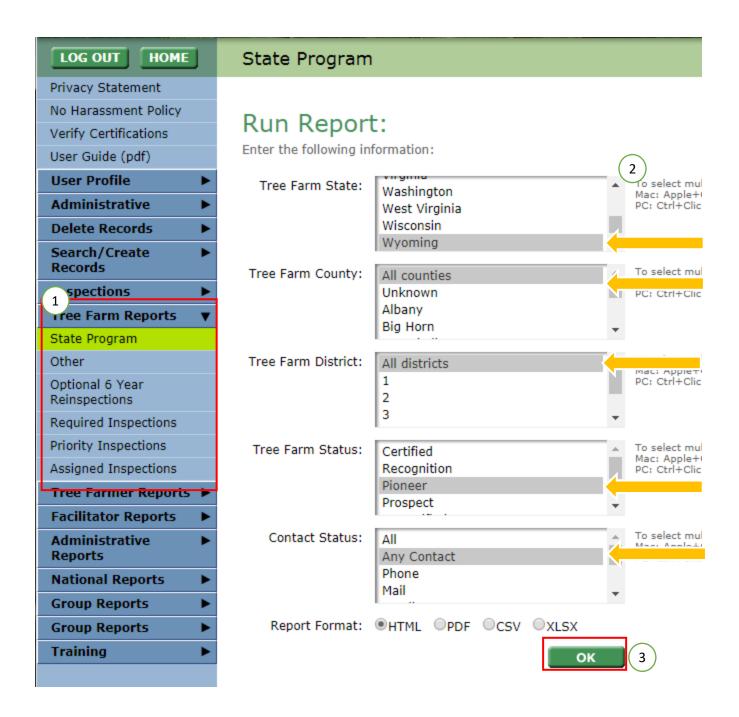
- Inspectors: See the roster of active, inactive and recently expired inspectors.
- Inspectors Activity: View inspector activities completed by inspector.
- Facilitators: Download a list of active facilitators.

There are also many ways to filter the report before downloading it. There may be more or less filters depending on the report, but in general, you can filter by:

- State
- County
- District Region
- Status
- Contact status

In this example, we will look at generating a list of all pioneer Tree Farmers in Wyoming. There are several filters where you can narrow down the report output.

- 1. Got to Tree Farm reports → state program
- 2. The filters applied here are State= Wyoming, county= all counties, District=2, Tree Farm status= pioneer, contact status = any contact, Report format= CSV.
 - a. CSV is just like excel format except without any font formatting. You cannot save any special fonts or colors using CSV, it will just be the pure numbers and words.
- 3. Click okay. From here the report can be further narrowed down using excel.

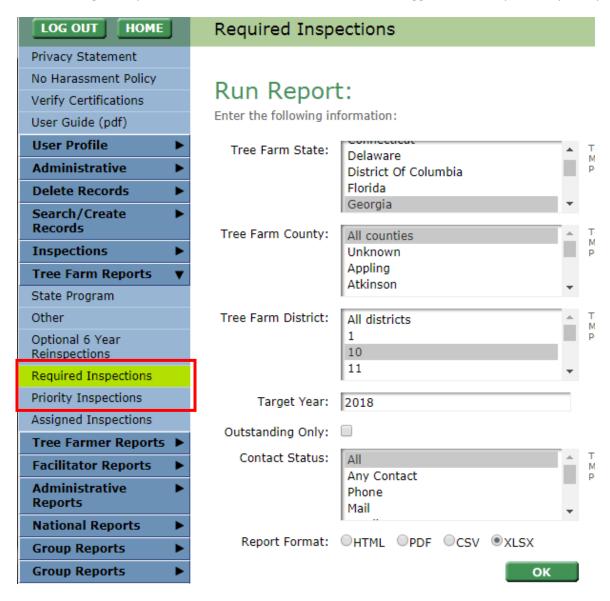


Downloading the Required and Priority Pioneer Sample List

Each year a set number of properties get randomly tagged for inspection, this is part of the ATFS internal monitoring and is a great way of reaching out to Tree Farmers. The size of the sample in your state is proportional to the size of your population relative to all other states. As a reminder, the priority pioneer sample is a random sample of your state's pioneer population (if any) to complete that year.

Note: to see this report you need to be a district chair or state administrator

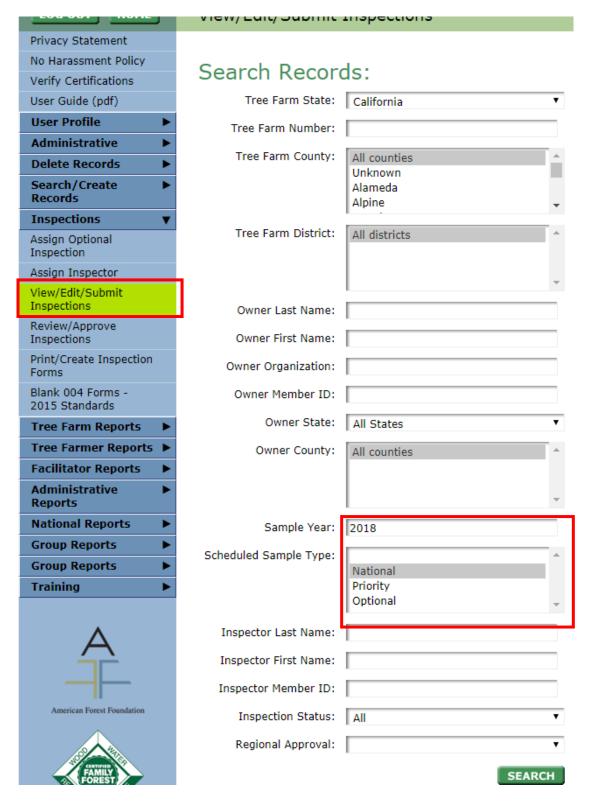
- 1. Log into www.atfsdatabase.org
- 2. On the left menu, go to Tree Farm Reports → Required inspections (Or priority inspections)
- 3. In the filter options select your state, all counties, and the current year. Be sure to uncheck outstanding only and all contact statuses.
- 4. Choose your output method.
 - a. HTML= View results as a webpage
 - b. PDF= Get results as a PDF
 - c. CSV= Get results in a Comma separated file which can be opened in excel
 - d. XLSX= Get results in an Excel 2007 or newer format
- 5. You will get a report of all of the Tree Farms that have been tagged for the required or priority



Alternate Method

This is a different option that will work for all database users. This option does not allow you to download the results.

- 1. Log into www.atfsdatabase.org
- 2. On the left menu, go to Inspections → view/edit/submit inspections
- 3. In the available search fields, the sample year is the year of interest, and you can choose to display the national (required) or priority sample. You can also view any optional (scheduled) inspections.



Understanding Various Reports

<u>Tree Farm Reports</u>: These reports will give you various pieces of information regarding properties that are in various programs of Tree Farm and stages of our program.

Note: The owner that is associated with each Tree Farm that is in this report is only the primary owner, not all associated owners.

Details that will be list in these reports include:

- Property information such as: State, Number, Tree Farm Name, Tree Farm Status, County, Acres, Location, Ownership Type, Action, Notes
- Inspection information: Cert Decert Date, Initial Cert Date, Approval Date, Inspect Date, Inspector, Inspect
 Status, Opt, NS, Assigned Inspector, Assigned Date, Decert Reason
- Owner's Information: Member ID, Name, Organization, Contact Information, County, Contact status, Absentee
- Optional 6 Year reinspection's: Highlights the properties that are due for a 6 year reinspection
- Required Inspections: Highlights the properties that have been tagged for the annual required sample
- Priority Inspections: Highlights the priority pioneer properties that have been tagged as part of the annual optional sample. If your state does not have any pioneer properties, this list will be empty.
- Assigned inspections: See which inspections have an inspector currently assigned.
- Overdue inspections: List inspections that have not been approved in over 60 days. This report displays inspections that have been in 'draft' or 'submitted' state and it has been more than 60 days since they were last created or modified in the database.

<u>Tree Farmer Reports</u>: These will give you information about the people who own and manage the lands. These reports can be used for mailings or calculating how many people are in your program.

<u>Note</u>: The State Program Tree Farmer report will only pull the primary owner's name. The Mailing list report will only pull the primary contact person's name. If you want a list that will pull all associated owners and contact's names you will need to go to administrative reports.

Details that will be list in these reports include:

• Owner's information: Member ID, Name, Organization, Contact Information, Contact status, Tree Farms they are associated with, Absentee, Total Acres they own

<u>Administrative Reports:</u> These provide information about inspectors, facilitators, and all Tree Farm owners and contact people

Details that will be list in these reports include:

- Inspectors: Inspector contact information, training information, Inspections associated with inspector.
- Inspector Activity: Information around how many inspections have been completed by inspectors.
- Facilitators: Facilitator contact information, training information.
- Tree Farm owners/contacts: Contact information, if the person is a Tree Farm Owner and/or Tree Farm contact.
- Duplicates: This report helps identify potentially duplicated individuals/organizations for your state based on naming or address similarities.
- Data issues: Identifies any potential data quality issues around invalid address, non-contiguous parcels, deceased landowners, ineligible properties.

Glossary of Column Headings and Sources

State: State that property is in or could be the state the landowner resides in. Source: 004 Form.

Tree Farm Number: Tree Farm number that has been given to the property. Source: 004 Form.

Tree Farm Name: Property name that landowner has given to their farm. Source: 004 Form.

<u>Tree Farm Status</u>: Certified or recognition status that that the property is currently at. Source: 004 Form.

County: County that property is in or that landowner resides in. Source: 004 Form.

Tree Farm Acres: Acreage of property. Source: 004 Form.

Location: Location of property. Source: 004 Form.

Ownership Type: Type of ownership of the property. Most properties are non-industrial, private. Source: 004 Form.

<u>Action</u>: If checked, there is an action item to be done for this property in the property notes. Source: The action item checkbox is located on property information.

<u>Notes</u>: Tree Farm notes that have written about this property for additional back ground information. Source: The Tree Farm notes are located in the property information.

Prefix: Name prefix for landowner such as Mr., Mrs., etc. Source: 004 Form

<u>First Name</u>: First Name of landowner. Source: 004 Form <u>MI</u>: Middle initial of landowner. Source: 004 Form <u>Last Name</u>: Last name of landowner. Source: 004 Form

Suffix: Suffix of landowner. Source: 004 Form

<u>Organization</u>: Organization affiliated with landowner or that owns/manages the property. AddressLine1: Main address of primary contact person tied to the property. Source: 004 Form

<u>AddressLine2</u>: Second address line (Apt or suite) of primary contact person tied to the property. Source: 004 Form <u>AddressLine3</u>: Third address line primary contact person tied to the property. Could be used to add family name. Source: 004 Form

City: City of mailing address primary contact person tied to the property. Source: 004 Form

Zip: Zip code of mailing address of primary contact person tied to the property. Source: 004 Form

Phone: Phone number of primary contact person tied to the property. Source: 004 Form

<u>Email</u>: Email address of primary contact person tied to the property. Source: 004 Form

Contact Status: Indicator of validity of contact information. Source: Individual person in database.

Absentee: Indicator if landowner lives on property or not. Source: 004 Form

<u>Cert Decert Date</u>: Date in which latest inspection action was taken. Usually date when latest inspection was approved.

Source: Inspection record in database.

Initial Cert Date: When property was initially certified. Source: Inspection record in database.

Approval Date: When last inspection was approved. Source: Inspection record in database.

Inspect Date: When property was inspected. Source: 004 form; Inspection record in database.

<u>Inspector</u>: Authorized forester who visited the property. Source: 004 Form; inspection record in database.

<u>Inspect Status</u>: Current status of inspection as it relates to completion. I.e., assigned, draft, submitted, or approved.

Source: inspection record in database.

Opt: year in which property is due for optional reinspection, usually every 5-6 years.

NS: Year in which property is due for required reinspection.

Assigned Inspector: Authorized forester who is currently assigned to property.

<u>Assigned Date</u>: Date in which authorized forester was assigned to property.

<u>Decert Reason:</u> Reason for which property was decertified. Source: 004 form.

Member ID: Unique number identifier given to all Tree Farmers. Also referred to as Owner ID.

<u>Is Owner</u>: Marked yes, if person is tied to a property as an owner.

Is Contact: Marked yes, if person is tied to a property as a contact person.

Training Date: Date in which an authorized forester received training to become an inspector.

<u>Training Exp Date</u>: Date in which an authorized forester's received will expire.

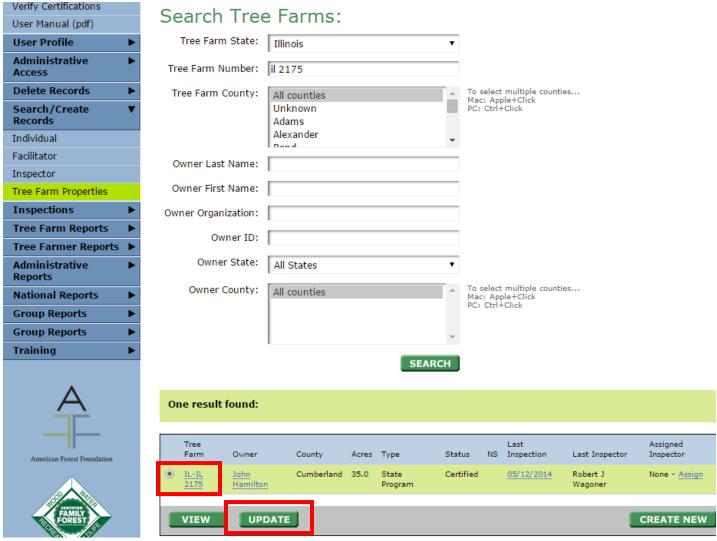
Company: Organization that inspector is affiliated with.

Inspection Type: Type of inspection a property has received, either initial inspection or reinspection. Source: 004 form

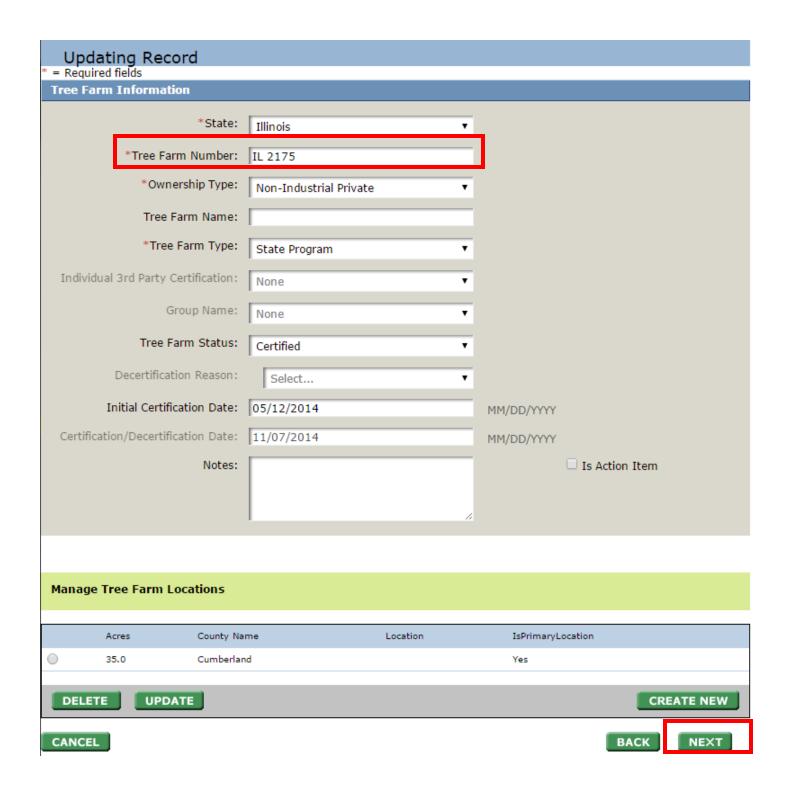
How to change a Properties Tree Farm Number

The TF number for any property in the ATFS database can be changed at any time to any unique alphanumeric combination. If the number is already in use, you will be prompted to use another number by the database to prevent duplication of Tree Farm numbers.

- 6. Log into www.atfsdatabase.org
- 7. Search for the Tree Farm whose number you want to change:
- 8. Click the blue link with the Tree Farm number or you can also hit update (red box)



- 9. A page will appear where you can change owners, you want to hit next.
- 10. The next page will take you to TF number which can be adjusted
- 11. You will get an error if you try to use a number that is already used. Once you change number, hit next and confirm your change. It is now changed in the database.



Changing the Ownership of a Tree Farm

When the ownership or the contact person of a Tree Farm needs to modified, you need to make sure that the person already exists in the ATFS database. Once that person has been entered into the database you can add them as an owner or contact to a Tree Farm.

Editing Tree Farms Method 1

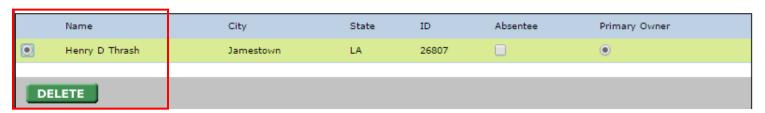
- 1. Click Search/Create Records → Farm Properties
- 2. Search for the Tree Farm by its Tree Farm number or ownership
- 3. Click the Tree Farm number to open the edit Tree Farm page.



- 4. The first page you will see, in the new window, is the ownership and contact page. To add a new owner/contact, search for the person first using the search fields at the top of the page.
- 5. After a few seconds you will see your search results in the first box
- 6. Choose the person you want to be the new owner/contact by clicking the circle next to their name
- 7. Click add to owner or add to contacts



8. You can remove the former owner/contact by clicking the circle next to their name and then delete. Keep in mind you cannot delete someone who is a primary owner or contact.

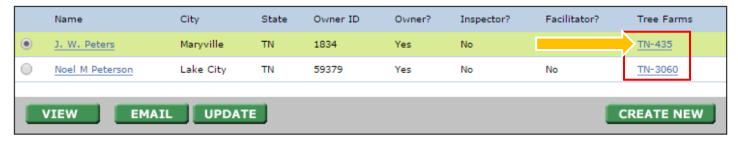


Editing Tree Farms Method 2

Under Search/Create Individuals → individuals you search for people or organizations. In the search results you will see what Tree Farm properties the individual is listed as the owner of.

- 4. Search for the individual that is owner of the property of interests
- 5. In the search results, click the Tree Farm linked to their name. This will open the details of the property that can be edited.

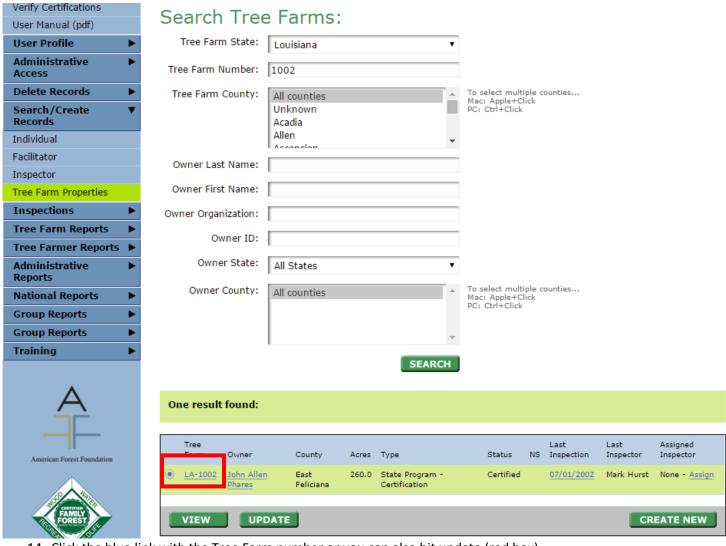
- 6. Repeat steps 4-8 above.
- 7. Confirm changes



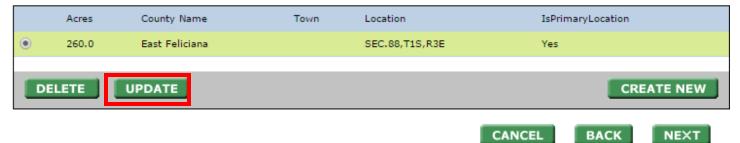
How to Update Tree Farm Acreage

The TF acreage for any property in the ATFS database can be changed at any time to reflect property changes.

- 12. Log into www.atfsdatabase.org
- 13. Search for the Tree Farm whose number you want to change. Here we are doing LA-1002:



- 14. Click the blue link with the Tree Farm number or you can also hit update (red box)
- 15. A page will appear where you can change owners, click next.
- 16. The next page will take you to the property details, all of which can be updated. At the bottom of the page you will see the acreage information. See image below
- 17. Hit update and this portion of the page will expand so you can change acreage. Once finished, hit okay then next.
- 18. Hit confirm so that the information is saved.



CANCEL Tree Farm Location *Acres: 260 Is Primary County: East Feliciana Town: Location: SEC.88,T1S,R3E Location (legal): Latitude: Longitude: Quarter: Section: Township: Range: ок CANCEL

How to Update Inspector's Training

Committee members with District Chair or State Administrator access to the database have the capability of entering an inspector training record and subsequently update it. Updating training also includes marking an inspector from active to inactive or vice versa.

Other things that can be done in this section:

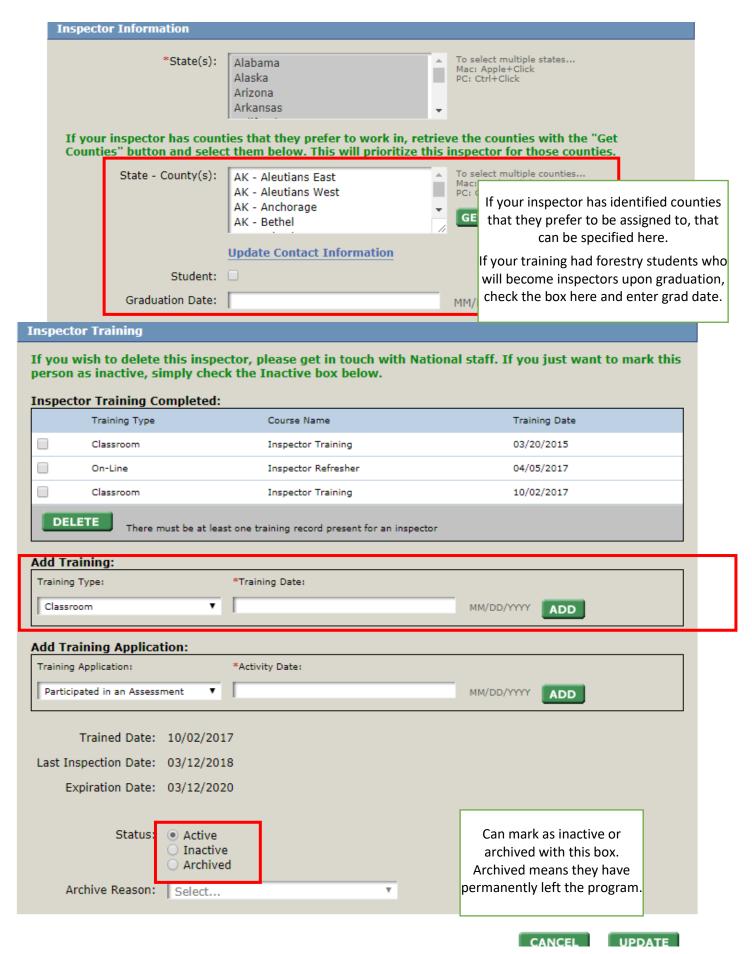
- Adding an inspectors preferred inspection county
- Adding in a forestry student who will become an inspector upon graduation
- Adding a training application for an inspector that can extend their credentials.

Inspector training updates can be done easily:

1. Search for the inspector by name or ID. The image below shows a search for an inspector by their ID



- 2. Hit Create/ Update in the lower right
- 3. You will see fields for their username, password, and hint. Below that you will see training related information. You may change any of these fields.

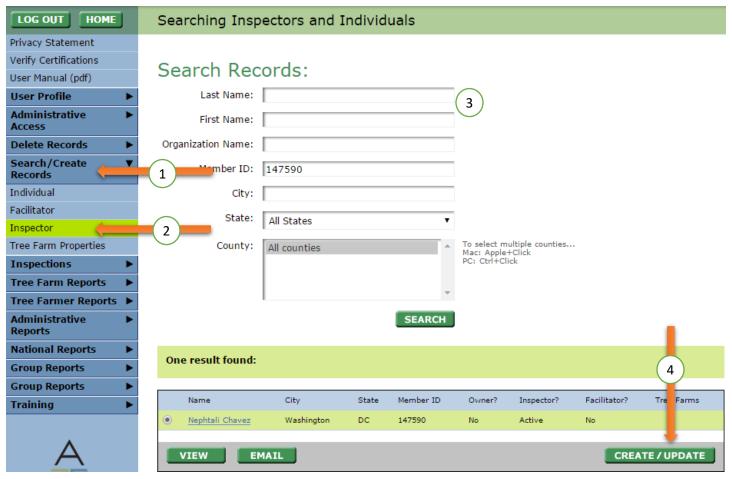


4. Hit update

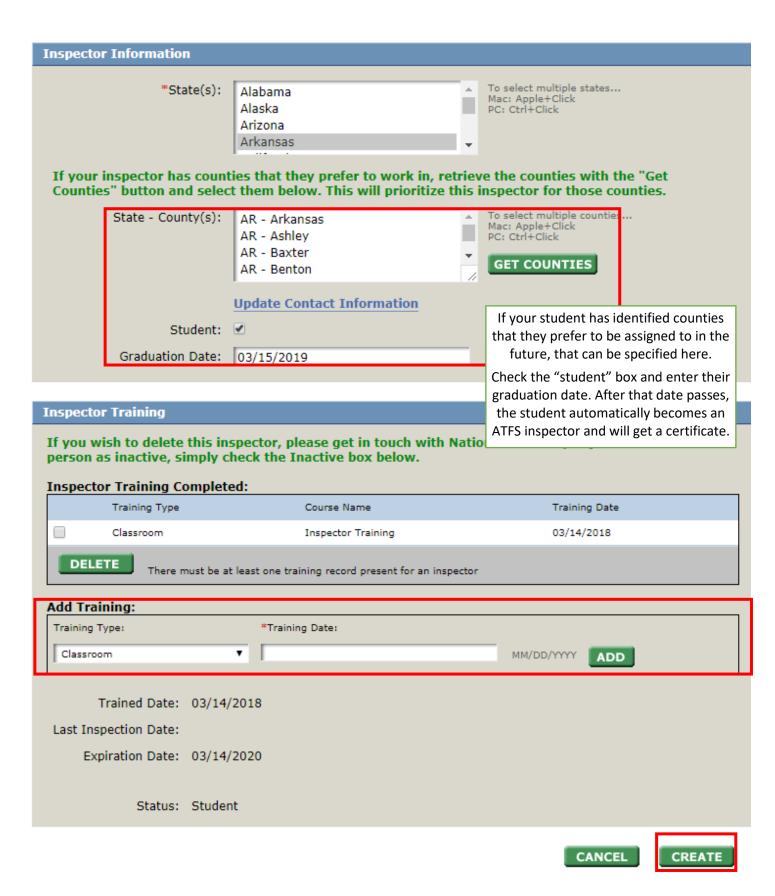
How to Enter a Future Inspector (Student forester)

Committee members with District Chair or State Administrator access to the database have the capability of entering an inspector training record and can do this for students who plan on becoming inspectors upon graduation. The benefit of creating the student and entering them into the database is that upon graduation, their training will allow them to automatically become an active inspector in our database. This eliminates the need for state admins to enter the person upon graduation.

- 1. Search for the student by name or ID. If they do not already exist in the database, create them under search/create individual then proceed to step 2.
- 2. Under search/create inspector, search for the student. The image below shows a search for an existing student by their ID.



- 3. Hit Create/ Update in the lower right
- 4. You will see fields for their username, password, and hint. These are required for you to fill, if they don't exist. Below that you will see the student area and training related information.



5. Hit update

How to Update Inspector's Training Applications

An inspector can keep their ATFS inspector status "active" by completing inspections or other approved <u>training applications</u>. For more information on the most current qualifying applications visit the <u>inspector's corner</u>.

Committee members with District Chair or State Administrator access to the database have the capability of entering an inspector training application.

NOTE: Only training applications that have been completed within the last year will update the expiration date. Anything older than that can be stored, but will not count toward extending the expiration date.

Other things that can be done on this page:

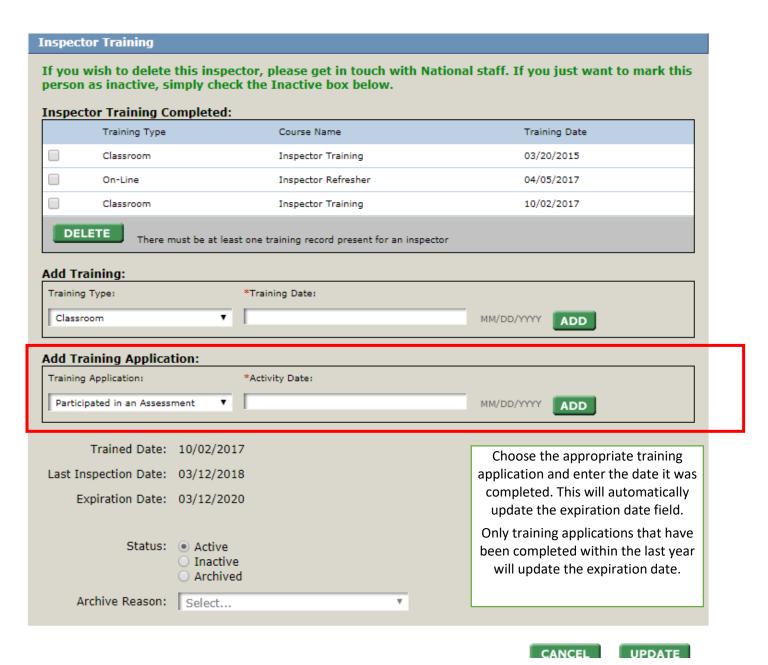
- Adding in a classroom training record
- Adding an inspectors preferred inspection county
- Adding in a forestry student who will become an inspector upon graduation

Inspector training application updates can be done easily:

1. Search for the inspector by name or ID. The image below shows a search for an inspector by their ID



- 2. Hit Create/ Update in the lower right
- 3. You will see fields for their username, password, and hint. Below that you will see training related information. You may change any of these fields.



- 4. Enter the application and the date, then click "Add".
- 5. Hit "update"

How to Update Inspector's Training Status

Within the database an inspector will automatically be marked as active, inactive or expired depending on their training record. An inspector can be manually changed to inactive or archived.

The different inspector status designations are:

Status	Meaning	How it gets updated
Active	Individual is current with the <u>training</u> requirements of the ATFS program.	By entering a training record or <u>training application</u> .
Expired	Inspector's training credentials have expired within the last 6 months	Automatically updated in the database, cannot be manually changed.
Inactive	Inspector's training credentials have expired over 6 months ago. This person may want to come back in to the program.	Automatically updated in the database, can also be manually changed.
Archived	Inspector's has permanently left the ATFS program because of no interest, death, etc.	The person is automatically archived if they have not had any ATFS activity (training or inspection) in over 5 years. They can also be manually archived.

Committee members with District Chair or State Administrator access to the database have the capability of entering an inspector training record and subsequently updating it.

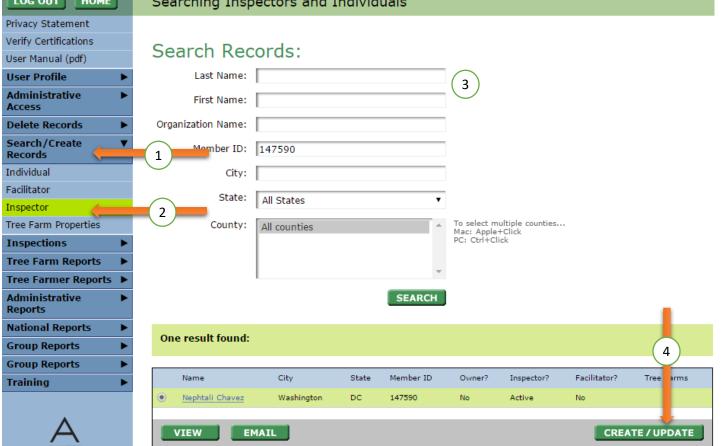
Other things that can be done on this page:

- Adding an inspectors preferred inspection county
- Adding in a forestry student who will become an inspector upon graduation
- Adding a training application for an inspector that can extend their credentials.

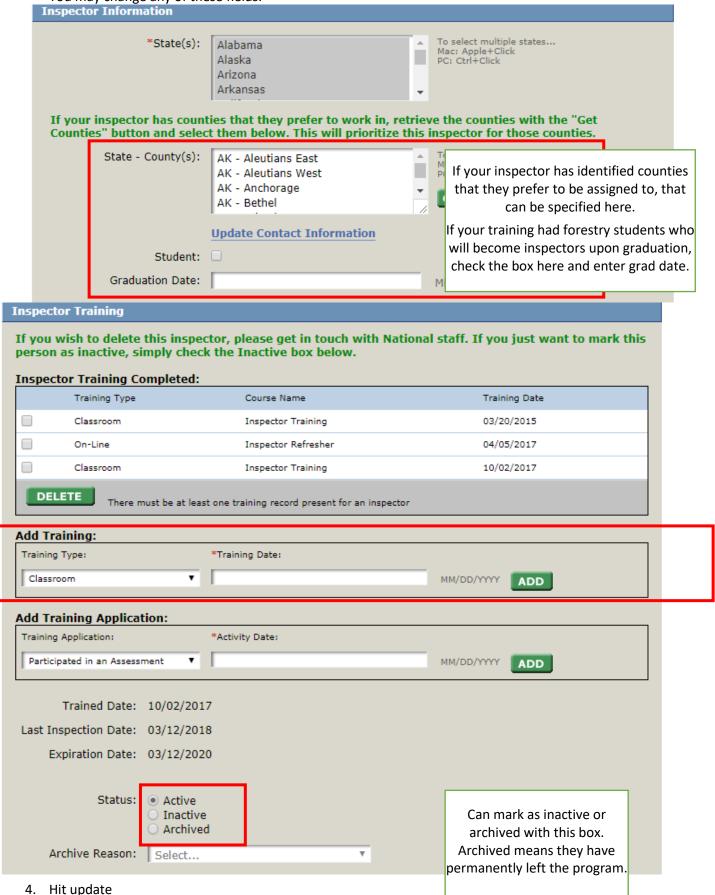
Inspector training updates can be done easily:

1. Search for the inspector by name or ID. The image below shows a search for an inspector by their ID

LOG OUT HOME Searching Inspectors and Individuals



- 2. Hit Create/ Update in the lower right
- 3. You will see fields for their username, password, and hint. Below that you will see training related information. You may change any of these fields.



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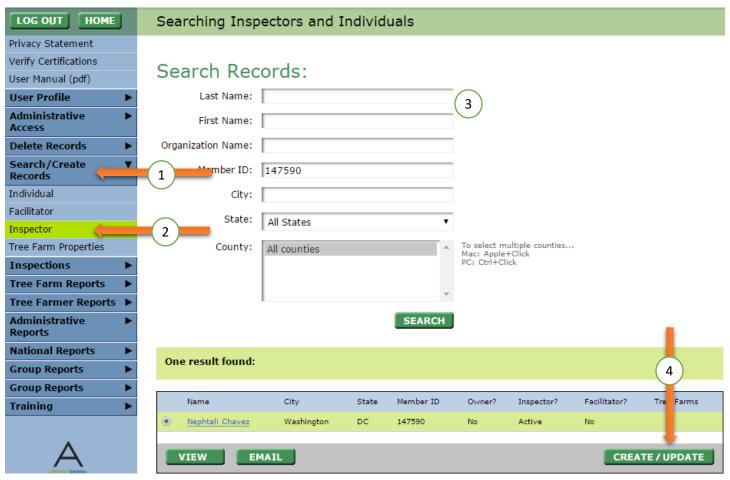
How to Change an Inspector's ATFS Password

Committee members with District Chair and State Administrator access to the database have the capability of entering inspector training and subsequently creating inspector usernames and passwords.

Usernames usually follow the format of first name initial+ last name EX) Robert Frost would be Rfrost. Passwords given to inspectors should be consistent throughout so that inspectors can be easily told what their password is, i.e. changeme.

If an inspector needs to get their password change for some reason this can be done easily:

1. Search for the inspector by name or ID. The image below shows a search for an inspector by their ID

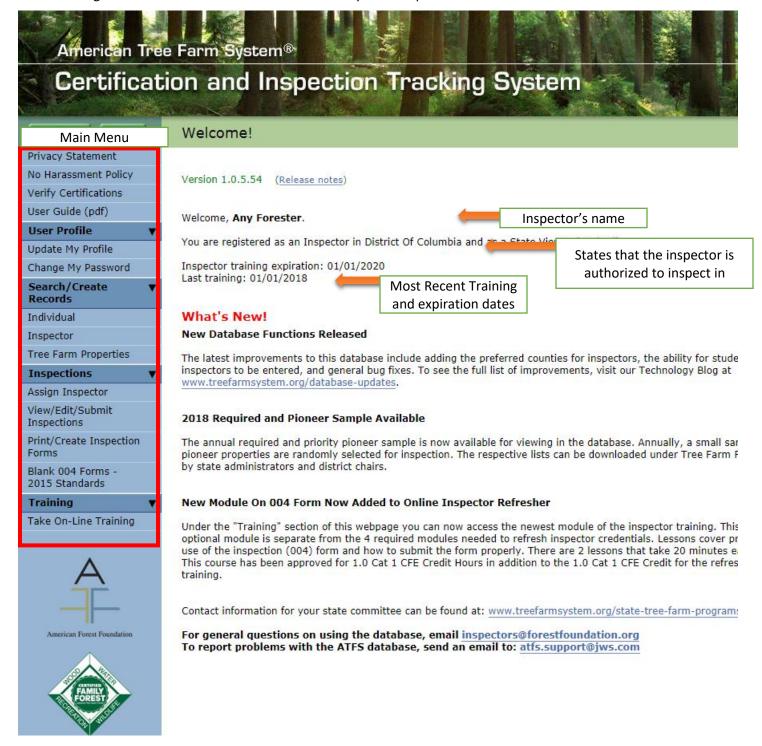


- 2. Hit Create/ Update in the lower right
- 3. You will see fields for their username, password, and hint. You may change any of these fields.
- 4. Hit update

What an Inspector Can Do in the ATFS Database

All inspectors have a username and password to ATFSdatabase.org, it is assigned to them when their training records are first entered. Once logged in an inspector can do a variety of things in the database.

<u>What does an inspector see?</u> This is what it looks like to be logged in as an inspector. There are some of the same menu items that higher access roles have. Below is the anatomy of an inspecto access role.



What can an inspector do? See the chart below!

Additional notes:

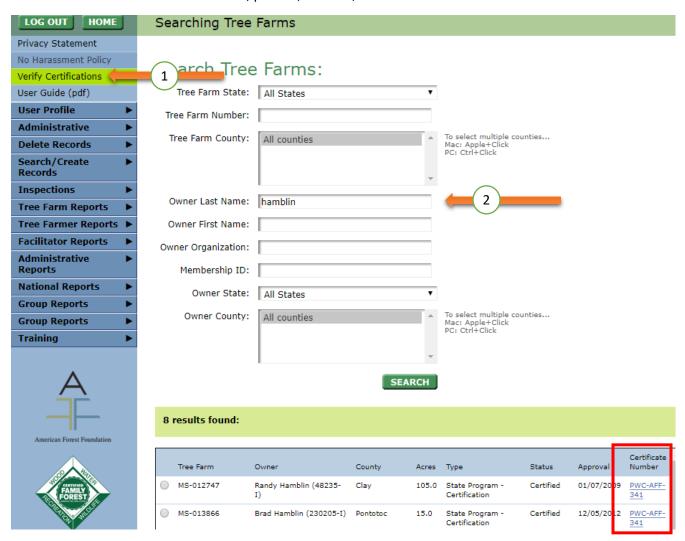
- Inspectors cannot create a new individual/organization, just edit them.
- Inspectors also cannot create a new Tree Farm and can only edit properties if they are assigned to them.
- Inspectors can assign themselves if they are listed as the last inspector of that property.
- Inspectors will receive an error message if they try to do anything out of their permissions.
- Inspectors do not see any type of reports.
- Inspectors can create their own pre-populated 004s and enter their own inspections for submission. Whoever they submit the inspection to will get an email notification asking for approval.
- Inspectors can view all past inspections even if they did not perform them.

Capabilities of each role	State Viewer	Approver	Inspector	District Chair	State Admin	Nat'l Admin	
Verify certifications	✓	✓	✓	✓	✓	✓	
Create Database Users						✓	
Disable Users					✓	✓	
Delete Records						✓	
Search Records	✓	✓	✓	✓	✓	✓	
Create Records				✓	✓	✓	
Edit Individuals/Properties			√ **	✓	✓	✓	
Edit Insp. Training & Password			(change Pw)	✓	✓	✓	
Assign Inspections		✓	**	✓	✓	✓	
View/Edit/Submit Inspections	(Can view)	(Can view)	✓	✓	✓	✓	
Approve Inspections		✓		✓	✓	✓	
Print/Create Inspection Forms			✓	✓	✓	✓	
Tree Farm Reports				✓	✓	✓	
Tree Farmer Reports					✓	✓	
Administrative Reports					✓	✓	
Access Online Training **Inspectors can edit/assign themselves to a property if they were the last person to inspect that property (according to the database). They can edit individual's contact information.							

Downloading or Reprinting a Landowner's Tree Farm Certificate

All new Tree Farmers enrolled in either the certified or recognition category will receive a welcome packet with a certificate in the mail. This process of mailing welcome packets occurs monthly, but a certificate can be reprinted at any time for a landowner through the ATFS database. This can be helpful if the landowner needs additional copies of the certificate, misplaces their copy, etc.

- 1. Go to the "Verify Certifications" menu on the left side
- 2. Search for the property of interest
- 3. Click the hyperlink under the certificate number column and a certificate will begin to automatically download as a PDF. This PDF can be saved, printed, emailed, etc.



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Introduction to Spatial Functionality in ATFS Database

In recent years, the ATFS program has been facilitating collection of spatial data for committees, through grants and creation of tools that facilitate outreach and data updates. Through 2017-2018, ATFS worked with several states to do massive landowner outreach and capture spatial data points, as well. Starting in early 2019, adding functionality to the ATFS database to capture and store spatial data began. With these new features, active ATFS volunteers will be able to draw boundaries to map out ATFS Tree Farms.

Having high-quality data and spatial data benefit the entire system in several ways:

- Facilitates location of property for regular re-inspections and during assessments.
- In the future, this information can be overlaid with landscape management plans or other tools to streamline the entry of inspections.
- Allows for GIS analysis on Tree Farms for more effective outreach, field days, determining Tree Farm hot spots or dead zones, implementation of conservation initiatives, etc.
- Prevents duplicate enrollment of the same property.
- Prevents enrollment of noncontiguous parcels.

What if Our State Has Spatial Data Readily Available?

With the help of our database programmer, shapefiles with digitized Tree Farms can be imported. If you have added new fields to your spatial data, there is no guarantee that additional data and fields will be imported, as well, but those situations will be handled individually. The main data of interest are the Tree Farm boundaries. Please contact Nephtali Chavez at nchavez@forestfoundation.org to begin the process and to ask any questions.

Required Fields:

- State
- Tree Farm number

Formatting Details:

- Zipped shapefile or geodatabase.
- Projection must be defined for the dataset.
- Each Tree Farm should only have one contiguous boundary. If a Tree Farm boundary is duplicated, or a Tree Farm number is repeated but has different boundaries, that property boundary will not be imported.

Instructions:

- 1. Please email Nephtali Chavez at nchavez@forestfoundation.org a zipped shapefile with the dataset.
- 2. Provide an estimate of when the dataset was last updated.
- 3. Folder can be shared through a file sharing site, such as drop box or google drive, if it is too large for email.

Permissions

The ATFS database is gaining spatial capabilities that will allow state committee members and ATFS inspectors to input Tree Farm boundaries. The same permission rules that exist currently for Tree Farm editing will apply for viewing, creating, and modifying Tree Farm boundaries.

For example, state program administrators can make edits and create new Tree Farms in their state, but not for other states. The same will apply to boundary creation/editing.

For example, inspectors cannot create new Tree Farms, but can edit/enter Tree Farm property information as part of an inspection. Inspectors will not be able to create boundaries for properties they are not assigned to.

To view the permissions of various roles, please look at this document:

https://www.treefarmsystem.org/stuff/contentmgr/files/2/3105c7731a9ca78986fdc7faa9c655b3/files/capabilities_of_each_role.pdf

Privacy Concerns

Information held within the ATFS database is closely guarded and only authorized users can access this information. This website (ATFS Database) is owned and operated by the American Forest Foundation (AFF) and is intended to provide useful information to those individuals managing records of the American Tree Farm System® (ATFS) in their respective state(s). AFF is committed to ensuring the privacy of persons (Tree Farmers) participating in ATFS and will take every precaution to protect Tree Farmer information, both online and offline. Each user of the ATFS database is required to agree to the ATFS nondisclosure agreement before being able to access the information within.

Troubleshooting

Please clear your browser's cache to ensure that all the new features can be used without issue.

If you continue to have technical issues please contact Nephtali Chavez at nchavez@forestfoundation.org or ATFS support at atfs.support@jws.com. In your message, please include the following information:

- Browser being used and version.
- What the issue is and what you are trying to achieve.
- Step that were taken that caused the issue.

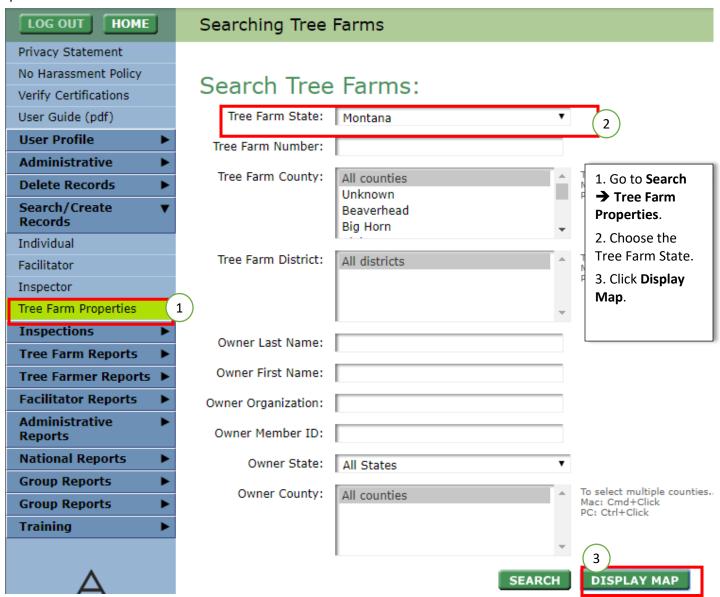
Searching for Spatial Data

The boundary for a Tree Farm is stored along with the other property details—such as acreage, location, status—that you are familiar with. You can view/edit boundary information by searching for a Tree Farm and clicking on the Tree Farm number or Display on Map.

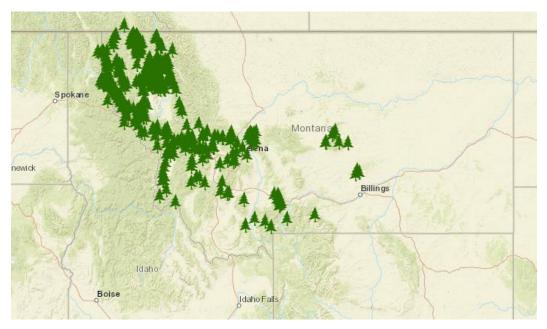
Searching from the **Search/Create** → **Tree Farm Properties** Menu (Preferred):

Quickly Viewing all Locations of Tree Farms in Your State:

From this menu, you can view the location of all the Tree Farms (all that have had boundaries drawn) in your state for a quick review:

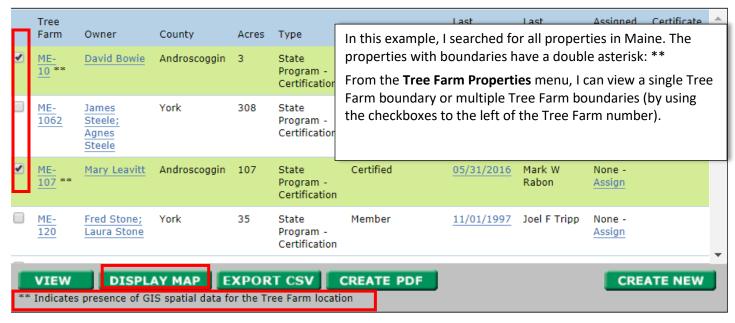


Clicking Display Map will launch the Tree Farm Viewer window showing the location of each Tree Farm:



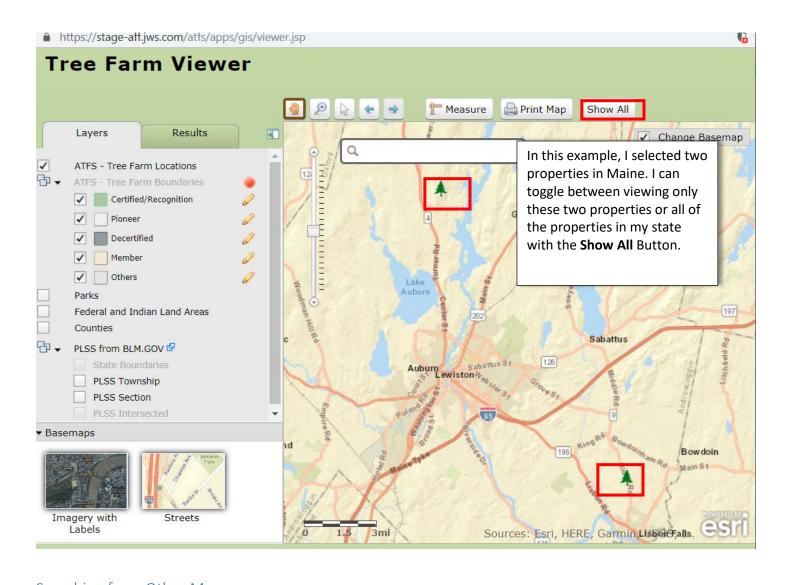
Finding the Locations of Specific Properties:

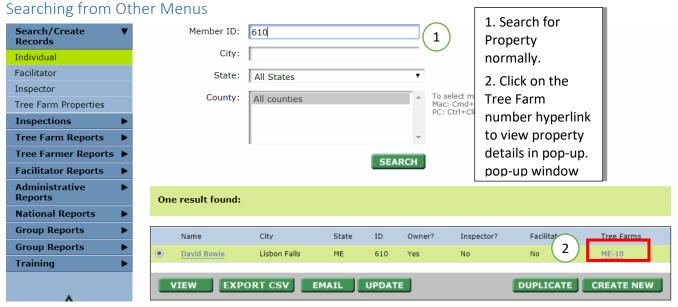
- 1. Go to Search/Create Records → Tree Farm Properties.
- 2. Search for the Tree Farm(s) of interest.
- 3. From the search results select the Tree Farm(s) to view with the checkboxes.



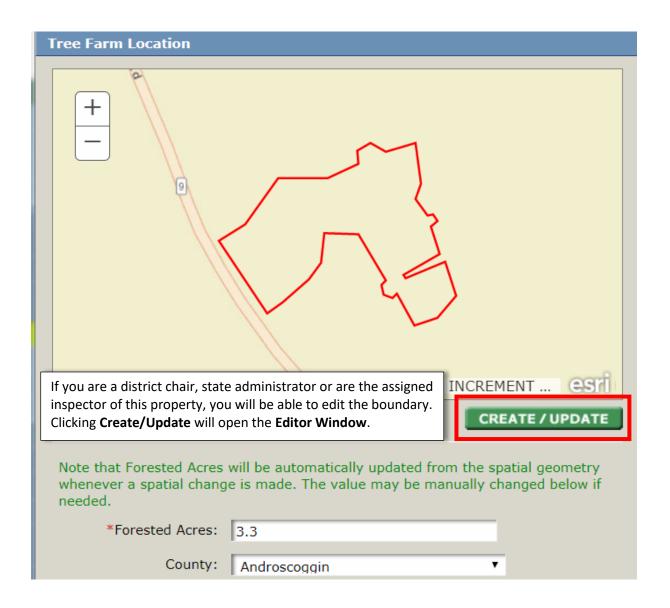
Although users can view multiple properties at once, nobody can edit or create multiple boundaries at the same time through the online database. View, <u>submitting multiple boundaries at once</u>.

When specific properties have been selected for viewing, the **Tree Farm Viewer** will only display the properties that were checked in the search results. You can toggle between viewing all properties in your state and the selected properties with the **Show All/Show Selected** Button.





Anywhere that the Tree Farm number is hyperlinked, you can view the boundary (if it exists). In the resulting pop-up window, click the **Next** button at the bottom of the page *twice* to get to the **third page**, where the boundary is stored. If the boundary exists, the third page will look something like the image below. Otherwise, you would see an outline of the entire state.



Viewing Spatial Data

The quickest method to view existing Tree Farm boundaries is to search for a Tree Farm property.

- 1. Go to Search/Create Records → Tree Farm Properties.
- 2. Search for the Tree Farm of interest.
- 3. From the search results select the Tree Farm(s) to view through the checkboxes.
 - a. Alternatively, you can select one Tree Farm and click the **View** button. This will display property details and a quick spatial overview in a new webpage that can be printed. Do not proceed with the next steps.
- 4. Click Display Map.
 - a. A pop-up will open; make sure you allow pop-ups.



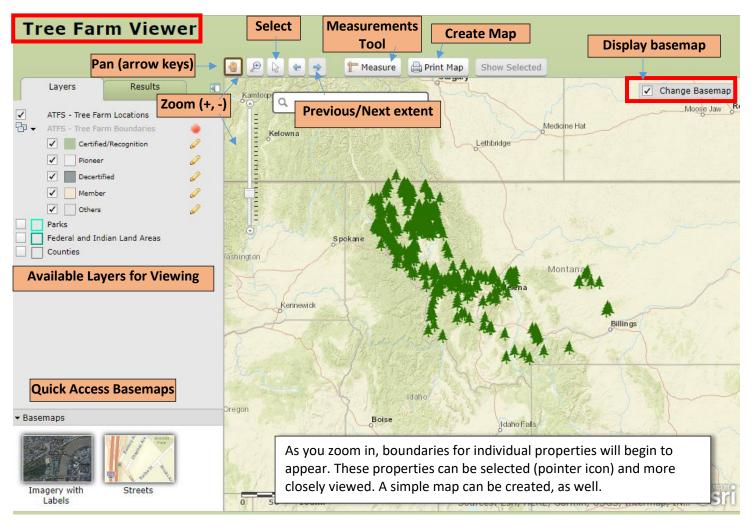
- 5. This is the **Viewer Window**; here, you can:
 - a. Create and print a basic map.
 - b. Zoom in and out (Keyboard short cuts: +)
 - c. Pan around an area (Keyboard short cuts: arrow keys)
 - d. Select a Tree Farm to view details about it, such as last inspection, owner, status, etc.
 - e. Select a Tree Farm(s) and download the shapefile for further analysis.
 - f. Take measurements.
 - g. Overlay layers over properties

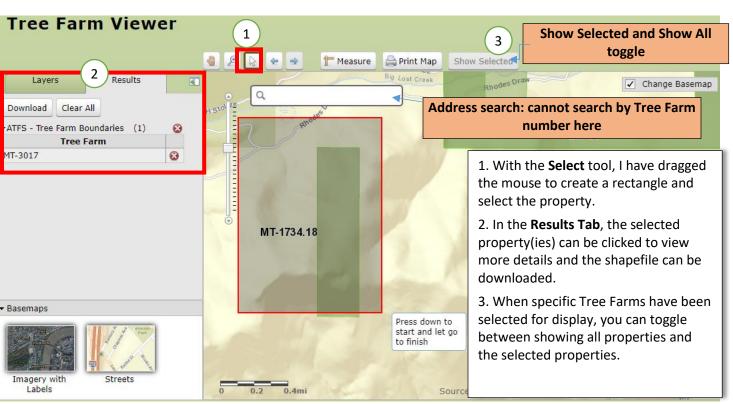
Note: You cannot make edits in the **Viewer Window**. This must be done in the **Editor Window** and can only done by authorized users. See Permissions.

Spatial Viewer Example

The image below demonstrates a Tree Farm Viewer Window, showing the location of each Tree Farm with spatial boundaries drawn.

- 1. This is the Viewer Window, here you can:
 - a. Create and print a basic map.
 - b. Zoom in and out (Keyboard short cuts: +)
 - c. Pan around an area (Keyboard short cuts: arrow keys)
 - d. Select a Tree Farm to view details about it, such as last inspection, owner, status, etc.
 - e. Select a Tree Farm(s) and download the shapefile for further analysis.
 - f. Take measurements.
 - g. Overlay layers over properties



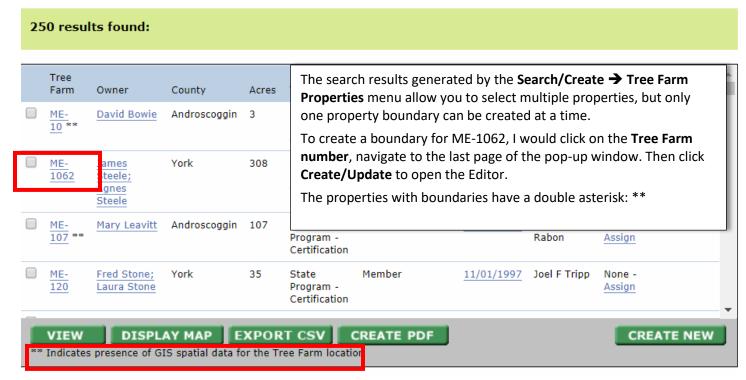


Creating a Single Tree Farm Boundary

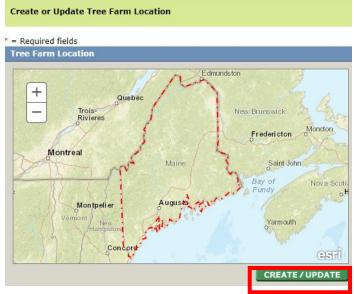
The boundary for a Tree Farm is stored with the other property details, such as acreage, location, etc., that you are familiar with. A Tree Farm boundary can only be created by users with certain permissions and in the **Editor Window**.

To access the **Editor Window:**

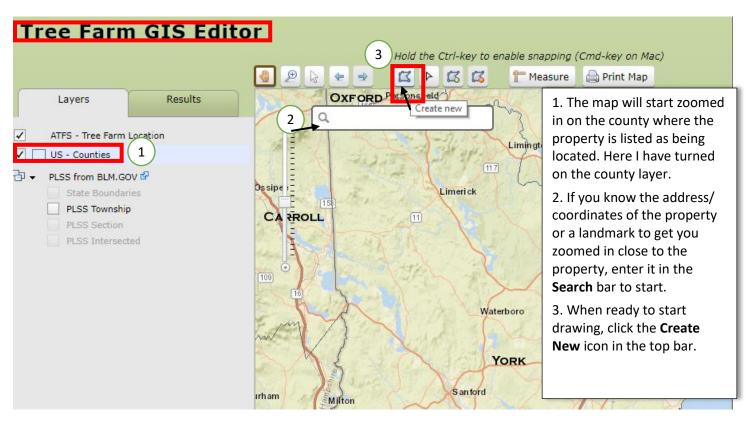
- 1. The Tree Farm must already exist.
- 2. Search for the Tree Farm Property
- 3. In the search results, open the property of interest.
- 4. In the resulting pop-up window, click the **Next** button at the bottom of the page *twice* to get to the **third page**, where the boundary is stored.

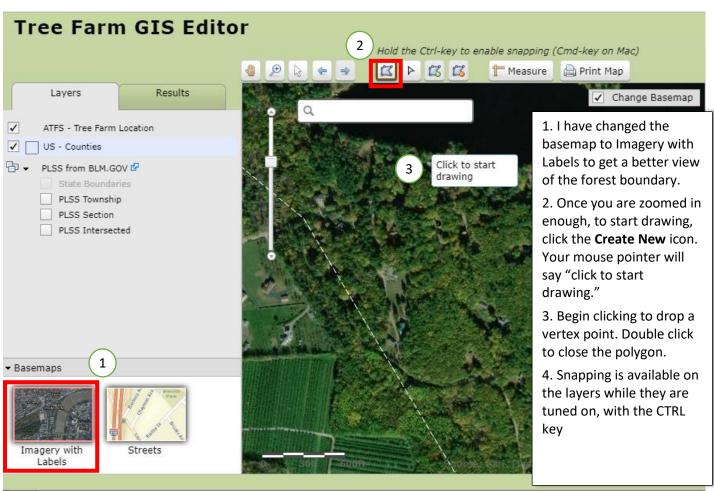


Anywhere that the Tree Farm number is hyperlinked, you can get to the Editing window. If there is no boundary you will see a general outline of the state:



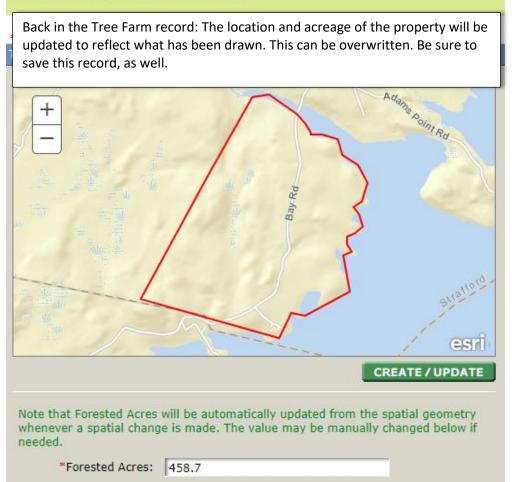
After clicking Create/Update, the Editor will pop up and zoom into the county where the property is located.







Create or Update Tree Farm Location

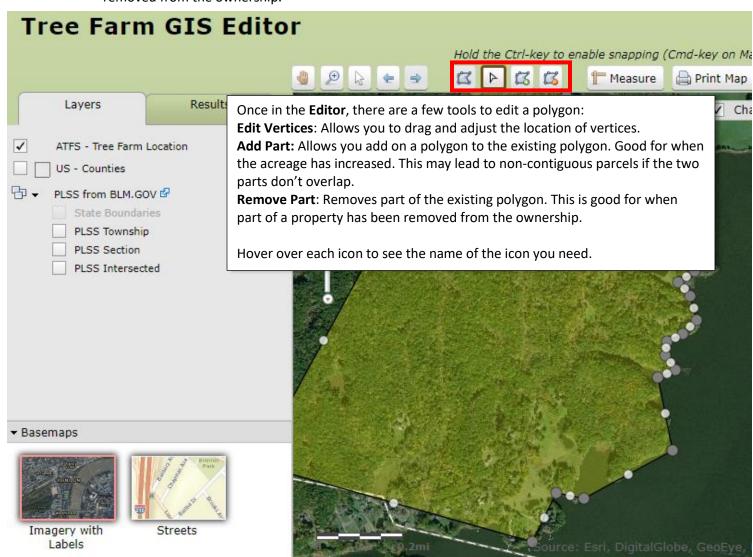


Editing a Single Tree Farm Boundary

A Tree Farm boundary can only be edited by users with certain permissions and in the Editor Window.

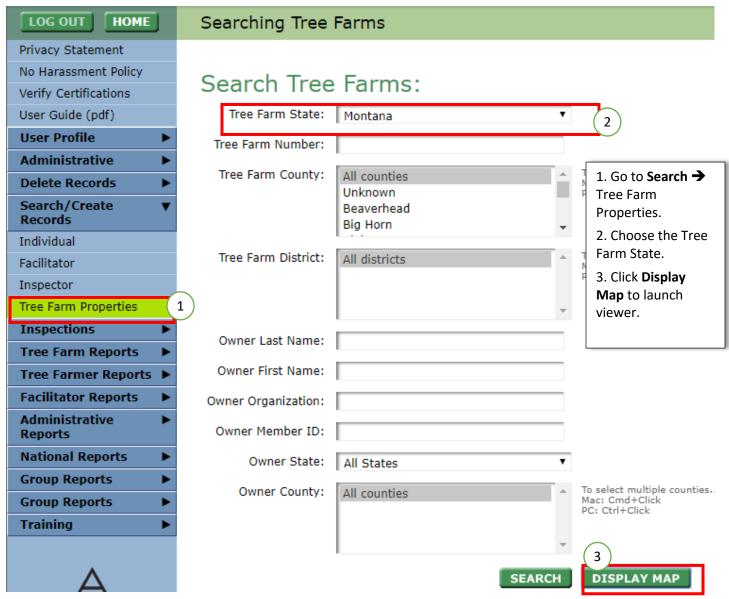
To access the **Editor Window:**

- 1. The Tree Farm must already exist.
- 2. Search for the Tree Farm Property
- 3. In the **Search** results, open the property of interest
- 4. In the resulting pop-up window, click the **Next** button at the bottom of the page *twice* to get to the **third page**, where the boundary is stored.
- 5. Click the **Create/Update** button to launch the **Editor Window.**
- 6. Once in the **Editor**, there are a few tools to edit a polygon:
 - a. Edit Vertices: Allows you to drag and adjust the location of vertices.
 - b. **Add Part**: Allows you add on a polygon to the existing polygon. This may lead to non-contiguous parcels if the two parts don't overlap.
 - c. **Remove Part**: Removes part of the existing polygon. This is good for when part of a property has been removed from the ownership.

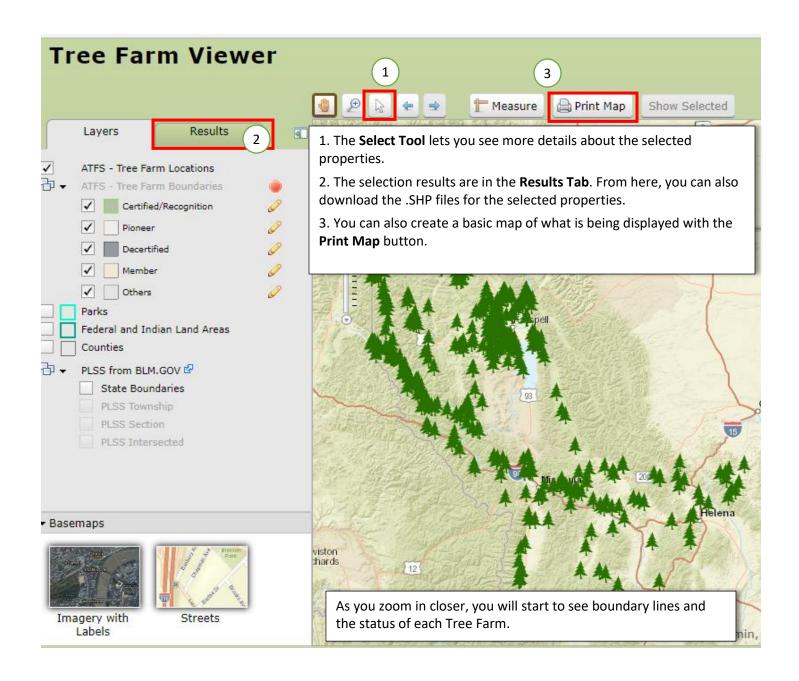


Viewing All Tree Farms for Your State

From the Tree Farm **Properties** menu, you can view the location of all the Tree Farms (all that have had boundaries drawn) in your state for a quick review:



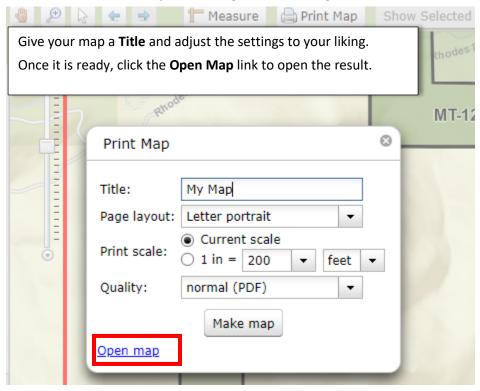
Clicking **Display Map** will launch the **Tree Farm Viewer** window showing the location of each Tree Farm. This map can be printed for sharing. The shapefile can also be downloaded for further spatial analysis or edits. <u>See Downloading Shapefile</u>.



Creating a Basic Map for a Single Property

The simplest way to create a basic map for a single property in particular is to search for the property of interest and open its boundary through the Tree Farm record.

- 1. The Tree Farm must already exist.
- 2. Search for the Tree Farm Property
- 3. In the Search results, open the property of interest.
- 4. In the resulting pop-up window, click the **Next** button at the bottom of the page *twice* to get to the **third page**, where the boundary is stored.
- 5. Click the Create/Update button to launch the Editor Window.
- 6. Once in the **Editor**, the basemap, shading of the property, and layers visible can be changed to customize the map.
- 7. click the **Print Map** button to get the following window:

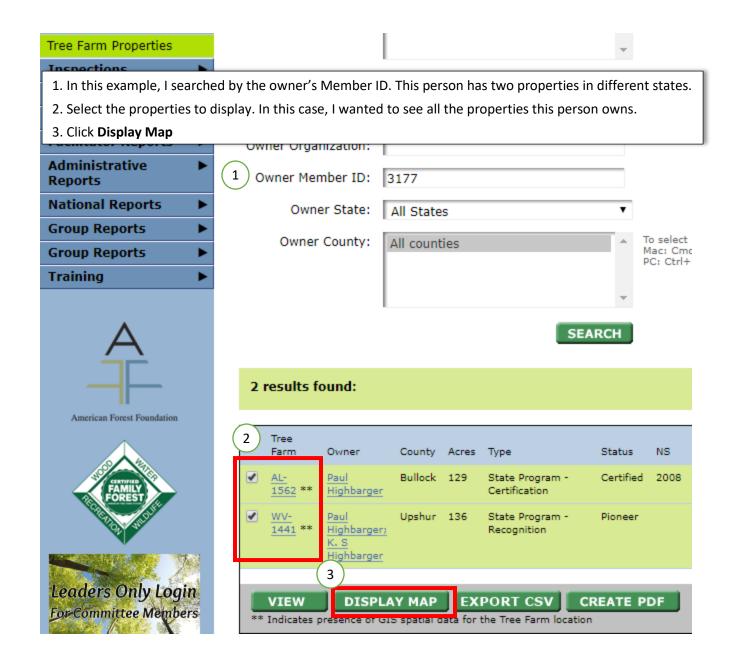


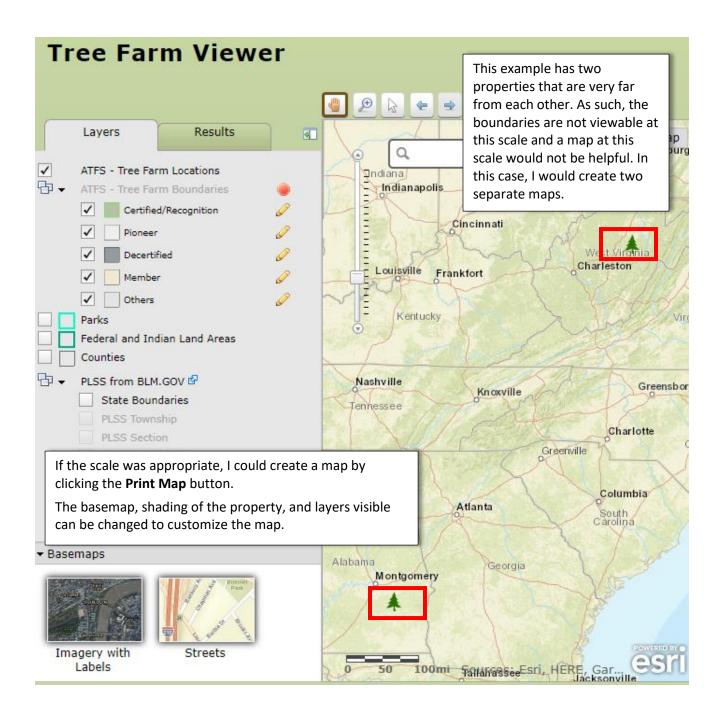
Creating a Basic Map for Multiple Tree Farms

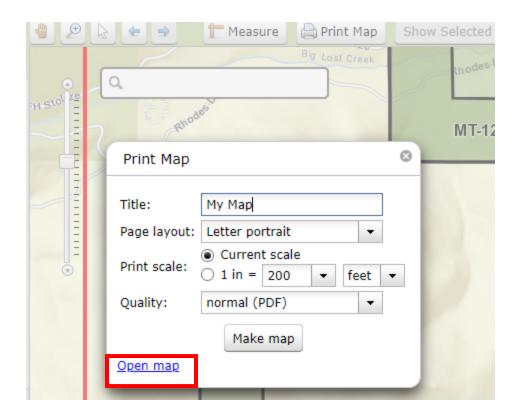
If you want to create a map that contains multiple Tree Farms, it is easiest if they have something in common, such as a common owner, but not required.

Note: If the properties are far apart from each other, their boundaries may not be visible. If that is the case, separate maps are suggested. Some guidelines:

- 1. The Tree Farms must already exist.
- 2. <u>Search for the Tree Farm Property,</u> in the **Search** → **Tree Farm Properties** menu.
 - a. Search by the feature that they have in common, such as owner, county, etc.
- 3. In the **Search** results, select the properties that you want to display using the check boxes.
- 4. Click Display Map.
- 5. Use **Print Map** button to create a basic map.







Downloading Layer Data for Your State (Shapefiles)

- 1. Go to Search/Create Records→Tree Farm Properties.
- 2. **Search** for the Tree Farm(s) of interest.
- 3. From the **Search** results, select the Tree Farm(s) to view with the checkboxes.
- 4. Click Display Map to launch Tree Farm Viewer.
- 5. Use the **Select Tool** to refine or select all the Tree Farms of interest.
- 6. In the **Results Tab** click the **Download** button to begin download.

