



TOC Site Plan Tabular Data Entry User Guide

Revised: May 2010
Version 3.1

Document Change Control

Version	Date of Issue	Author(s)	Brief Description of Change
0.1-1.0	2005-2007	Various	Original BCTS Site Plan User Guide creation and edits
2.0	October 2008	Marc Coderre, Geospatial Info. Services	Reviewed and significantly revised for TOC specific Business Processes around Site Plan and Site Plan Amendment data entry.
3.0	Feb 2010	Carol Davidson - Data Analyst, TOC	More updates for use by contractors entering only tabular data.
3.1	May 2010	Carol Davidson	Added information on how to create and print a site plan report

TOC Site Plan Tabular Data Entry

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OVERVIEW

Purpose: The purpose of this document is to provide a framework for entering a new Site Plan information into Genus Resources for the TOC business area. It is designed to be used by both provincial TSO Staff and Contractors who have sufficient privileges to enter and update Block and Site Plan (SP) information.

The objective is to have the necessary tabular and spatial data in Genus to ensure a successful Opening Definition submission to RESULTS (Reporting Silviculture Updates and Land status Tracking System) via the ESF (Electronic Submission Framework). This data will also provide the foundation for subsequent ESF submissions, such as Disturbance, Milestone, Silviculture Activity, and Forest Cover submissions, so it is imperative that this information is entered accurately.

Although this document is primarily for the creation of new site plans, many sections will also be relevant for older ISIS converted blocks where the Silviculture Prescription information has been transferred to Genus, but there are no spatial linkages.

This User Guide presumes that the user is familiar with Resources, and understands how to find blocks in the navigator tree, open the various modules, insert new records and locate the screens referred to in this guide.

This guide is based on the BCTS Block Site Plan Report User Guide; contact your contract administrator for a copy of the 96-page manual.

Data integrity in Genus Resources is of paramount importance, therefore consistently poor data entry, or manipulation of the spatial data without authorization from TOC GIS staff will result in immediate suspension of access to Resources, and will be reported to the Contract Administrator

NOTE: Only TOC GIS staff are authorized to enter, create and link spatial data in Resources. Contractors are only authorized to enter tabular data.

Before proceeding:

- Ensure data to be entered is correct and ready for entry.
- Create blank SU and ECO records in Resources, so that TOC GIS staff can link spatial to those records, thereby providing the contractor with the correct spatial areas. At no time are the spatial areas to be manually overridden with a different value.
 - If necessary, SU and ECO details can be filled in after spatial is loaded.
- After SU and ECO records have been created, provide TOC with spatial data, as per the TOC Spatial Data Standards document, located on the MFR FTP site:
 - TOC\external\publish\BCTS_Data\Standards_Document

Site Plan Spatial Data entry



Standard practice requires that the spatial data (block boundaries, ecology and SU's) be loaded by GIS staff.

Finalising the entry of the tabular SP data will require that the SUs and areas generated during the spatial data load are consistent with the field work that was conducted.

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1. Navigate to Block

- Open **Navigator Tree**, Select Licence number
- Right-click block icon and select **Silviculture** from the menu to pull up **Silviculture Activities** window.

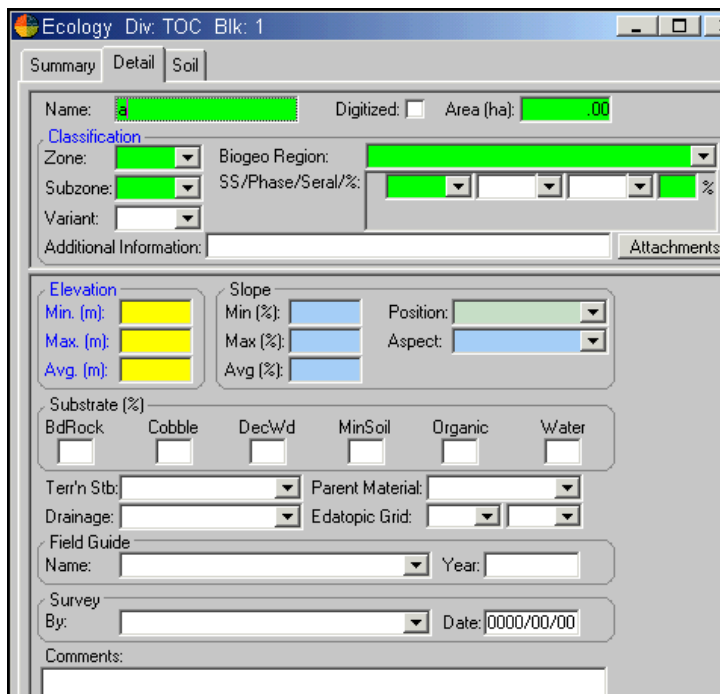
2. Enter Ecology Data (to be done prior to spatial data loading)

Double-click **Eco Unit** under **Base Activity** and a blank **Ecology** window will appear.

- **Insert Record**  to add an Eco Unit (EU) and Genus will automatically bring up the **Detail** tab.
Note: Eco Units are named using small letters (a, b, etc). NOT numbers or capital letters.
- Enter data for each EU. Mandatory fields are color-highlighted.
 - ✓ **Name**
 - ✓ **Area** (will be auto-populated when digitized – do not enter data here)
 - ✓ **Zone, Subzone, Variant Site Series, Phase, Seral, Biogeo Region**
 - Multiple site series can be entered by clicking under the site series field and clicking “insert record”

This is all that is necessary for tabular entry prior to spatial data loading.

Ecology window – Detail tab



To continue with tabular data entry:

Enter additional ecology units for the block by returning to the Ecology “Summary” screen and clicking “Insert Record” 

Go back to Ecology Summary tab and insert additional records and repeat data entry and as necessary

Save and exit Ecology window when all Ecology in Site Plan have been accounted for.

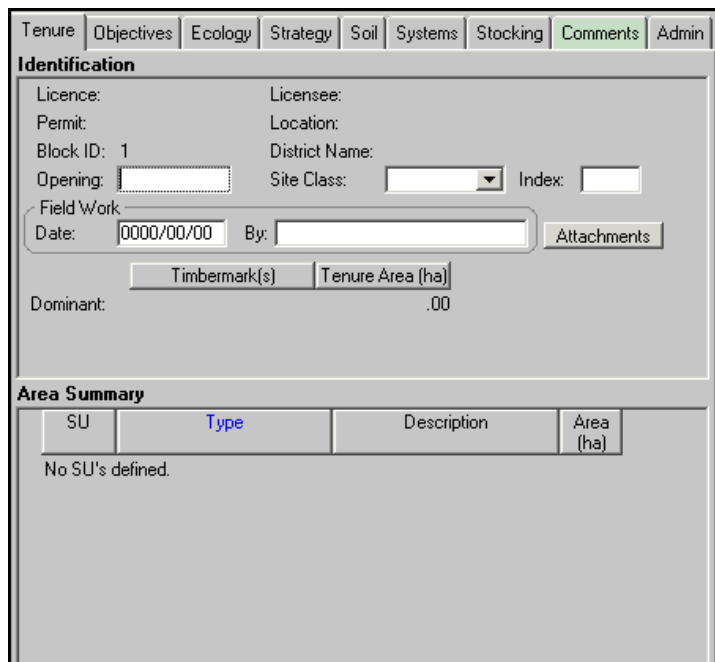
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3. Create Standards Unit records (to be done prior to spatial data loading)

Silviculture Activities window – double-click **Plan** under Base Activity and **SP** window will appear.

SP window - Tenure tab

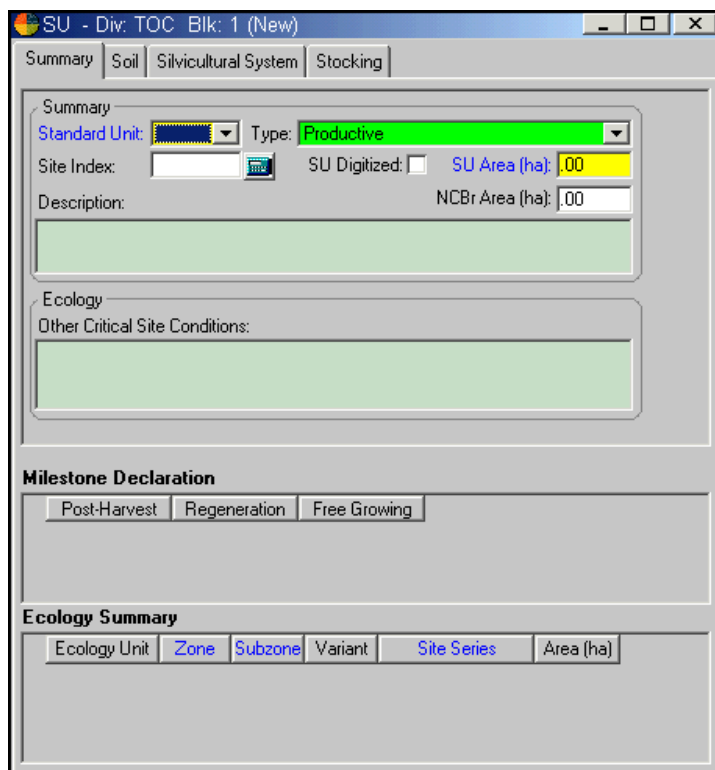


Enter Field Work Date and By information
(Layout contractor)

Click under the Area Summary headers
(will be highlighted in blue)

Click **Insert Record** button to bring up an
SU (Standards Unit) New Record window

SU Window – Summary Tab



Select a label for your Productive SUs and
select **Productive** from the **Type** drop-down
and add description/comments. **Save.**

DO NOT enter SU Area.

Wildlife Tree Retention Areas, Reserve
Areas and Roads (PAS) are all considered
SUs in Genus. Since these are non-
productive SUs they do not need numbers
but will be defined by a descriptive label.

Select the appropriate label from the
dropdown.

**Save. This is all that is necessary for
tabular entry prior to spatial data
loading**

The Ecology Summary will be filled in after
spatial data is entered, and GIS staff create
the link. Do not enter new data in this area!

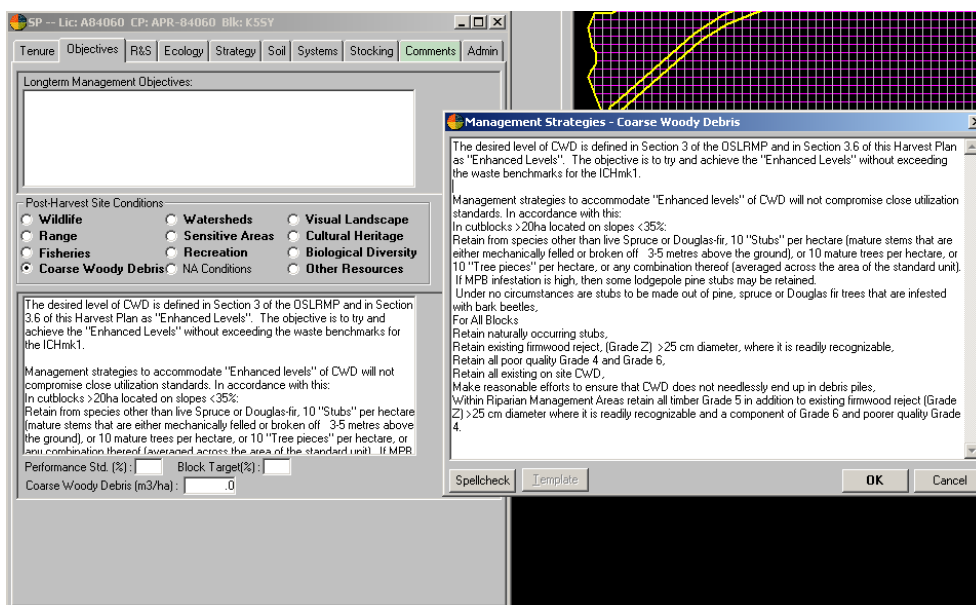
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4. Enter Objectives Data

SP window – Objectives tab

- Complete Long-term Management Objectives text box
- Complete Post Harvest Site Conditions text box for each selected resource. Sections with information will be indicated in **bold**.
- Right-click in the text box to use the Cut, Copy, and Paste commands to copy and paste information from other sources (e.g. SilvRx, Word, PDFs) into Genus.
- Double-click on the text-field to type in a larger window and gain access to the **Spellcheck** function.



The screenshot shows the 'SP' window with the 'Objectives' tab selected. The 'Long-term Management Objectives' text box is empty. Below it, the 'Post-Harvest Site Conditions' section has several radio buttons: 'Wildlife', 'Range', 'Fisheries', 'Coarse Woody Debris' (selected), 'Watersheds', 'Sensitive Areas', 'Recreation', 'NA Conditions', 'Visual Landscape', 'Cultural Heritage', 'Biological Diversity', and 'Other Resources'. The 'Coarse Woody Debris' section is expanded, showing a text box with the following content:

The desired level of CWD is defined in Section 3 of the OSLRMP and in Section 3.6 of this Harvest Plan as "Enhanced Levels". The objective is to try and achieve the "Enhanced Levels" without exceeding the waste benchmarks for the ICHmk1.

Management strategies to accommodate "Enhanced levels" of CWD will not compromise close utilization standards. In accordance with this:

In cutblocks >20ha located on slopes <35%:

Retain from species other than live Spruce or Douglas-fir, 10 "Stubs" per hectare (mature stems that are either mechanically felled or broken off 3-5 metres above the ground), or 10 mature trees per hectare, or 10 "Tree pieces" per hectare, or any combination thereof (averaged across the area of the standard unit). If MPB infestation is high, then some lodgepole pine stubs may be retained.

Under no circumstances are stubs to be made out of pine, spruce or Douglas fir trees that are infested with bark beetles.

For All Blocks:

Retain naturally occurring stubs.

Retain existing firmwood reject, (Grade Z) >25 cm diameter, where it is readily recognizable.

Retain all poor quality Grade 4 and Grade 6.

Retain all existing on site CWD.

Make reasonable efforts to ensure that CWD does not needlessly end up in debris piles.

Within Riparian Management Areas retain all timber Grade 5 in addition to existing firmwood reject (Grade Z) >25 cm diameter where it is readily recognizable and a component of Grade 6 and poorer quality Grade 4.

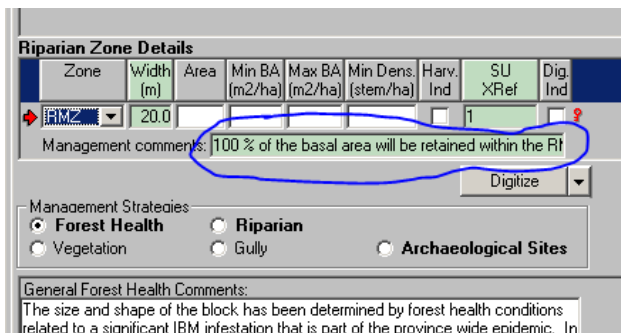
Performance Std. (%): Block Target(%):

Coarse Woody Debris (m3/ha):

The 'Management Strategies - Coarse Woody Debris' dialog box is open, showing the same text as the expanded section in the main window. It has 'Spellcheck' and 'Template' buttons on the left, and 'OK' and 'Cancel' buttons on the right.

5. Enter Strategy Data

SP Window – Strategy tab – Riparian Areas



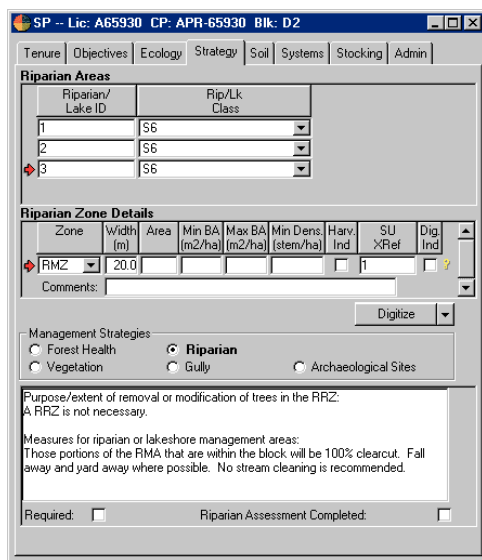
Click in Riparian Areas (will be highlighted in blue)

Insert Record and enter Riparian/Lake ID and select Rip/LK Class

Next click in Riparian Zone Details (will be highlighted in blue)

Insert Record and select **Zone** from drop-down list

In the Riparian Zone Details, click on the **Key** icon to enter comments specific to that Riparian Zone. (Double-click in the text box to get a larger window).



After entry of Riparian Zones is complete, enter comments for all Management Strategies.

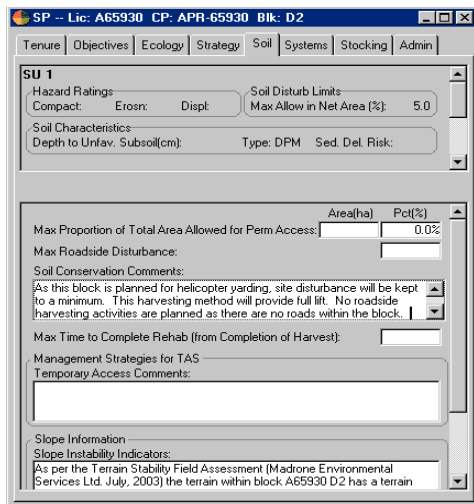
Note: Since there are no fields for Fire Hazard Abatement, enter these in the **Objectives** tab under **Other Resources**. Coarse Woody Debris Strategies can be entered in the **Objectives** tab under **Coarse Woody Debris**. Windthrow can be entered in the **Strategy** tab under **Forest Health**.

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6. Enter Soils Data

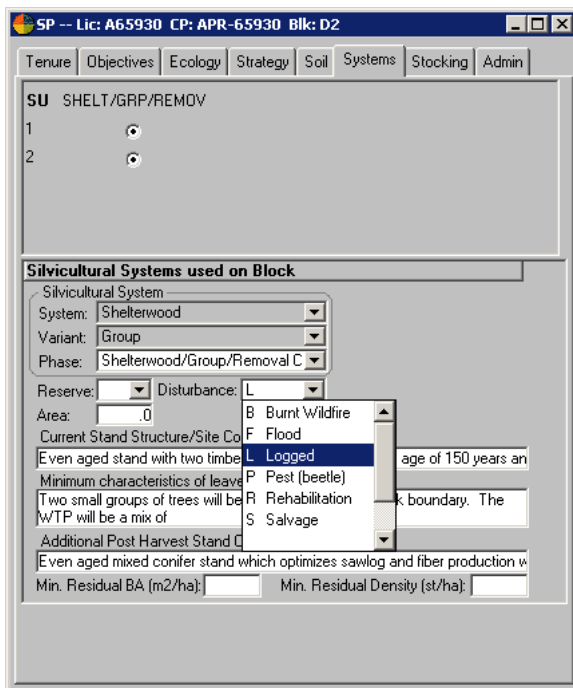
SP Window – Soils tab



Enter PAS area and percentage of block.

Enter Soil Conservation, Temporary Access and Slope Information comments as necessary.

7. Enter Systems Data



SP window – Systems tab

This information is required for the **Disturbance** report/**Harvesting** activity submissions.

Click in the **Silvicultural Systems Used on Block** section (highlighted in blue)

Insert Record to add required silvicultural systems

Add **System/Variant/Phase** and comments for each silvicultural system.

In the top section, the newly created systems and radio buttons appear. Select a silvicultural system for each SU by clicking a radio button.

Ensure **Disturbance** has a value selected from the dropdown. In most cases this should be **L-Logged**.

Enter comments in appropriate sections.

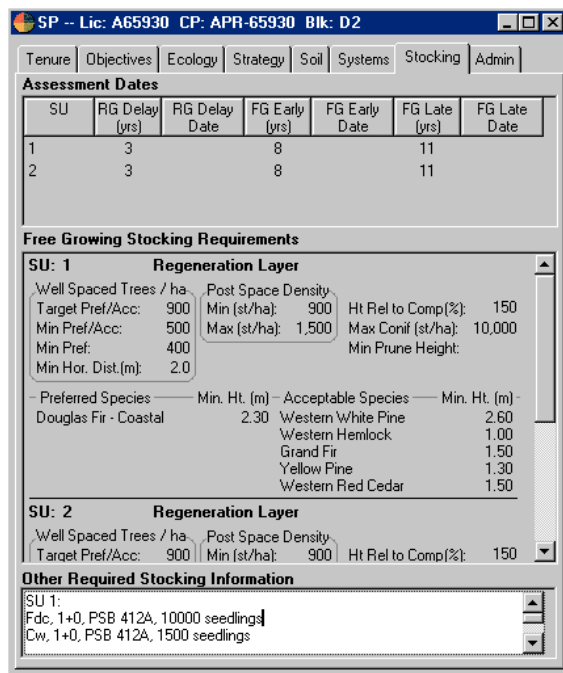
Click Save.

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8. Enter Stocking Data

SP Window – Stocking tab



SU	RG Delay (yrs)	RG Delay Date	FG Early (yrs)	FG Early Date	FG Late (yrs)	FG Late Date
1	3		8		11	
2	3		8		11	

Free Growing Stocking Requirements

SU: 1 Regeneration Layer

Well Spaced Trees / ha: 900 Post Space Density: 900 Ht Rel to Comp(%): 150
 Target Pref/Acc: 500 Min (st/ha): 1,500 Max Conif (st/ha): 10,000
 Min Pref: 400 Min Hor. Dist (m): 2.0
 Min Prune Height: 1.50

Preferred Species: Douglas Fir - Coastal Min. Ht. (m): 2.30 Acceptable Species: Western White Pine, Western Hemlock, Grand Fir, Yellow Pine, Western Red Cedar Min. Ht. (m): 2.60, 1.00, 1.50, 1.30, 1.50

SU: 2 Regeneration Layer

Well Spaced Trees / ha: 900 Post Space Density: 900 Ht Rel to Comp(%): 150
 Target Pref/Acc: 900 Min (st/ha): 900

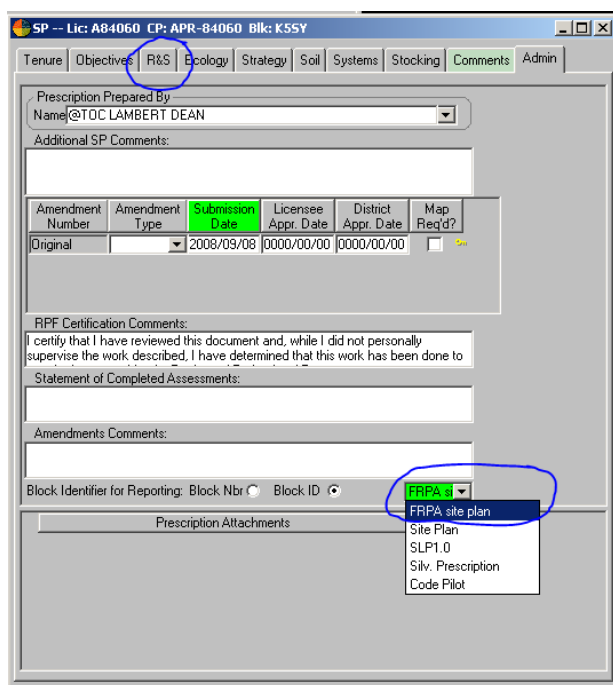
Other Required Stocking Information

SU 1:
 Fdc, 1+0, PSB 412A, 10000 seedlings
 Cw, 1+0, PSB 412A, 1500 seedlings

Enter additional comments in the **Other Required Stocking Information**, such as Seedling Requirements. This should also be copied to the comments for any planting activities in the Silviculture Activity window, since sowing will be determined by running reports on planned planting.

9. Enter Admin Data

SP Window – Admin tab



Prescription Prepared By: Name@TOC LAMBERT DEAN

Additional SP Comments:

Amendment Number	Amendment Type	Submission Date	Licensee Appr. Date	District Appr. Date	Map Req'd?
Original		2008/09/08	0000/00/00	0000/00/00	☒

RPF Certification Comments:
 I certify that I have reviewed this document and, while I did not personally supervise the work described, I have determined that this work has been done to

Statement of Completed Assessments:

Amendments Comments:

Block Identifier for Reporting: Block Nbr ☐ Block ID ☒ **FRPA site plan**

Prescription Attachments:

Enter administrative details, including the RPF who prepared the prescription in the **Prescription Prepared by – Name** field. If the RPF's name does not appear in the dropdown list, contact your local Genus administrator to have their name added to the maintenance tables.

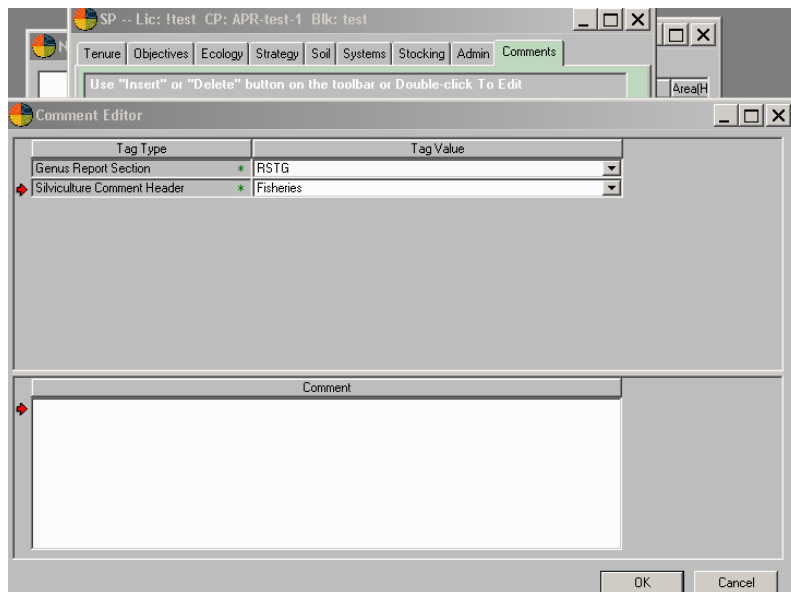
For amendments click in the **Amendment Number** section (will be highlighted in blue)

Insert Record and enter required dates.

Block Identifier for Reporting – indicate whether **Block Nbr** or **Block ID** is used, and in the dropdown whether this is a **FPC Site Plan**, **FRPA Site Plan** or **Silviculture Prescription** (If the block is assigned to an operating plan and FSP in the planning module, select **FRPA Site Plan**. This will trigger the R&S tab to appear in the Plan window which displays and allows for the editing of any Results and Strategies applied at the FSP and Operating Plan level).

10. Enter FSP Results and Strategies Comments

SP Window – Comments tab



This tab is intended to capture the FSP results and strategies that are applicable to the Site Plan.

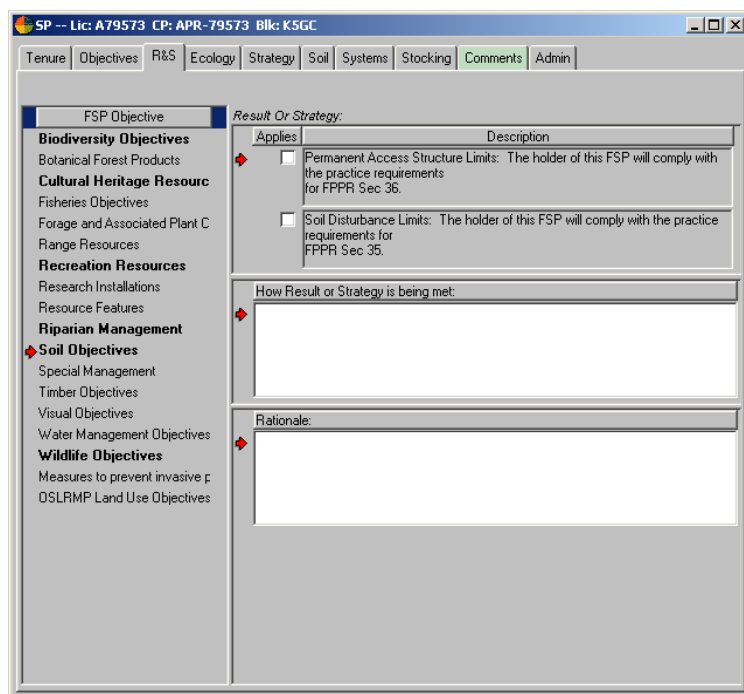
Click ‘insert record’ and select the ‘tag type’ that you wish to enter. The Genus report section defines what section the item will appear in in the SP document and the Silv Comment Header provides a sub-heading.

Enter all descriptive information in the comments box at the bottom of the screen for the Comment Header you have chosen. Click “OK” This will return you to the main “Comment Summary” where you can view the entry you have made. To enter the next Result or Strategy,

Click “Insert Record” and repeat the process until all of your Results and Strategy comments have been entered. Save all entries.

11. FSP Results and Strategies– R&S Tab

SP Window – R&S tab



This tab is intended to populate Results and Strategies for blocks that have been assigned to an Operating Plan and FSP. The Results and Strategies are assigned to the FSP in the planning module and propagate down to the block Site Plan level accordingly when that block is assigned to an Operating Plan or directly to the FSP in the planning module.

The R&S interface allows the user to turn on & off R&S’s that have been assigned at the FSP level as necessary.

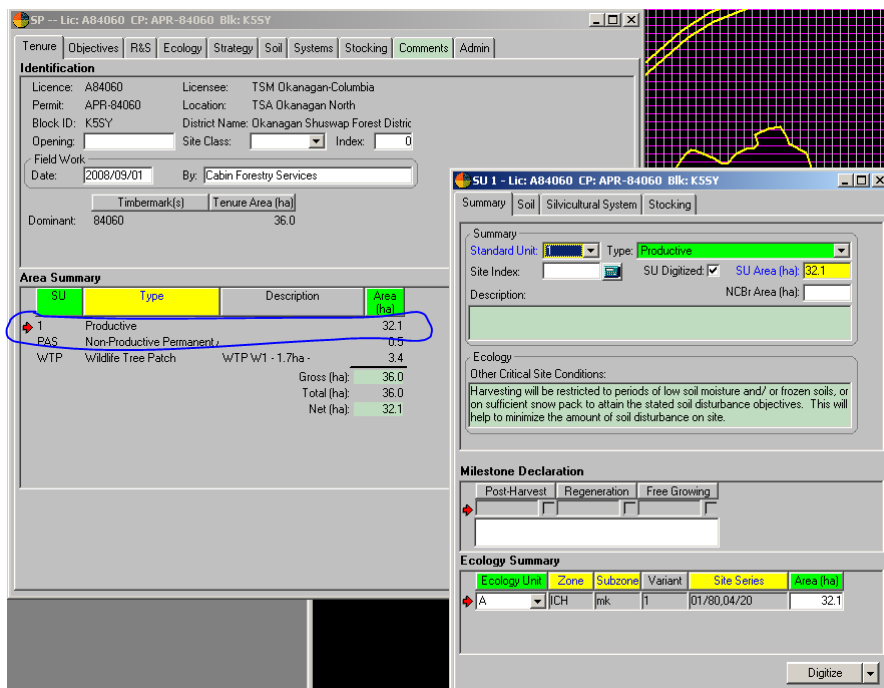
Note: User has to supply a description and rationale of how the Result and Strategy is going to be met in the event the FSP assigned R&S does not apply before the record can be successfully saved.

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12. Individual SU Data entry

SU Window – Summary tab

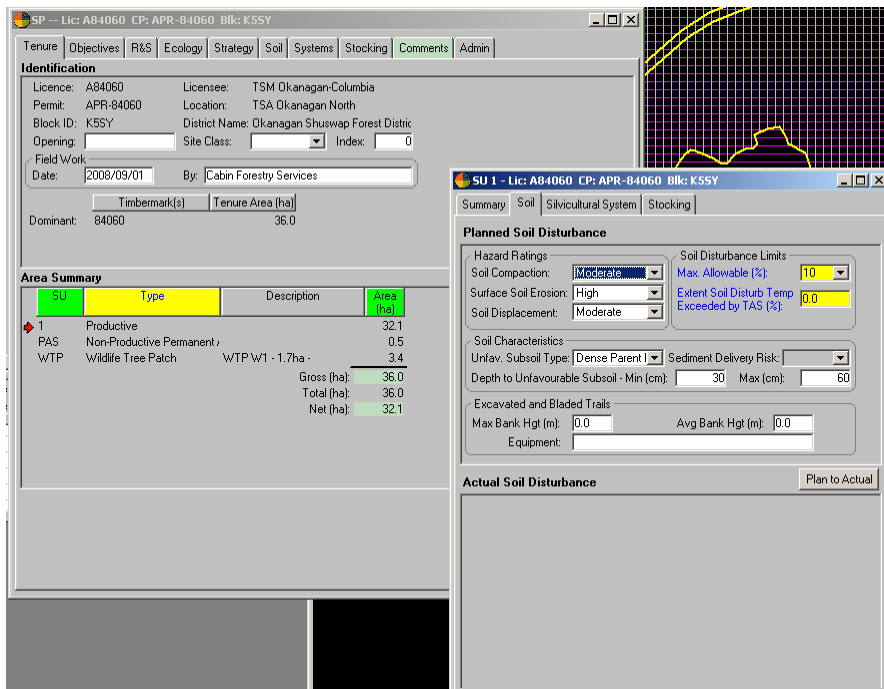


SU	Type	Description	Area (ha)
Productive			32.1
PAS	Non-Productive Permanent		0.5
WTP	Wildlife Tree Patch	WTP W1 - 1.7ha	3.4
Gross (ha):			36.0
Total (ha):			36.0
Net (ha):			32.1

Now all information pertaining to the Block level Site Plan has been entered into the Plan window. It is now time to enter information pertaining to individual SU's into the system.

Click on the **Tenure** tab of the Plan window to display the Area Summary. Double click on the first productive SU to bring up the SU window with the Summary tab displayed. Enter appropriate data for description if applicable and Other Critical Site Conditions (soil disturbance restrictions etc).

SU Window – Soils tab



SU	Type	Description	Area (ha)
Productive			32.1
PAS	Non-Productive Permanent		0.5
WTP	Wildlife Tree Patch	WTP W1 - 1.7ha	3.4
Gross (ha):			36.0
Total (ha):			36.0
Net (ha):			32.1

Enter appropriate data including:

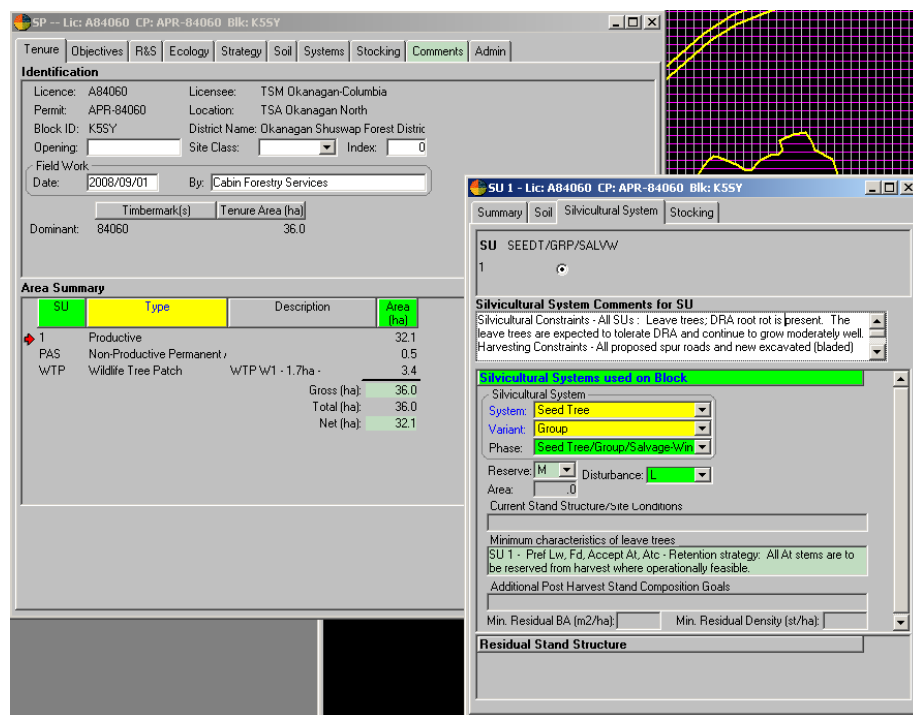
- Soil Compaction
- Surface Soil Erosion
- Soil Displacement
- Unfav. Subsoil Type
- Sediment Delivery Risk (if applicable)
- Depths to Unfav. Subsoil
- Soil Disturbance Limits

Note: Some of this information will populate the **Soils** tab in the **SP** window.

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SU Window – Silviculture System tab



Identification

Licence: A84060 Licensee: TSM Okanagan-Columbia
 Permit: APR-84060 Location: TSA Okanagan North
 Block ID: K5SY District Name: Okanagan Shuswap Forest District
 Opening: Site Class: Index: 0
 Field Work: Date: 2008/09/01 By: Cabin Forestry Services
 Timbermark(s): Tenure Area (ha):
 Dominant: 84060 36.0

Area Summary

SU	Type	Description	Area (ha)
1	Productive		32.1
PAS	Non-Productive Permanent		0.5
WTP	Wildlife Tree Patch	WTPW1 - 1.7ha	3.4
		Gross (ha):	36.0
		Total (ha):	36.0
		Net (ha):	32.1

SU 1 - Lic: A84060 CP: APR-84060 Blk: K5SY

Summary Soil Silvicultural System Stocking

SU SEEDT/GRP/SALVW
1

Silvicultural System Comments for SU
 Silvicultural Constraints - All SUs: Leave trees: DRA root rot is present. The leave trees are expected to tolerate DRA and continue to grow moderately well.
 Harvesting Constraints - All proposed spur roads and new excavated (bladed)

Silvicultural Systems used on Block

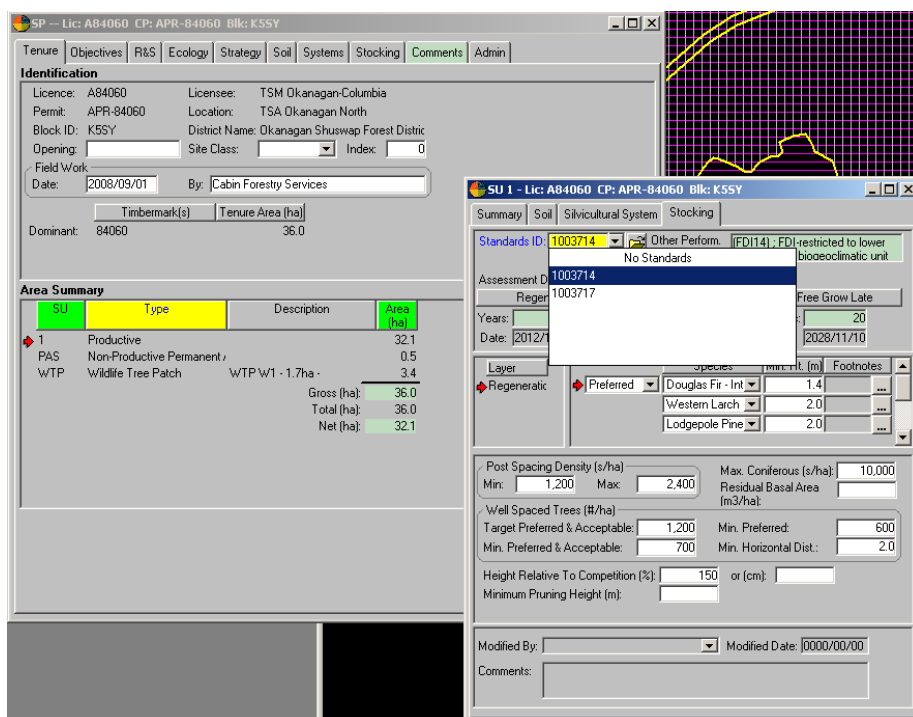
Silvicultural System:
 System: Seed Tree
 Variant: Group
 Phase: Seed Tree/Group/Salvage Win
 Reserve: M Disturbance: L
 Area: 0
 Current Stand Structure/site Conditions:
 Minimum characteristics of leave trees
 SU 1 - Pref Lw, Fd, Accept At, Atc - Retention strategy: All At stems are to be reserved from harvest where operationally feasible.
 Additional Post Harvest Stand Composition Goals:
 Min. Residual BA (m²/ha): Min. Residual Density (st/ha):

Residual Stand Structure

Enter appropriate data into the Silvicultural System Comments for SU box (usually the Silvicultural & Harvesting Constraints from the Site Plan document).

Note: The data in the lower half of this window is populated from the Systems data entered into the Plan window in Step #8.

SU Window – Stocking tab



Identification

Licence: A84060 Licensee: TSM Okanagan-Columbia
 Permit: APR-84060 Location: TSA Okanagan North
 Block ID: K5SY District Name: Okanagan Shuswap Forest District
 Opening: Site Class: Index: 0
 Field Work: Date: 2008/09/01 By: Cabin Forestry Services
 Timbermark(s): Tenure Area (ha):
 Dominant: 84060 36.0

Area Summary

SU	Type	Description	Area (ha)
1	Productive		32.1
PAS	Non-Productive Permanent		0.5
WTP	Wildlife Tree Patch	WTPW1 - 1.7ha	3.4
		Gross (ha):	36.0
		Total (ha):	36.0
		Net (ha):	32.1

SU 1 - Lic: A84060 CP: APR-84060 Blk: K5SY

Summary Soil Silvicultural System Stocking

Standards ID: 1003714 Other Perform. FDI14: FDI-restricted to lower biogeoclimatic unit
 No Standards
 Assessment D: 1003714 Free Grow Late
 Regener: 1003717
 Years: 2021/2022
 Date: 2028/11/10

Layer: Regeneratic
 Preferred Douglas Fir - Int 1.4
 Western Larch 2.0
 Lodgepole Pine 2.0

Post Spacing Density (s/ha):
 Min: 1,200 Max: 2,400 Max. Coniferous (s/ha): 10,000
 Residual Basal Area (m³/ha):
 Well Spaced Trees (#/ha):
 Target Preferred & Acceptable: 1,200 Min. Preferred: 600
 Min. Preferred & Acceptable: 700 Min. Horizontal Dist.: 2.0
 Height Relative To Competition (%): 150 or (cm):
 Minimum Pruning Height (m):

Modified By: Modified Date: 0000/00/00
 Comments:

Select the Standards ID from the available Standards in the dropdown.

Note: The list of available Stocking Standard ID's that appears in the dropdown is directly controlled by the Ecology data that was entered in Step #3. If the desired Stocking Standard is not being displayed, review and edit the Ecology data to ensure that the correct Stocking Standard is available. Also ensure that the Populate has been performed on the Ecology tab of the Plan window.

Any stocking standard variations can be entered in this window accordingly.

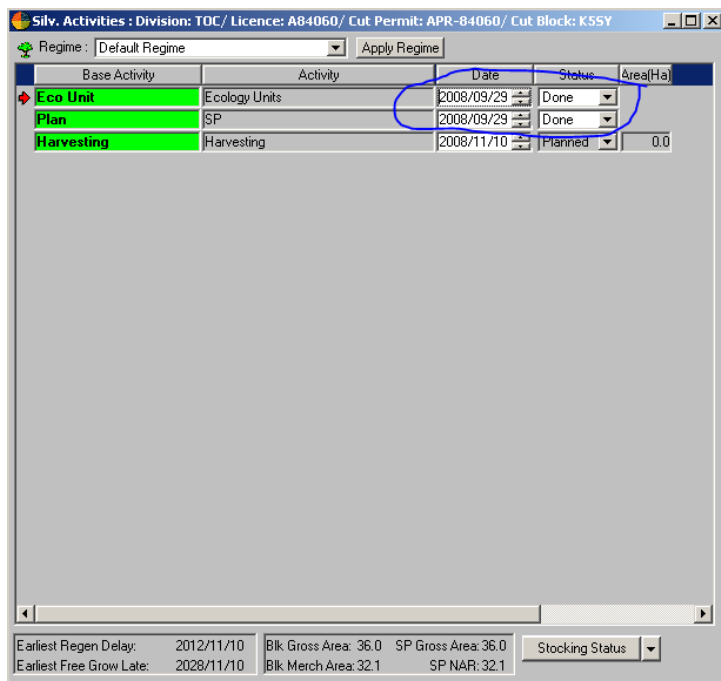
Note: If there are any variations to the Stocking Standard selected, the **Modified By**, **Modified Date** and **Comments** fields must be filled out before the record can be saved.

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13. Site Plan Entered Dates

Silv Activities Window



Base Activity	Activity	Date	Status	Area(Ha)
Eco Unit	Ecology Units	2008/09/29	Done	
Plan	SP	2008/09/29	Done	
Harvesting	Harvesting	2008/11/10	Planned	0.0

Regime: Default Regime Apply Regime

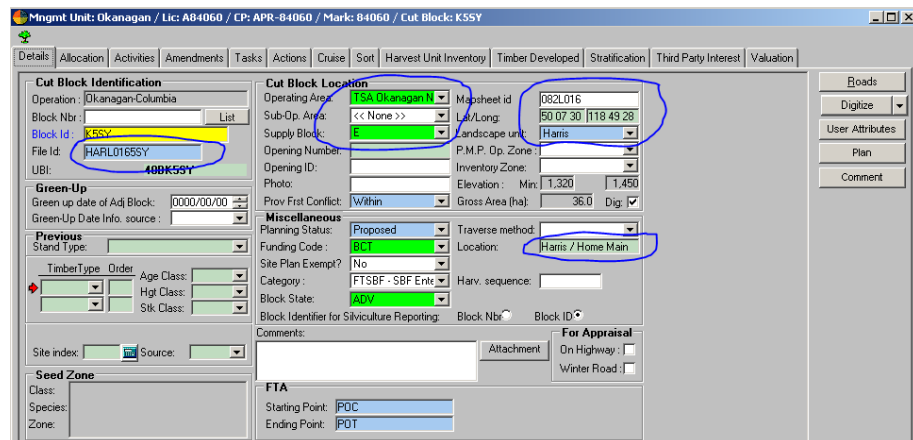
Earliest Regen Delay: 2012/11/10 Blk Gross Area: 36.0 SP Gross Area: 36.0
 Earliest Free Grow Late: 2028/11/10 Blk Merch Area: 32.1 SP NAR: 32.1

Return to the main Silviculture Activities Window, enter the data entry date in the **Date** section for **Eco Unit & Plan** of the Silv. Activities window and change the **Status** to Done.

Close the Silv. Activities window and proceed to next step.

14. Miscellaneous Block Details

Block Details window– Details tab.



Mngmt Unit: Okanagan / Lic: A84060 / CP: APR-84060 / Mark: 84060 / Cut Block: K55Y

Details Allocation Activities Amendments Tasks Actions Cruise Sort Harvest Unit Inventory Timber Developed Stratification Third Party Interest Valuation

Cut Block Identification
 Operation: Okanagan-Columbia
 Block Nbr: [List]
 Block Id: K55Y
 File Id: HARL016SSY
 UBI: 488K55Y

Green-Up
 Green up date of Adj Block: 0000/00/00
 Green-Up Date Info. source: []

Previous
 Stand Type: []

Seed Zone
 Class: []
 Species: []
 Zone: []

Cut Block Location
 Operating Area: TSA Okanagan N
 Sub-Op. Area: << None >>
 Supply Block: E
 Opening Number: []
 Opening ID: []
 Photo: []
 Prov Frst Conflict: Within
 Meshsheet id: 082L016
 Lat/Long: 50 07 30 / 118 49 28
 Landscape unit: Harris
 P.M.P. Op. Zone: []
 Inventory Zone: []
 Elevation: Min: 1,320 Max: 1,450
 Gross Area (ha): 36.0 Dig: []

Miscellaneous
 Planning Status: Proposed
 Funding Code: BCT
 Site Plan Exempt? No
 Category: FTSBF - SBF Entic
 Block State: ADV
 Block Identifier for Silviculture Reporting: Block Nbr: [] Block ID: []
 Comments: []
 Attachment: []
 For Appraisal: On Highway: [] Winter Road: []

Boards
 Digitize
 User Attributes
 Plan
 Comment

Enter any applicable data from the Site Plan document into the corresponding fields in the Block Details window as shown to the left.

Congratulations! Site Plan data entry is now complete.

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15. Generate and Print a Site Plan report

In Genus select Reports/Silviculture/SitePlan from the menu

- Type in a report title
- Select the elements to be printed in the "Site Plan Reports" section
- Check Assessments & decide which are needed
- Choose the block to print in Licence Navigator
 - first, uncheck all blocks before choosing a new block or else site plans for multiple blocks could be generated with incorrect results!
 - Then navigate to the required block by clicking on the + signs in the nav tree BEFORE checking the box next to the block you want.
- Click on the icon in top left-hand corner to generate site plan 
- In most cases it is not necessary to save the file.**
- Print, Print Setup and Print Preview are under File in the menu options

Site Plan

Templates: Save As... Delete
+Amend_SP_TCC_WL

Report Title
A86427-K67N

Site Plan Reports

- A. TENURE IDENTIFICATIONS ☒
- B. AREA UNDER PLAN ☒
- C. RETENTION REQUIREMENTS ☒
- D. STOCKING REQUIREMENTS ☒
- E. ASSESSMENTS ☒
- F. SOIL CONSERVATION ☒
- G. ECOLOGY ☒
- H. SILVICULTURE SYSTEMS ☒
- I. RIPARIAN ☒
- K. ADMINISTRATION ☒
- L. ATTACHMENTS ☒

Assessments

License Navigator

- ☐ A85499
- ☐ A85655
- ☐ A86028
- ☒ A86427
 - ☒ APR-86427
 - ☒ 86427
 - ☒ K67N
- ☐ A86428
- ☐ A86429

A86427-K67N
Original
TSM Okanagan-Columbia

A. TENURE IDENTIFICATIONS

FOREST DISTRICT	LICENCE	CUTTING PERMIT	TIMBERMARK	BLOCK	OPENING NUMBER	
Okanagan Shuswap Fores	A86427	APR-86427	86427	K67N	SKHE04467N	Skaha

B. AREA UNDER PLAN

SU	PAS	Rock	Swamp/ wetland	Reserves	Other NP Natural	Other NP Unnatural	Others	NAR	NCBR within NAR
1								38.3	
WTRA	0.0	0.0	0.0	4.8	0.0	0.0	0.0	0.0	
TOTAL	0.0	0.0	0.0	4.8	0.0	0.0	0.0	38.3	0.0

Total Area under Plan: 43.1

C. RETENTION REQUIREMENTS

Biodiversity: Performance Standard (%): Block Target (%):
Intermediate emphasis zone as per LRMP Guidelines.

Coarse Woody Debris: Performance Standard (%): Block Target (%):
To mitigate the effects of harvesting on small mammal habitat, "Enhanced" levels of coarse woody debris will be retained as specified in Strategy section of this SP. It is anticipated that the size and distribution of CWD will be similar to pre-harvest levels.

D. STOCKING REQUIREMENTS