

Nutrient Management Downloadable Spreadsheet

Technical Guide: Export/Import Process

Virginia Department of Conservation and Recreation — Division of Soil and Water Conservation

Overview

The Nutrient Management Downloadable Spreadsheet (NMDS) is an alternative tool for viewing and writing a Nutrient Management Plan (NMP) in conjunction with DCR's Conservation Application Suite (CAS). The NMDS is a Microsoft Excel-based application that exports NMP data from CAS and populates a spreadsheet template, which can then be used to complete the NMP on the user's desktop. Once finalized, the NMDS is imported back into CAS to finish the plan-writing process.

Key capabilities of the NMDS include:

- Instant nutrient balance calculations in a familiar spreadsheet format.
- No internet connection required after the initial download.
- Access to phosphorus assessment tools such as the P-Index without delay.
- Support for spreadsheet features like filtering and drag-down entry to streamline nutrient applications.

This guide provides detailed instructions on how to export, use, and reimport the NMDS into CAS. It assumes that the user is familiar with creating and writing an NMP in CAS, and has basic knowledge of Microsoft Excel (desktop, latest versions).

Technical Notes and Contacts

Access & Training

The NMDS is not a stand-alone application — CAS login credentials are required. For access and training, contact Stephanie Dawley, NM Training and Certification Coordinator: Stephanie.Dawley@dcr.virginia.gov.

CAS Technical Support

For technical issues related to CAS, contact the CAS Help Desk: dswc-cas-help@dcr.virginia.gov.

NMDS-Specific Issues

For issues specific to the NMDS, contact Joe Tesauro, Business Systems Analyst: Joe.Tesauro1@dcr.virginia.gov.

File Compatibility

The NMDS downloads as a .xlsb file and requires a desktop installation of Microsoft Excel. The NMDS is NOT compatible with Microsoft 365 Online Excel or Google Sheets.



Figure 1 — NMP Export/Import (NMDS) Workflow

Section 1: Pre-Export

To begin, the planner must have an NMP in CAS. Existing NMPs can be exported into an NMDS to make further revisions. If no existing NMP is available, the planner should create a new NMP in CAS as usual before proceeding.

Understanding "Core" NMP Data

The following plan information is classified as **core data** and must be entered through CAS before a functional NMDS can be exported and used to finish writing the NMP:

- Fields must be mapped.
- Manure Storage Units must be mapped (if applicable).
- Previous Condition data must be entered (if applicable).
- Soil Test data must be entered.
- Crop Rotation data must be entered.
- User-adjusted yield data must be entered (if applicable).
- User-adjusted crop N need data must be entered (if applicable).
- Animal data must be entered (if applicable).
- Manure Storages data must be entered (if applicable).
- Imported Manure data must be entered (if applicable).
- Biosolids data must be entered (if applicable).

CAS Reference

For technical assistance entering core data in CAS, refer to the existing technical documentation for the Nutrient Management Module.

Core plan data is **only editable through CAS**. If any of this information changes during the plan-writing process or over the life of the NMP (for example, if fields are added or removed, or soil tests are updated), the planner must make those edits in CAS. A new NMDS can then be exported containing the updated core data.

Section 2: Exporting the NMDS

After all core NMP data has been entered in CAS, the user may export an NMDS at any time by following the steps below.

1 Open the Export/Import Function

Select the Export/Import function from the bottom of the navigation bar on the left-hand side of the CAS screen.



Figure 2 — Export/Import navigation option in CAS

2 Initiate the Export

The Export NMP window will appear, explaining the process. Select the Export button — the NMDS (.xlsb file) will be sent to the planner's email address once the export is complete.

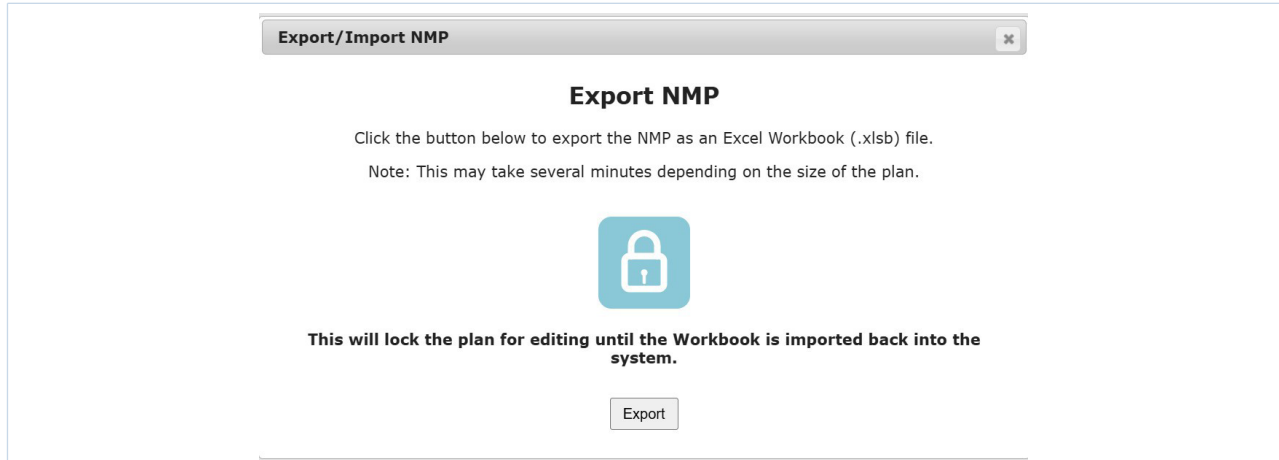


Figure 3 — Export NMP dialog window

3 Download and Open the NMDS File

Once the email is received, download the .xlsb file to the desktop and open it using Microsoft Excel (desktop version required).

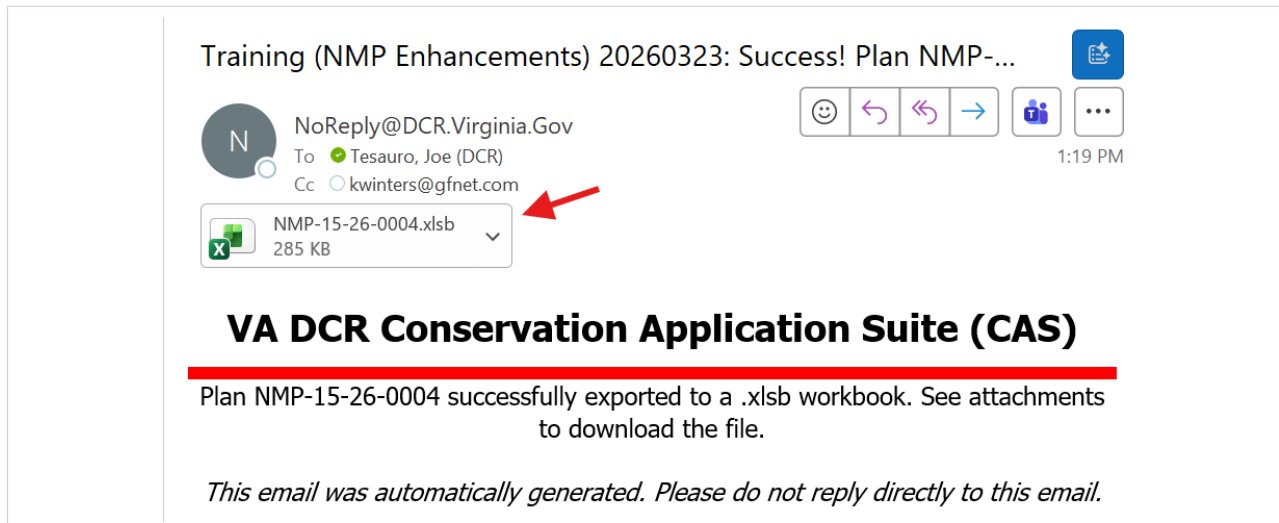


Figure 4 — Export confirmation email with attached NMDS file

Understanding 'Locked' Plan Status

Once an NMDS has been exported, the NMP becomes **locked** in CAS. This prevents users from making changes in CAS that would not be reflected in the exported spreadsheet, ensuring data integrity throughout the process.

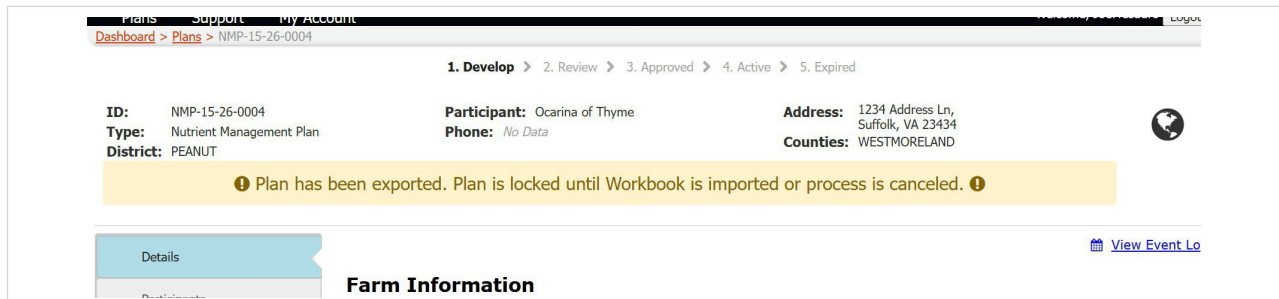


Figure 5 — Locked plan status indicator in CAS

The NMP cannot be edited in CAS again until one of the following actions is taken:

- a. The exported NMDS is imported back into CAS, fully updating the plan with all spreadsheet inputs (see Section 3 for import instructions).
- b. The export process is cancelled, returning control of the NMP to CAS and invalidating the previously exported NMDS file.

Cancelling the Export/Import Process

To cancel an in-progress export, select the Export/Import NMP function again and choose the Cancel Process option. A confirmation window will appear — the user must confirm the cancellation to proceed.

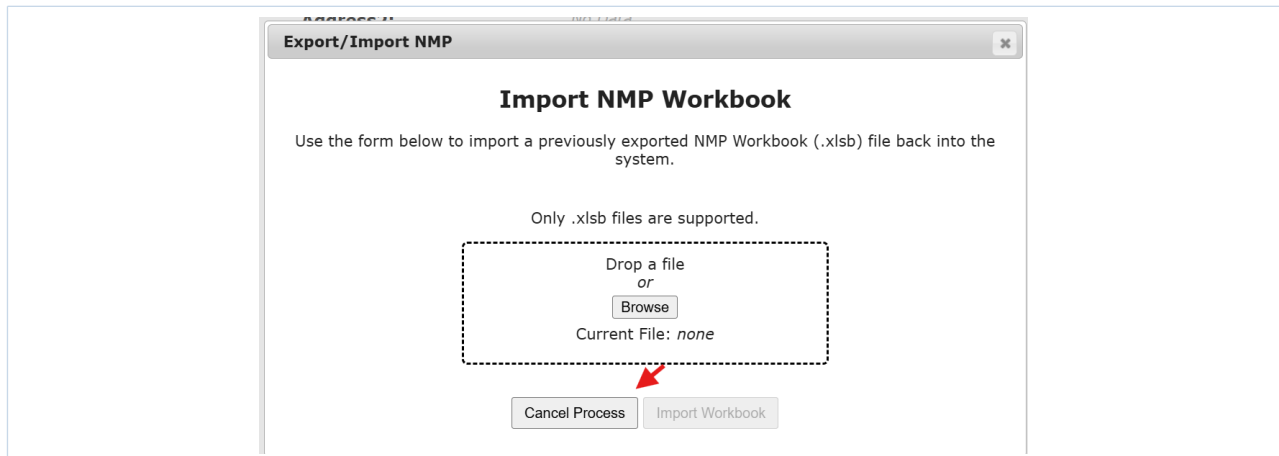


Figure 6 — Cancel Process confirmation dialog

■ **Important**

Once cancelled, the previously exported NMDS file can no longer be imported into CAS. If the NMDS is still needed, the export process must be restarted to generate a new file. Any edits made to the NMP in CAS after cancellation will be reflected in the newly exported file.

■ **Key Concept**

A unique ID is embedded in the .xlsb file at the time of export. Only the spreadsheet carrying that ID can be imported back into CAS — if the export is cancelled and the original file is submitted, the import will fail. Only one version of the NMDS can be active at any time, ensuring that all shared plan data between CAS and the NMDS remains current and valid. A user may make a backup copy of the downloaded NMDS if desired; the unique ID is preserved in copied files. The filename may also be renamed without affecting the Export/Import process.

Section 3: Importing the NMDS Back into CAS

Once all inputs to the NMP have been completed in the NMDS, the file can be imported back into CAS. This fully updates the plan with all spreadsheet inputs and enables the NMP to be finalized and moved to Review/Active status.

1 Open the Export/Import Function

Select the Export/Import function from the bottom of the navigation bar on the left-hand side of the CAS screen.



Figure 7 — Export/Import navigation option in CAS

2 Upload the NMDS File

Drag and drop the NMDS file into the upload window, or use the Browse option to locate it on your computer. Once the Current File name is displayed, select Import Workbook.

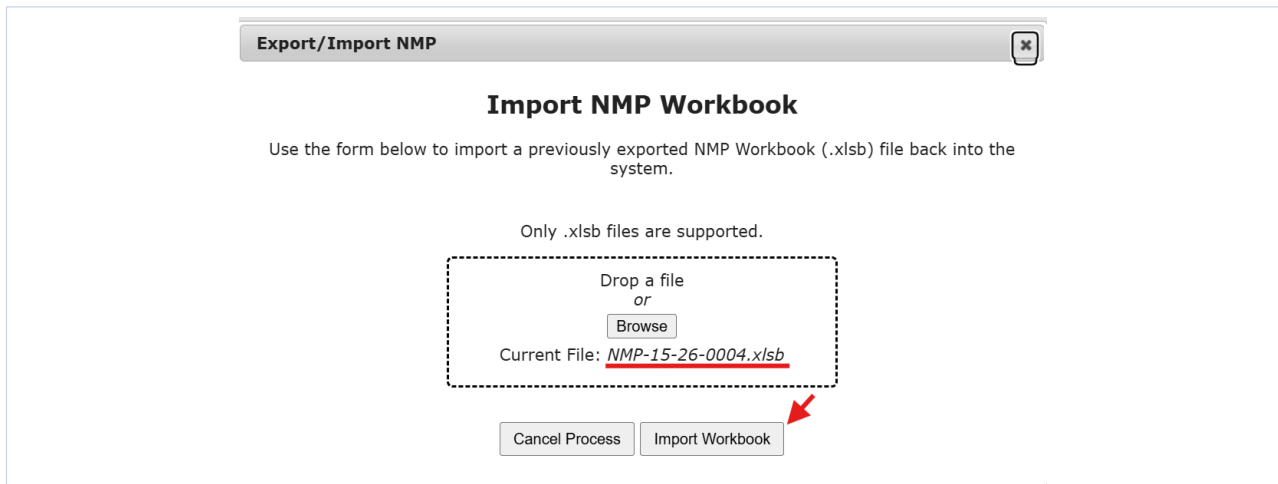


Figure 8 — Import Workbook dialog with file upload area

3 Confirm Successful Import and Complete the Plan

Once the import is complete, the NMP in CAS is updated with all data added or edited in the NMDS, and the plan status returns to Unlocked. From here, the user may make additional edits in CAS, enter a plan completion date in the Details tab, or generate plan reports.

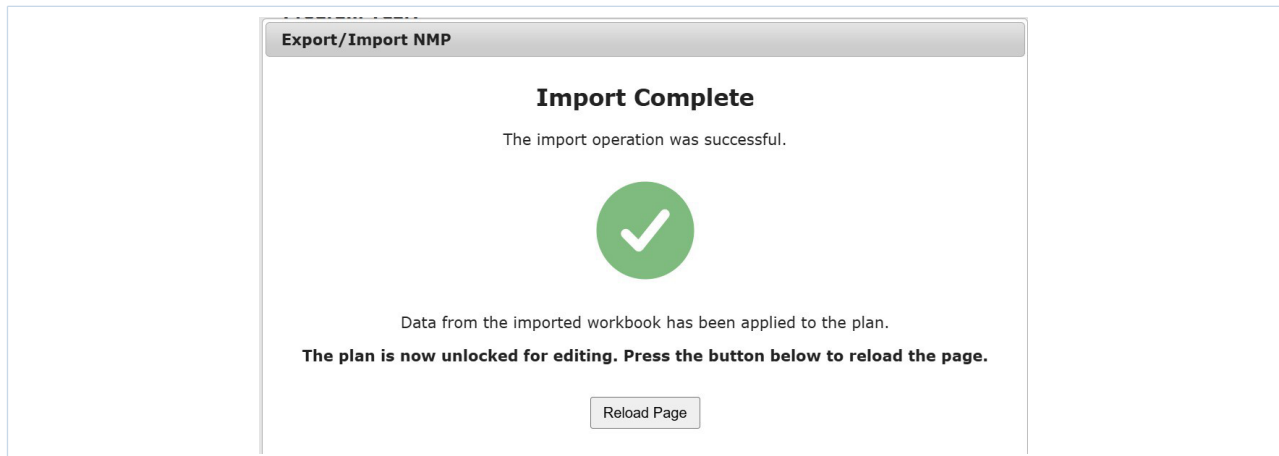


Figure 9 — Post-import plan status showing Unlocked state

Restarting the Export/Import Process

The Export/Import process can be initiated again at any point if additional changes are needed. However, once an NMDS file has been successfully imported, that file is no longer valid for re-import. A fresh export must be generated, which will include all data added to the NMP during the previous import.