Customer Service Toolkit

User's Guide

Version 3.1

Natural Resources Conservation Service
Information Technology Center
Fort Collins, Colorado

Version 3.1

Last modified on 03/26/03

Cyberfarm images courtesy of
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Contents

User Guide Format Conventions

User Guide Chapters and Sections

This guide is divided into chapters. Chapters are divided into sections, and some sections are divided into subsections, for example,

> ***Schedule Practices***
>
> **The Schedule Area**
>
> **Schedule Grid Rows**

References to chapters, sections, or subsections appear in Italics. Page headings refer to the chapters. The Contents page lists chapters and sections, but not subsections.

Instructions

Instructions appear under the heading *Step-by-Step Instructions.* Instructions are numbered consecutively. Follow the instructions in order unless instructed otherwise.

Dialog Boxes

Dialog box titles appear in Italics, for example,

> The *Practice Schedule* dialog box opens automatically at its maximum size.

Menu Items

Menu items appear in bold. The word *select* indicates the required action, for example,

> To print the plan, select the Excel **File** menu, then select **Print**.

Buttons and Tools

Button and tool names appear in bold. The word *click* indicates the required action. Example:

> Click the **Add Land Unit** button in the lower right corner to add a land unit.
>
> Click the **Text Box** tool  on the Drawing toolbar.

Tabs

A graphic that resembles a folder tab appears on some dialog boxes. Tab names appear in bold. The word *click* indicates the required action, for example,

> From the contact form, click the **Land Units** tab.

Special Emphasis

Some words appear in bold for special emphasis, for example,

> The **Practice Schedule** is accessed from Land Units tab on the customer's Outlook® contact, or from the Toolkit toolbar in ESRI® ArcView®.

File and Folder Names

References to the files created by the Customer Service Toolkit appear in bold. These references often include a phrase between two brackets, for example,

<contract identifier>.xls

The brackets indicate a changeable part of a file name. The example above means that the contract number will be the first part of the file name, and .xls will always be the file extension.

Overview of Conservation Reports

Toolkit 3.1 Changes

A summary of the changes follows. Refer also to the *Toolkit 3.1 Release Notes* on the Toolkit web site for a detailed list of enhancements and bug fixes:

http://www.itc.nrcs.usda.gov/toolkit/TK31RelsNotes.htm

- The Practice Scheduler saves the Additional Practice Narrative in the customer's database so that you can insert it into both the Plan and the Contract Excel Templates.
- The Plan Wizard templates now work with the additional narratives obtained from the Practice Scheduler.
- The Select Participant form now lets you choose between a customer's home, business, or other address when you generate the Conservation Plan.
- The Contract Wizard gives you more flexibility in assigning Item numbers to fields.
- Two new Long Term Conservation Contract templates are provided: AD-1155 and AD-1156.
- An Expand button lets you view tract numbers and land units in the practice list. A Collapse button restores the regular view.
- You can now modify amounts in the Component grid for non cost-shared practices.

A Five-Step Process

Use the Toolkit to develop, customize, and revise conservation reports including plans, contract support documents (AD-1155e), and contract revisions (AD-1156e). Creating plans and contracts with the Toolkit involves five steps: 1) add or edit land unit information, 2) schedule practices, 3) develop plans and contracts with wizards, 4) customize plans and contracts, 5) print the documents.

Step 1, Add or Edit Land Unit Information

Access mapped or unmapped land unit information from the **Land Units** tab on the customer's Outlook contact. Unmapped land units may be viewed, selected, added and deleted from the Land Units tab.

Information about land units includes tract and field numbers, land use, and acres. Land units entered in Outlook are referred to as **unmapped land units** because they have no corresponding digitized boundary. All land units that were transferred from FOCS are **unmapped.** Sites with digitized land units may use the **Land Units** tool in ArcView to enter information such as tract numbers, field numbers, and land use. Land units added in ArcView are called **mapped land units** because they have digitized boundaries. Mapped land units may be viewed and selected from the **Land Units** tab in Outlook, but changes to mapped land units must be made in ArcView.

Step 2, Schedule Practices

The **Practice Schedule** tool is accessed from Land Units tab on the customer's Outlook contact, or from the Toolkit toolbar in ArcView. Practices may be scheduled for both unmapped and mapped land units. After practices are scheduled, conservation plans and contracts may be developed with the Plan or Contract Wizard.

Step 3, Develop Plans and Contracts with Wizards

The **Plan Wizard** is accessed from the Practice Schedule. This wizard helps you develop a conservation plan document. Use the wizard to add header information, signature blocks, photos, and maps to conservation plans. The **Contract Wizard** is accessed from the Practice Schedule also. This wizard helps you develop contract support documents and revision documents. Use the wizard to develop contract items and signature blocks to contract documents.

Step 4, Customize Plans

The Toolkit provides several options for customizing the appearance of conservation plans including the ability to insert maps and photos, system narratives, and applied information.

Step 5, Print the Documents

The printing and formatting features of Excel are used to print conservation plans and contracts.

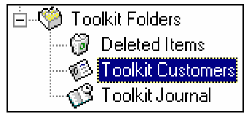
Locate Plans and Contracts

Conservation plans and contracts are located in each customer's folder. The instructions below show how to find these documents.

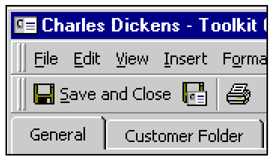
To view plans or contracts that were created originally in FOCS, you must first transfer FOCS data, then create a folder for the customer with the FOCS Data Transfer tool (refer to the *FOCS Data Transfer User's Guide).*

Step-by-Step Instructions to Locate a Plan

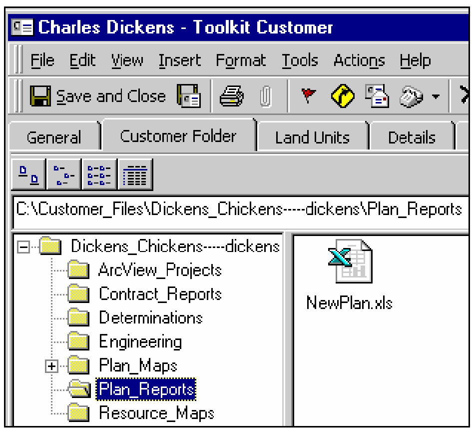
1. Start Outlook. Select the Toolkit Customers folder to display the list of contacts.



2. Locate the customer and double-click to open the contact form.
3. From the *Toolkit Customer* dialog box, click the **Customer Folder** tab.



4. Select the **Plan_Reports** folder. If the customer has a conservation plan, an icon is displayed in the right portion of the dialog box. Double-click the file to view it in Excel.



5. Click the **Contract_Reports** folder. If the customer has one or more contracts, an icon for each will be displayed in the right portion of the dialog box.
6. Double-click on a file to view it in Excel.

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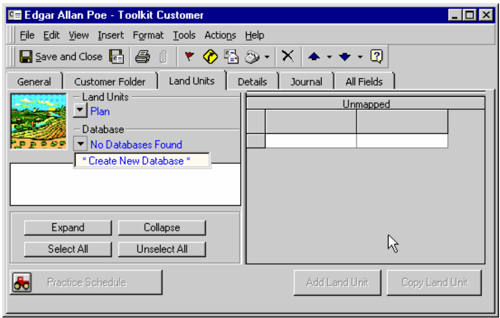
Add or Edit Land Units

The process of adding or editing land unit information varies somewhat depending on whether FOCS data was transferred or ArcView is installed. This chapter describes the process for each situation. Find the description that applies to your site, then complete the instructions at the end of the chapter.

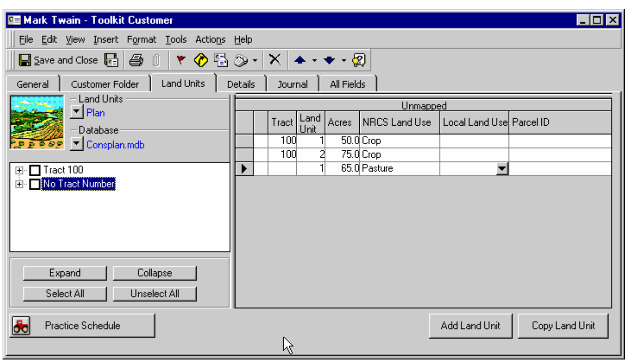
Sites WITHOUT FOCS Data and WITHOUT ArcView

These sites need to add land units for a customer from the Land Units tab before a practice schedule may be developed. When the Land Units tab is first opened, no land units appear.



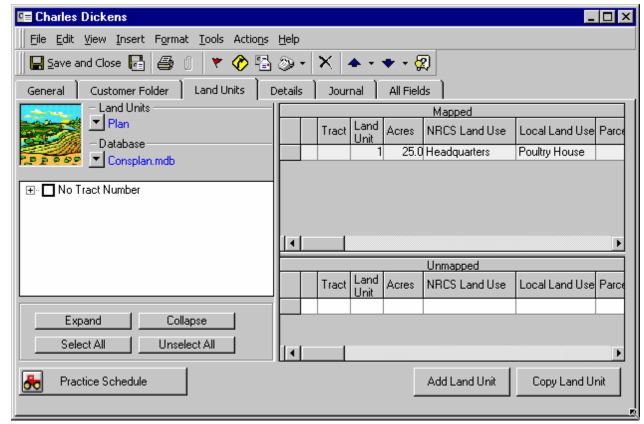
Sites WITH FOCS Data and WITHOUT ArcView

These sites may view a customer's land units that were transferred from FOCS by clicking on the Land Units tab in Outlook. Transferred land units appear under the heading, Unmapped, because they have not been digitized. To edit these land units or add new ones, follow the steps in Section *Add Land Units from Outlook*. To view the practice schedule for transferred land units, click the **Practice Schedule** button on the Land Units tab.



Sites WITHOUT FOCS Data and WITH ArcView

These sites need to enter land units for a customer before a practice schedule may be developed. Land units may be entered by digitizing them in ArcView or by adding them on the Land Units tab in Outlook. Refer to the *Toolkit Extensions to ArcView User's Guide* for instructions on how to digitize land units and attribute them with the **Land Units tool**. Land units digitized in ArcView are listed on the Land Units tab in Outlook under the heading **Mapped**. Mapped land units may be viewed or selected from the Land Units tab, but they must be updated and deleted from ArcView.



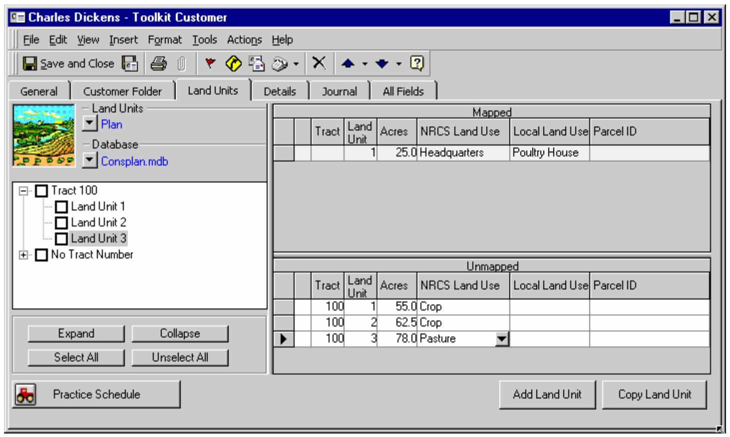
Land units added from the Land Units tab in Outlook remain **unmapped** until they are linked to corresponding digitized land units in ArcView. To add **unmapped land units** with the Land Units tab in Outlook, refer to Section *Add Land Units from Outlook*.

Sites WITH FOCS Data and WITH ArcView

These sites may use the Outlook Land Units tab to view land units for a customer that were transferred from FOCS. Land units transferred from FOCS are listed under the heading **Unmapped**, meaning that they have not been linked to a digitized land unit in ArcView. After they are linked, these land units appear under the heading **Mapped**. Mapped land units may be viewed or selected from the Land Units tab in Outlook, but changes must be made with the Land Units tool in ArcView. Refer to the user guide, *Toolkit Extensions to ArcView*, Chapter *Land Unit Tool*, for instructions on how to add or edit mapped land units in ArcView.

Sites with ArcView may also add land units from the Land Units tab in Outlook. However, these land units remain under the heading Unmapped, until they are linked to corresponding digitized land units in ArcView. Refer to the instructions below to add unmapped land units with the Land Units tab in Outlook.

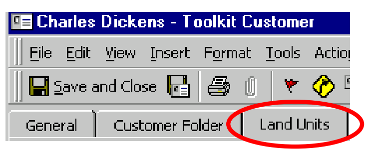
This view shows several unmapped land units, meaning that they have not been linked to digitized land units. The view also shows a mapped land unit, meaning that has been digitized.



Add or Edit Land Units in Outlook

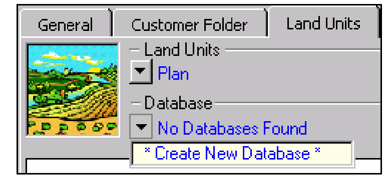
Step-by-Step Instructions

2. Start Outlook, and select the **Toolkit Customers** folder. Double-click on a customer contact to open it.
3. Click the **Land Units** tab on the customer's Outlook contact form.



The **Land Units tab** may not be available if **Company** name and **Company/Business ID** have not been entered for the customer. Enter **Company** on the **General** tab, then click the **Customer Folder** tab to enter **Company/Business ID**. The **Land Units** tab is created when you enter this data.

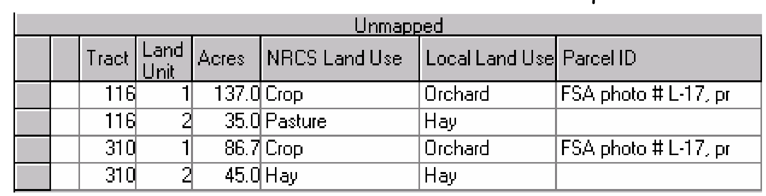
4. In the upper left corner of the tab under the **Land Units** heading, click the down arrow to select the type of land units you will add: Plan, Alternative, or Benchmark.



The most common selection is **Plan**. You are not required to enter benchmark or alternative land units.

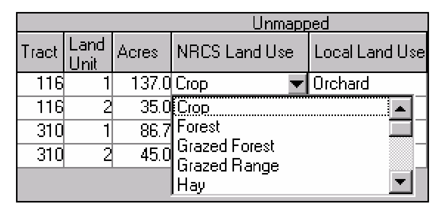
5. For **Database**, select **Create New Database**.
6. Accept the database name **Consplan** (an abbreviation for *conservation plan*), or type a name such as **RangePlan**.

7. Click the **Add Land Unit** button in the lower right corner to add a land unit. A blank row appears under the heading, **Unmapped**.
8. Click once in the cell below **Tract**, then type a tract number. **Tract** is not required. Click once in the **Land Unit** cell. Type a land unit number. Click once in the **Acres** cell. Type the acres of the land unit. Both **Land Unit** and **Acres** are required.



Unmapped						
	Tract	Land Unit	Acres	NRCS Land Use	Local Land Use	Parcel ID
	116	1	137.0	Crop	Orchard	FSA photo # L-17, pr
	116	2	35.0	Pasture	Hay	
	310	1	86.7	Crop	Orchard	FSA photo # L-17, pr
	310	2	45.0	Hay	Hay	

9. **NRCS Land Use** is optional. Click once in the cell, then click the button to view the choice list. Double-click to select an item.

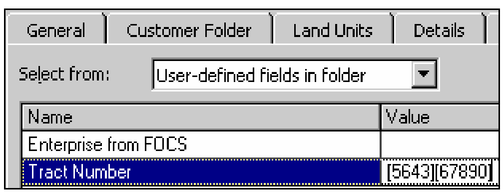


10. **Local Land Use** is optional. Click once in the cell, then click the button to view the choice list. Double-click to select an item.
11. **Parcel ID** is optional. Some sites use this field to enter other types of information such as township, section, and range.

12. Click the **Add Land Unit** button to add another land unit. To reduce typing, click the **Copy Land Unit** button. The information from the last row entered, except for land unit number, is copied to a new row. Type a land unit number, and change acres as needed.
13. Repeat steps 6-11 for each land unit.
14. To delete a land unit, click the gray button on the left side of a row to select it. An arrow appears, and the row is highlighted. Press **Delete** on the keyboard. If you delete a land unit, you will also delete the practices scheduled on the land unit.

Update Tract Numbers in Outlook

When a land unit with a tract number is added on the Outlook Land Units tab, the Tract Number list on the All Fields tab is not updated automatically. If you want to search for Toolkit Customers by tract number, click the **All Fields** tab. Click the button in the **Select From** box. Scroll past **User defined fields in this <u>item</u>** to **User defined fields in <u>folder</u>**.



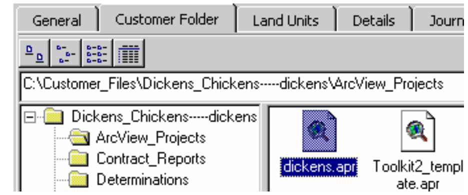
Type new tract numbers enclosed in brackets, as seen above. For more information about using tract number to locate a Toolkit customer, refer to the user guide, *Managing Customer Data*.

Add Land Units in ArcView

<u>Step-by-Step-Instructions</u>

1. Start Outlook, and select the **Toolkit Customers** folder. Double-click on a customer contact to open it.

2. Click the **Customer Folder** tab, and select **ArcView_Projects**. Double-click a project file to open ArcView.



3. Activate the Planned Land Units theme. Select the ArcView **Theme** menu, then select **Start Editing**. Digitize land unit(s) as needed. Select the ArcView **Theme** menu, then select **Stop Editing**, and save the changes.
4. Open the Toolkit toolbar, and click the **Land Units** tool.
5. Enter information on the *Land Units* dialog box. Click **Save** to save the changes. Refer to user guide, *Toolkit Extensions to ArcView*, Chapter *Land Unit Tool*, for instructions.

Edit Land Units in ArcView

<u>Step-by-Step-Instructions</u>

1. Click the **Customer Folder** tab, and select **ArcView_Projects**. Double-click a project file to open ArcView.
2. Activate the Planned Land Units theme, and click the ArcView **Select Features** tool . Select the land unit to edit.
3. Click the Toolkit toolbar , then click the Land Units tool .
4. Edit the information on the *Land Units* dialog box as needed. Click **Save** to save the changes. Refer to user guide, *Toolkit Extensions to ArcView*, Chapter *Land Unit Tool*, for instructions.

Delete Land Units in ArcView

<u>Step-by-Step-Instructions</u>

1. Click the **Customer Folder** tab, and select **ArcView_Projects**. Double-click a project file to open ArcView.
2. Activate the Planned Land Units theme. Select the ArcView **Theme** menu, then select **Start Editing**.
3. Click the ArcView **Select Features** tool . Select the land unit to be deleted. Press the **Delete** key on the keyboard.
4. Select the ArcView **Theme** menu, then select **Stop Editing**. Save the changes.

Schedule Practices

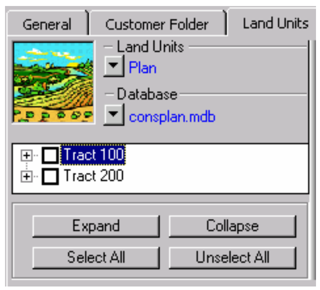
Conservation practices are scheduled with the Practice Schedule tool. This tool may be started from Outlook or from ArcView.

Start the Practice Schedule From Outlook

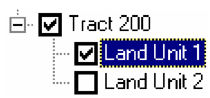
Step-by-Step Instructions

1. From the Land Units tab in Outlook, click the **Practice Schedule** button 

. The button is active if at least one land unit has been entered. Add a land unit to activate the button.
2. Land units may be selected before the Practice Schedule is started, or they may be selected from the Practice Schedule. To pre-select land units, view the list on the left side of the **Land Units** tab.



3. To display all the land units in a tract, click the plus box ⊞ next to a tract, or click the **Expand** button to display every land unit.
4. To hide the display of the land units in a tract, click the minus button ⊟, or click the **Collapse** button to hide every land unit.
5. Click the check box ☑ next to a land unit to select it. Click the check box ☑ next to a tract to select all the land units in the tract, or click the **Select All** button to select every land unit.



6. As land units are selected, an arrow appears next to the corresponding land unit on the right side of the dialog box.

	Tract	Land Unit	Acres	NRCS Land Use
>	200	1	45.5	Pasture
	200	2	55.6	Crop

7. To undo selections, click on a check box ☑ again, or click the **Unselect All** button to undo every selection.

8. Click the **Practice Schedule** button 

to start the Practice Schedule and add or update scheduled practices. If land units were selected on the **Land Units** tab, the *Practice Schedule* dialog box automatically displays the current scheduling information for the land units.

Start the Practice Schedule From ArcView

Sites with ArcView may start the Practice Schedule directly from ArcView when a land units theme is active.

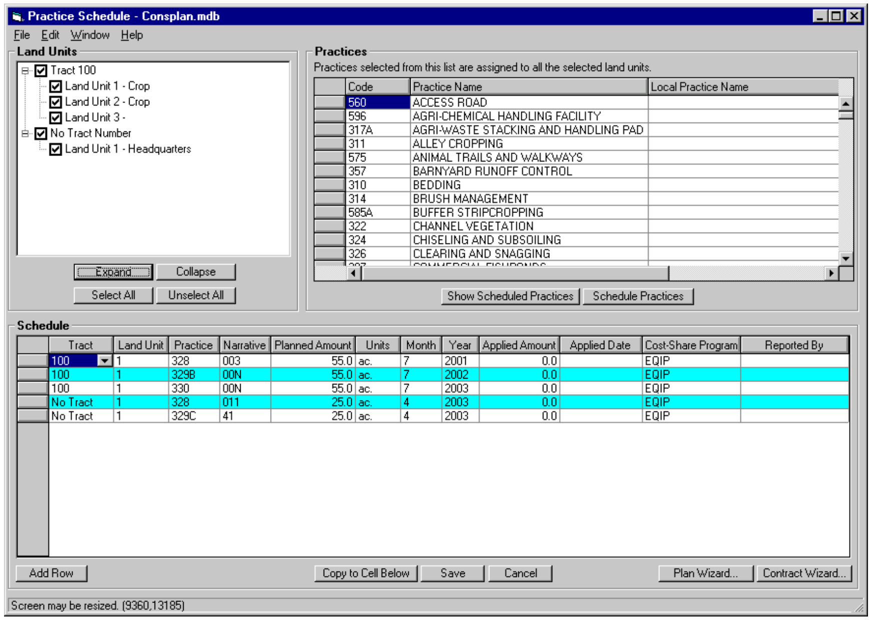
Step-by-Step Instructions

1. Make a land units theme active.

2. Land units may be selected before the Practice Schedule is started. To select one or more land units, click the ArcView Select Feature tool, then click on a land unit from the theme. To select additional land units, hold down **Shift** key and click on other land units. The selected land units and current scheduling information will be visible on the *Practice Schedule* dialog box.
3. Click the **Practice Schedule** button on the Toolkit toolbar to start the Practice Schedule.

Overview of the Practice Schedule Dialog Box

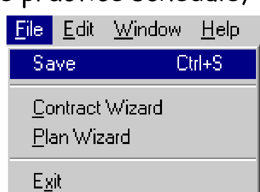
The *Practice Schedule* dialog box opens automatically at its maximum size. Monitor settings of either 1024 x 768 or 800 x 600 provide the optimal display. The monitor setting 640 x 480 is not recommended due to the extensive scrolling that is required to view all parts of the dialog box.



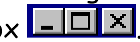
The Practice Schedule Dialog Box

The upper left corner of the dialog box displays the title **Practice Schedule** and the customer's database. Consplan.mdb is the open database in this example. 

Four menus are located in the upper left corner of the dialog box below the title. Select the **File** menu to **Save** the practice schedule, access the **Plan Wizard** and **Contract Wizard**, or **Exit**. Select the **Edit** menu to access **Copy**, **Paste**, and **Copy to Cell Below** functions. Select the **Window** menu to display local practice names in the Practices area.

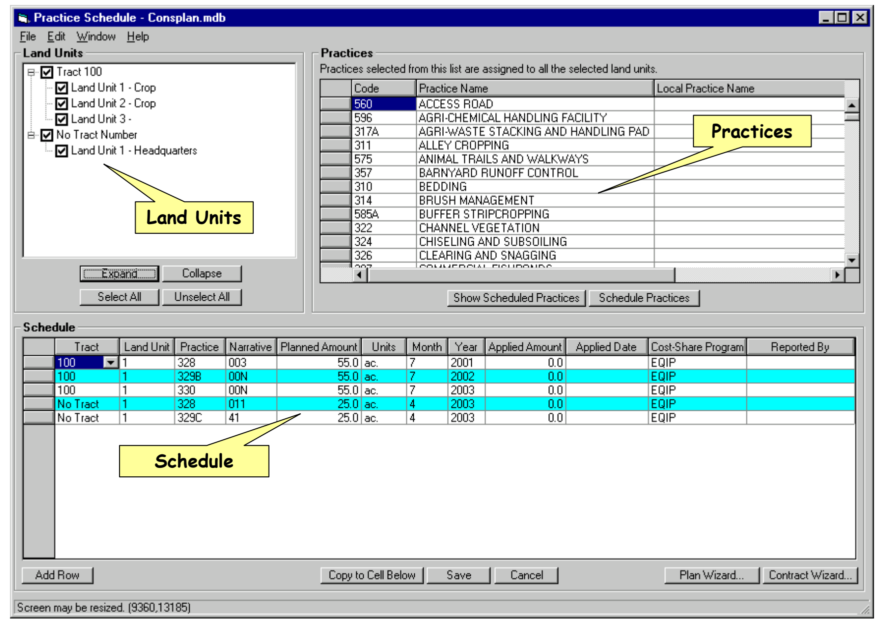


Select the **Help** menu to view **information About Practice Schedule.** Turn up the speaker volume to hear the tractor.

Minimize, open, or close the Practice Schedule by clicking the buttons in the upper right corner of the dialog box .

View status information in the lower left corner of the dialog box. Check this area for progress updates while records are retrieved, added, or saved. 

The interior of the dialog box is divided into three areas, **Land Units**, **Practices**, and **Schedule**. Each area is described on the following sections.



Practice Schedule dialog box

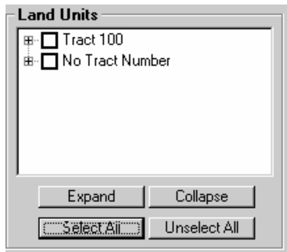
The Land Units Area

The Land Units area displays all the land units in the open database. Land units with tract numbers are listed below the heading "Tract <number>." Land units without tract numbers are listed below the heading "No Tract Number." NRCS land use (if it was entered), is displayed next to the land unit number.

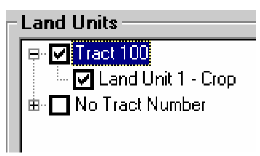
Land units may be selected or unselected from this area, but they may not be added, deleted, or edited. Add, delete, or edit land units only from the Outlook Land Units tab or from ArcView.

Select Land Units

Step-by-Step Instructions

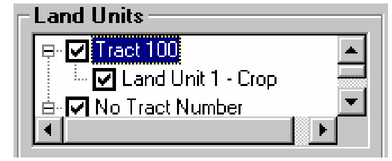


1. To view the land units under the headings "Tract <number>" or "No Tract Number", click the plus box ⊞ next to these items, or click the **Expand** button to view every land unit.
2. Click the check box ☑ next to a tract ☑ Tract 100 to select all the land units in the tract. Click the check box ☑ next to **No Tract Number** ☑ No Tract Number to select all the land units without tract numbers.
3. To hide the display of land units, click the minus box ⊟, or click the **Collapse** button.
4. Click the check box ☑ next to a land unit to select it. NRCS Land use is displayed if it was entered on the Outlook Land Units tab, or with the Land Units tool in ArcView.

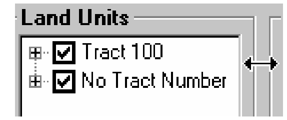


5. To select every land unit, click the **Select All** button.
6. To undo a selection, click on a check box ☑ again, or click the **Unselect All** button. As land units are selected, information for previously scheduled practices is displayed in the **Practices** area and in the **Schedule** area. As land units are unselected, this information is removed from the display.

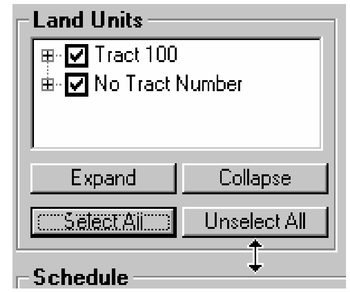
7. Scroll bars appear if the list of land units is too long or too wide for the box.



8. Change the width of the area by moving the cursor over the right border. Hold down the left mouse key to resize it.



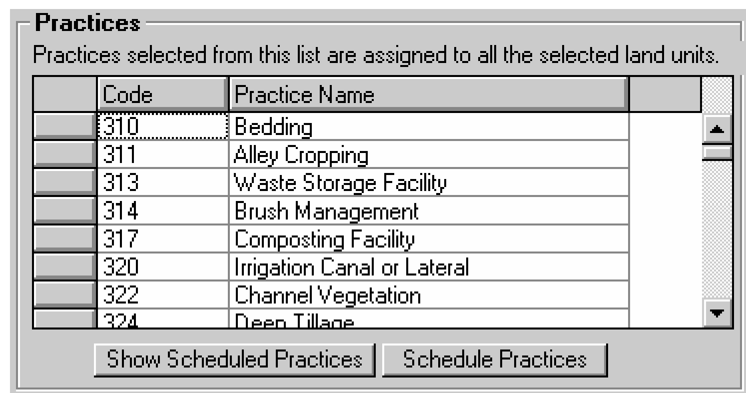
9. Change the length of the box by moving the cursor over the lower border. Hold down the left mouse key to resize it.



10. Move the cursor to the **Practices** area to continue.

The Practices Area

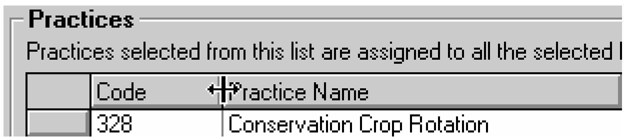
The Practices area lists the practices from the Standards and Specifications database that have been marked for display. When you select land units, previously scheduled practices are highlighted in the list.



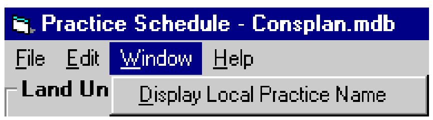
Select Practices

Step-by-Step Instructions

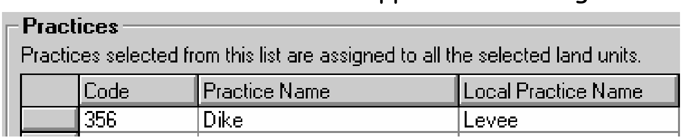
1. Click the column heading **Code** to sort the list by practice code.
2. Click the column heading **Practice Name** to sort the list by practice name.
3. To resize the columns, move the cursor between the Code and Practice columns until the cursor changes to ✛. Hold down the left mouse key and move the cursor right or left.



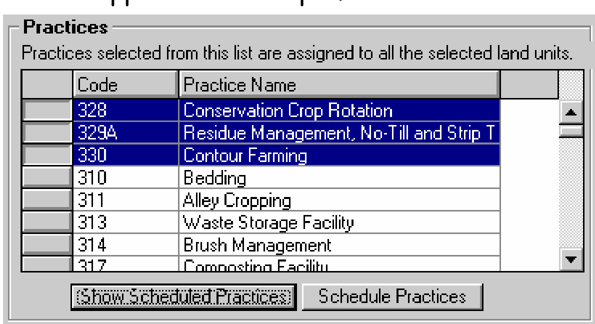
4. To display Local Practice Name, select the Window menu, and then select Display Local Practice Name.



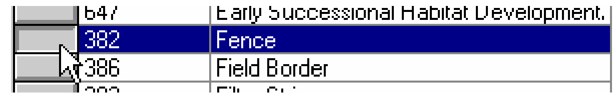
The Local Practice Name column appears on the right.



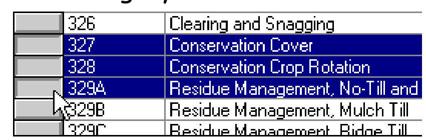
5. To view the practices that were scheduled previously on the select land units, click the **Show Scheduled Practices** button. The practices appear at the top of the window.



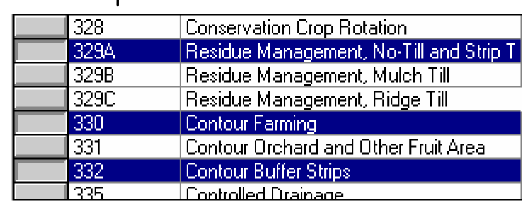
6. Choose a method to locate a practice in the list:
   - Click in a cell in the **Code** column, then type the first number of a practice code. For example, type 6 to move to practice code 600. Type 6 again to move to 601.
   - Click in a cell in the Practice Name column, then type the first letter of a practice name. For example, type F to move to Fence. Type F again to move to Field Border.
   - Move the scroll bar up or down the list until the practice appears in the list.
7. To select a practice, click the gray button on the left side of the practice code. A practice is not selected unless the entire row is highlighted.



8. To select practices that are next to each other, click the gray button next to the first practice, and then hold down the **Shift** key while you click the gray button next to the last practice.

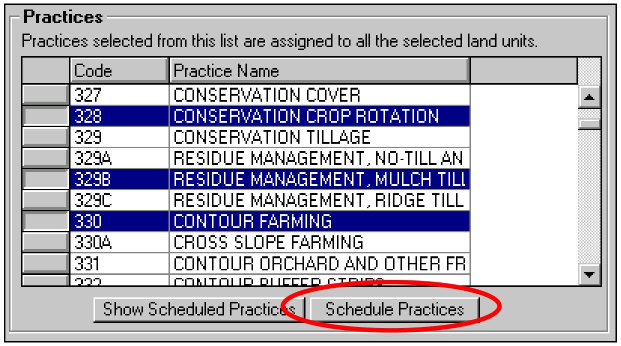


9. To select practices that are not next to each other, hold down the **Ctrl** key, and click the gray button next to a practice code. Click on additional practices as needed.



10. To undo a selection, hold down the **Ctrl** key and click the gray button next to a selected practice.

11. Click the **Schedule Practices** button to schedule the selected practices on each selected land unit.



This action adds a new row in the **Schedule** area for each selected practice and land unit. For example, if five land units were selected in the Land Units area, and three practices were selected in the Practices area, 15 new records are added to the Schedule area. This is a quick way to add practice information without a lot of data entry.

The **Schedule Practices** button will not add a new record if a practice is already scheduled on a land unit. However, you may add the same practice manually in the **Schedule** area as long as either the practice narrative or the planned month and year are not the same.

12. Move the cursor to the **Schedule** area to complete the practice schedule.

The next Section *The Schedule Area* provides instructions on how to use the **Schedule** grid. The section that follows it, *Complete Data Entry for Practices Added with the Schedule Practices Button*, provides instructions on how to complete the practice schedule.

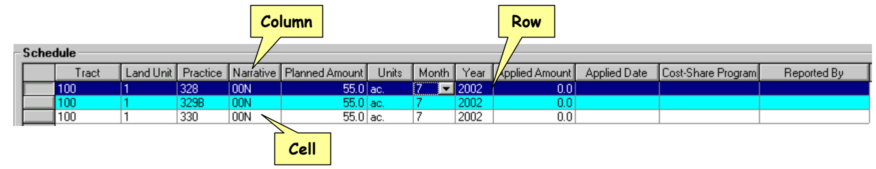
The Schedule Area

The Schedule area displays practices that are scheduled or applied on the selected land units. Practice schedule information may be added, deleted, and updated in this area. Information entered here is used in the conservation plan and contract support documents. It is also used in the Conservation Data Viewer to produce reports and maps of planned or applied practices.

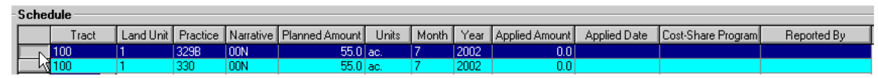
Schedule Grid Rows

Step-by-Step Instructions

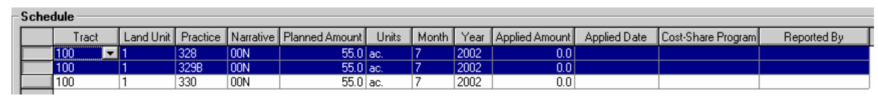
1. The Schedule area consists of **rows** and **columns** called a **grid**. A row in the grid corresponds to a practice schedule record in the customer's database. Alternate rows have a light blue background for easier viewing. Each row has twelve data fields called **cells**.



2. To select a row, click the gray button on the left side of the row, or press the **Down Arrow** key on the keyboard.



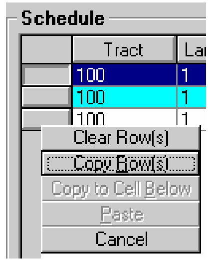
3. To select rows that are next to each other, hold down the **Shift** key, and click the gray button next to the first row, then click the gray button next to the last row.



4. To select rows that are not next to each other, hold down the **Ctrl** key, and click the gray button next to the first row, then click the gray button of additional rows as needed.

5. To unselect a row, click the gray button next to a different row, or click in any cell in the grid.

6. When a row is selected, it may be cleared. Move the mouse to the gray button on the left side of a row, then click the right mouse button to display a menu.

   Select **Clear Row(s)**. Do not use the **Copy Row(s)** option because it causes errors.

   Select **Cancel** to close the menu.

7. To delete a row, select it, then press the **Delete** key on the keyboard. To delete several rows, use the **Shift** or **Ctrl** keys to select the rows, then press the **Delete** key. Click **Save** to save the changes.

Schedule Grid Columns

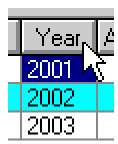
Step-by-Step Instructions

1. The Schedule grid has twelve columns. Data entry is **required** for Tract (select a tract number or "no tract number"), Land Unit, Practice, Narrative, Planned Amount, (Planned) Month, and (Planned) Year.

   Data entry is **optional** for Applied Amount, Applied Date, Cost-Share Program, and Reported By.

   The value for *Units* is entered automatically when a practice is selected. Units may not be changed from the Schedule grid.

2. To sort the data in a column, click a column header.

   When the **Land Units** header is clicked, land units are sorted by tract number first, then by land unit number. Land units with tract numbers are sorted ahead of those without a tract number.

   (Planned) **Month** is sorted by (Planned) **Year** first.

   (Planned) **Year** is sorted in ascending order.

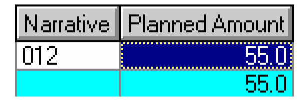
   Practice Narrative is sorted by practice code first, then by narrative ID.

Schedule Grid Cells

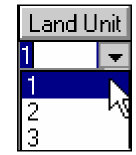
Step-by-Step Instructions

1. The data entry fields in the Schedule grid are called **cells**. Data may be entered, edited, or deleted when a cell is selected.

2. To **select** a cell, click once inside it. A selected cell has a yellow, dashed outline and a dark blue background.

   When selected, some cells display a button with an arrow . Click the arrow once to display a choice list. The choice list for (Planned) **Month** displays automatically. The choice list for **Reported By** is created after the first name is entered.

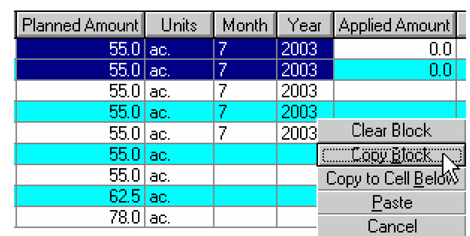
   When a **Narrative** cell is selected, this button appears. Click the button once to open the *Practice Narratives* dialog box. The section that follows provides instructions for this dialog box.

3. To **type data** in a cell, click once in the cell to select it. As you type, the cell background changes from dark blue to white, and the **Save** button is grayed. Press **Enter** to register the value and activate the **Save** button. Click **Save** to save the value in the database.

4. To **delete** data in a cell, click once in the cell to select it, then press **Delete** or **Backspace** on the keyboard.

5. To **copy** data from a cell to the cell directly below it, select the cell, then click the **Copy to Cell Below** button. Click the button again to paste the value in the next cell below.

6. To **copy data from several cells**, select the first cell, then hold down the left mouse key and drag the mouse across additional cells. Click the right mouse button and select **Copy Block**.

7. To **paste** data from several cells, select the first cell, then hold down the left mouse key and drag the mouse across additional cells. Click the right mouse button and select **Paste**.

Schedule Grid Buttons

Step-by-Step Instructions

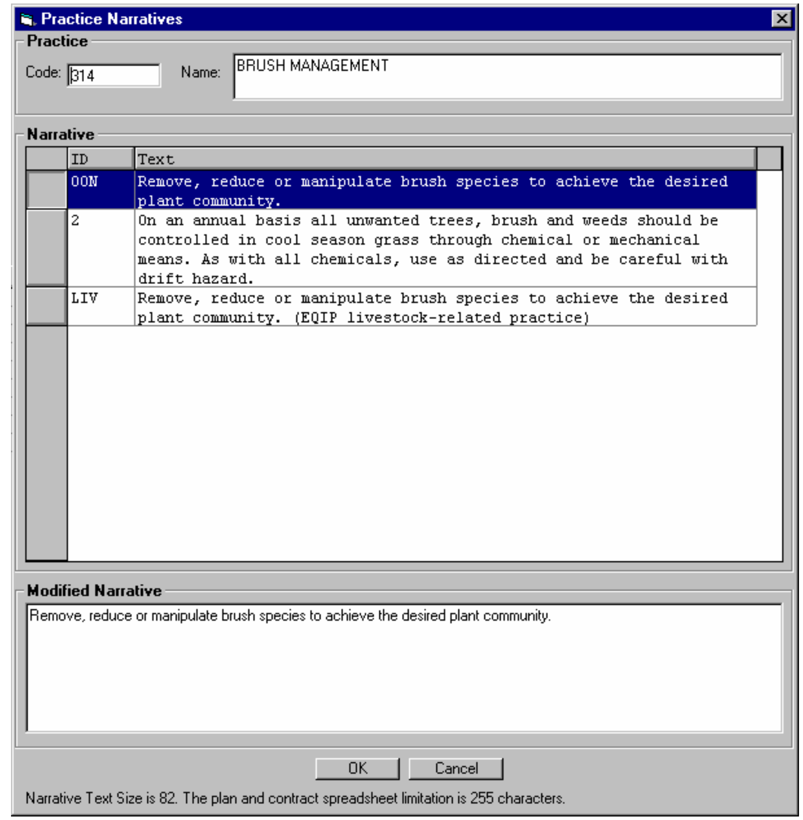
1. The **Add Row** button adds a new row to the Schedule grid. The button is always active.
2. The **Copy to Cell Below** button copies the data in the selected cell to the cell directly below it. The button is always active.
3. The **Save** button saves the data from the Schedule grid to the customer's database. The button is active unless a cell is being edited. Click the save button when you complete a row.
4. The **Cancel** button closes the dialog box. It is always active.
5. The **Plan Wizard** button starts the Plan Wizard. It is active when the data in the Schedule grid is saved.
6. The **Contract Wizard** button starts the Contract Wizard. It is active when the data in the Schedule grid is saved, and at least one practice has a cost-share program.

Complete Information for Practices Added with the Schedule Practices Button

Step-by-Step Instructions

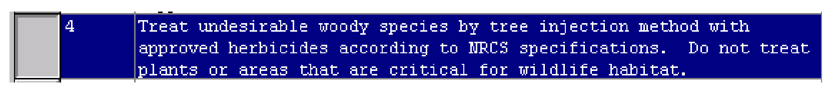
1. When records are added to the Schedule grid with the **Schedule Practices** button, several data entry fields are completed automatically: **Tract**, **Land Unit**, **Practice**, and **Units**. When practice units are acres, **Planned Amount** is set automatically to the acres of the land unit. Otherwise, a value must be entered when practice units are feet or number (NO.).
2. Click once in an empty **Narrative** cell to select it. Click the  button once to open the *Practice Narratives* dialog box. The narratives for the practice from the Standards and Specifications database (StandSpec.mdb) appear in the dialog box. Standard narratives may not be added, deleted, or edited from this dialog box. However, you may edit the narrative for this customer's plan in the **Modified Narrative** text box (see Step 4).

   If the list of narratives is longer than the display area, a scroll bar appears on the right. Move the scroll bar to view the full list.

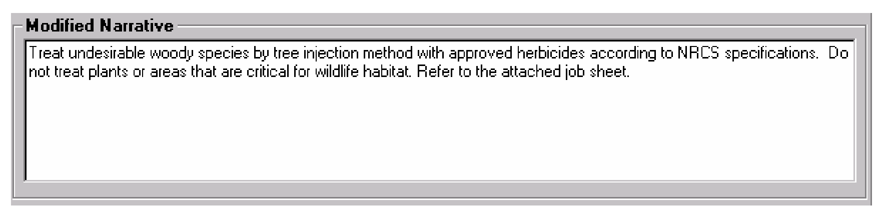


The Practice Narratives Dialog Box

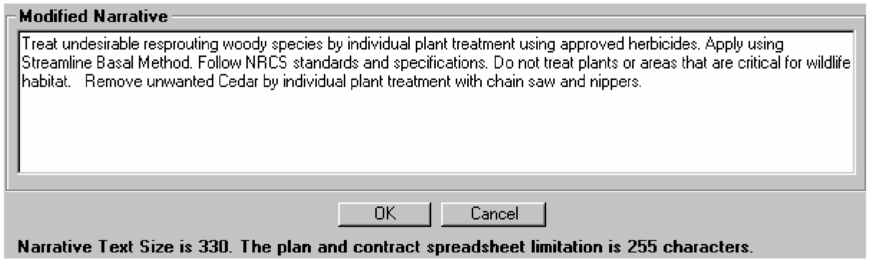
3. To select a narrative, click the gray box on the left side of the narrative ID.



4. The selected narrative appears in the Modified Narrative text box in the lower part of the dialog. You may add or change the text, and save it in the customer's database. Changes are not saved in the StandSpec.mdb file.



NOTE: If you type more than 255 characters, a message appears in bold at the bottom of the dialog. The example below shows that the narrative is 330 characters. The narrative will be truncated to 255



characters on both the plan and the contract support documents because Microsoft® Excel limits the number of text characters to 255 per cell.

5. Click **OK** to return to the schedule. The ID for the selected narrative appears in the cell.
6. If the practice units are acres, the land unit acres appear in the **Planned Amount** cell. Accept the value, or double-click in the cell to change it. Planned Amount for acres must be one-tenth acre (.1) or greater. If the practice units are numbers (NO.), or feet, double-click in the cell to enter a value. Planned Amount for numbers must be a whole number—decimals are ignored. Planned Amount for feet must be one-tenth foot (0.1) or greater. Press **Enter** to continue.
7. Click once in an empty (Planned) **Month** cell. Type a number between 1 and 12, or click the button to select **Month** from the list. Press **Enter** to continue.
8. Click once in an empty (Planned) **Year** cell. Valid years include 1975 through 2050. If you type a number between 0 and 50 and press **Enter**, year becomes 2000 to 2050 automatically. If you type a number between 75 and 99, year becomes 1975 to 1999 automatically. For example,

becomes


and


becomes


.

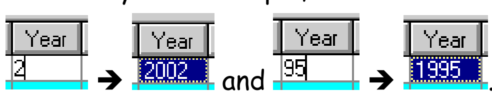
9. If the practice will be cost-shared, click once in an empty **Cost Share Program** cell. Click the button to select a cost-share program from the list. Click the button again to select additional cost-share programs, up to five cost-share programs for a practice. If the practice will be a non cost-shared item in a contract, select a cost-share program.
10. Click once in the **Reported By** cell. Enter the name or initials of the person who planned the practice. As names are entered, they are added to a choice list. If available, click the button to select a name from the list. The choice list is for the current customer's database only. There is no common list. You may want to establish an office standard so that everyone enters names the same way.
11. Click **Save** when you complete a row. Clicking **Save** before you complete the required cells in a row, causes reminder messages to be displayed.
12. Repeat steps 2-11 for each practice.
13. To continue, click the **Plan Wizard** button or the **Contract Wizard** button. To close the dialog box and return to the Outlook Land Units tab or to ArcView, click **Cancel** or ☒.

Complete Information for Practices Added with the Add Row Button

Step-by-Step Instructions

1. When the **Add Row** button is used to add records to the Schedule grid, each cell in the row is empty. Data must be entered for **Tract**, **Land Unit**, **Practice**, **Narrative**, **Planned Amount**, (Planned) **Month**, and (Planned) **Year**. Data entry is optional for Applied Amount, Applied Date, Cost-Share Program, Reported By.
2. Click once in the empty **Tract** cell. Click the button to view the tracts that were selected from the Land Unit area. If land units without tract numbers were selected, the entry "No Tract" appears in the list. Select a value.

3. Click once in the empty **Land Unit** cell. Type a land unit number or click the button to select one from the list. The list shows the selected land units from the Land Unit area.
4. Click once in the empty **Practice** cell. Type a practice code, or click the button to select one from the list. **Units** are entered automatically when a practice is selected. If the practice units are acres, **Planned Amount** is set to the acres of the land unit.
5. Click once in the empty **Narrative** cell. Click the button once to open the *Practice Narratives* dialog box. Select a narrative. Type additional text if needed and then click **OK** to return to the grid. Refer to the previous Section *Complete Information for Practices Added with the Schedule Practices Button*, Step 2 and 3 for more information about the *Practice Narratives* dialog box.
6. Click once in the **Planned Amount** cell. If practice units are acres, accept the value, or change it, then press **Enter**. Planned Amount for acres must be one-tenth acre (.1) or greater. If practice units are feet or numbers (NO.), type a value, then press **Enter**. Planned Amount for numbers must be a whole number—decimals are ignored. Planned Amount for feet must be one-tenth foot (0.1) or greater. Press **Enter** to continue.
7. Click once in an empty (Planned) **Month** cell. Type a number between 1 and 12, or click the button to select **Month** from the list. Press **Enter** to continue.
8. Click once in the (Planned) **Year** cell. Valid years include 1975 through 2050. If you type a number between 0 and 50 and press **Enter**, year becomes 2000 to 2050 automatically. If you type a number between 75 and 99 and press **Enter**, year becomes 1975 to 1999 automatically. For example,



9. If the practice will be cost-shared, click once in an empty **Cost Share Program** cell. Click the button to select a cost-share program from the list. Click the button again to select additional cost-share program, up to five cost-share programs for a practice. If the practice will be a non cost-shared item in a contract, select a cost-share program.

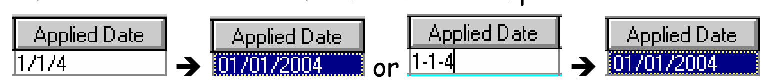
10. Click **Save** when you complete a row. Clicking **Save** before you complete the required cells in a row causes several reminder messages to be displayed.
11. Repeat steps 2-10 for each row you add.
12. To continue, click the **Plan Wizard** or **Contract Wizard** buttons.
13. To return to the Outlook Land Units tab or to ArcView, click **Cancel** or ☒.

Enter Applied Practice Information

Applied practice information may be entered in the Schedule grid. Entry of applied information is optional. However, if you want to produce reports and maps of applied practices with the Conservation Data Viewer, the customers' practice schedule should be updated with applied information when changes occur.

Step-by-Step Instructions

1. Double-click in an **Applied Amount** cell. If the practice units are acres, type a value one-tenth acre (0.1) or greater. If the practice units are numbers (NO.), type a value of 1 or greater. If the practice units are feet, type one-tenth foot (0.1) or greater. Press **Enter** to continue.
2. Click once in an **Applied Date** cell. Enter a date. If you enter a minimum number of characters, and press **Enter**, the date defaults to the correct format. For example:



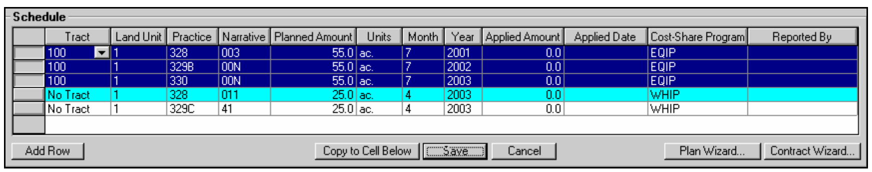
3. Click once in a **Reported By** cell. Enter or change the name or initials to indicate the person who reported or certified the practice. As names are entered, they are added to a choice list. If available, click the button to select a name from the list. The choice list is for the current customer's database only, there is no common list. You may want to establish an office standard so that everyone enters names the same way.

Start the Plan Wizard

1. The **Plan Wizard** button is active when the data in the Schedule grid is saved, otherwise it is grayed. Click **Save** to activate it.
2. Click the **Plan Wizard** button start the Plan Wizard. Every record displayed in the Schedule grid will appear in the plan. Select and unselect the land units in the Land Unit area to adjust the practices and land units you want in the plan.

Start the Contract Wizard

1. The **Contract Wizard** button is active when the data in the Schedule grid is saved, and at least one practice in the grid is cost-shared. Otherwise, the button is grayed. Click **Save** to save the data in the Schedule grid, or add **Cost-Share Program** to at least one practice to activate it.
2. To start the Contract Wizard for all the practices in the Schedule grid, click the **Contract Wizard** button.
3. To start the Wizard for a specific program, e.g. EQIP, click the **Cost-Share Program** header to sort the rows. Hold down the **Shift** key to select the EQIP practices and click the **Save** button, then click the **Contract Wizard** button.



Tract	Land Unit	Practice	Narrative	Planned Amount	Units	Month	Year	Applied Amount	Applied Date	Cost-Share Program	Reported By
100	1	328	003	55.0	ac.	7	2001	0.0		EQIP	
100	1	329B	00N	55.0	ac.	7	2002	0.0		EQIP	
100	1	330	00N	55.0	ac.	7	2003	0.0		EQIP	
No Tract	1	328	011	25.0	ac.	4	2003	0.0		WHIP	
No Tract	1	329C	41	25.0	ac.	4	2003	0.0		WHIP	

4. The Contract Wizard may take a few moments to open, depending on the number of practices in the Schedule grid.

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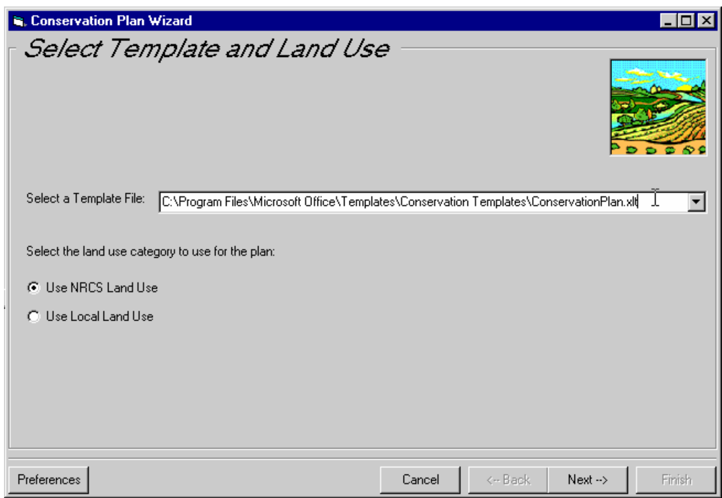
Develop a Plan with the Plan Wizard

The Plan Wizard guides you through the process of creating a plan document for the land units that were selected from the *Practice Schedule* dialog box. The steps include: 1) select a plan template, 2) select participants for signature blocks, and 3) select maps or photos. As the **Plan Wizard** closes, it starts Microsoft Excel automatically. The plan is customized, and printed from Excel.

Select Template and Land Use

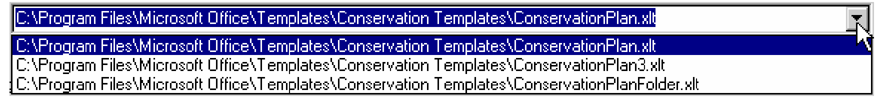
Step-by-Step Instructions

1. Click the **Plan Wizard** button on the *Practice Schedule* dialog box to start the Plan Wizard.
2. The Plan Wizard opens with the *Select Template and Land Use* dialog box. Click ☐ to maximize the dialog box to a full screen display. Click **Cancel** or ☒ to close it. Click **Preferences** to add or edit Service Center information for the heading of the plan document.



3. For **Select a Template File**, accept the template file or click the ▼ button to select one from the list. The list includes only the conservation plan templates that the Wizard finds in the Conservation Templates folder.

Develop a Plan with the Plan Wizard

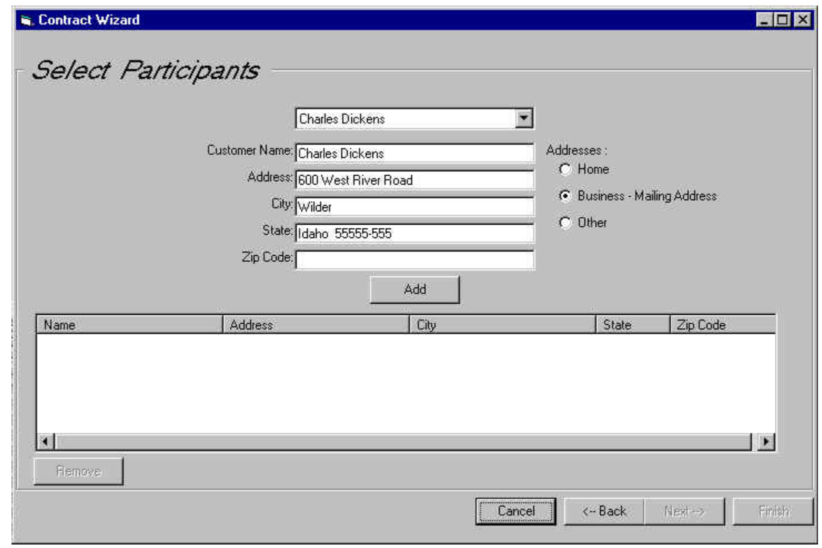


4. Select either the **Use NRCS Land Use** or **Use Local Land Use** option.
5. Click **Next** to continue.

Select Participants

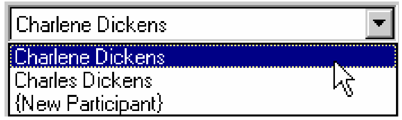
Step-by-Step Instructions

1. On the *Select Participants* dialog box, select the participants who will sign the plan. Click the **Add** button to add a name to the window below. The name and address of each participant you select appears on the first page of the plan, and a corresponding signature block appears on the last page.

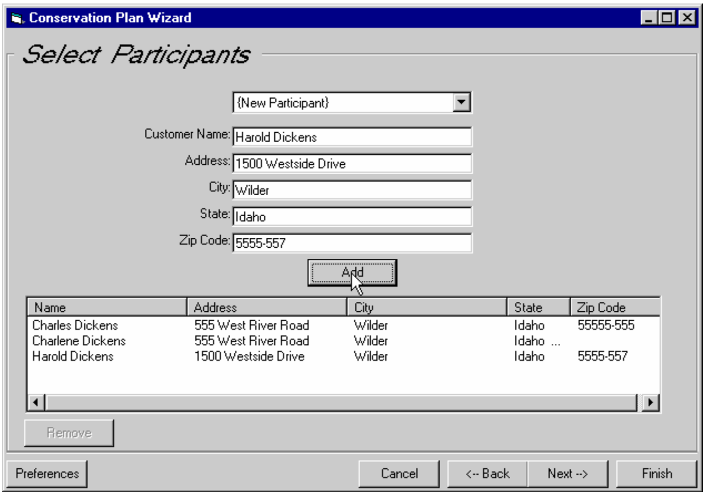


When the dialog box opens, the name and address of the first Outlook contact associated with the business appears. Under Addresses, the Wizard automatically shows the type of address displayed and if the address is also the mailing address. Click the button beside **Home**, **Business**, or **Other** to select another address for the participant. If you want this information to appear in the plan, click the **Add** button. Otherwise, click the ▼ button to view other contacts for the business.

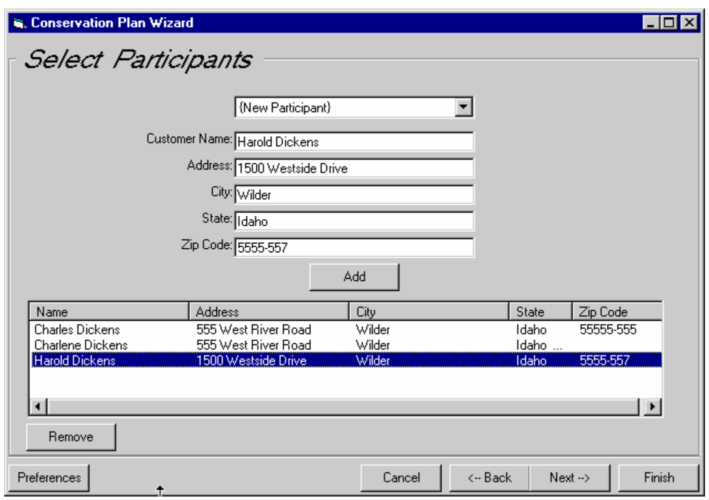
2. Select a name, then click the **Add** button.



3. Select **{New Participant}** if a signature block is needed for a participant who does not have an Outlook contact. Enter the new participant's name, then click the **Add** button. This process does not create an Outlook contact for the new participant.



4. To remove a participant, select the name from the list, then click the **Remove** button.

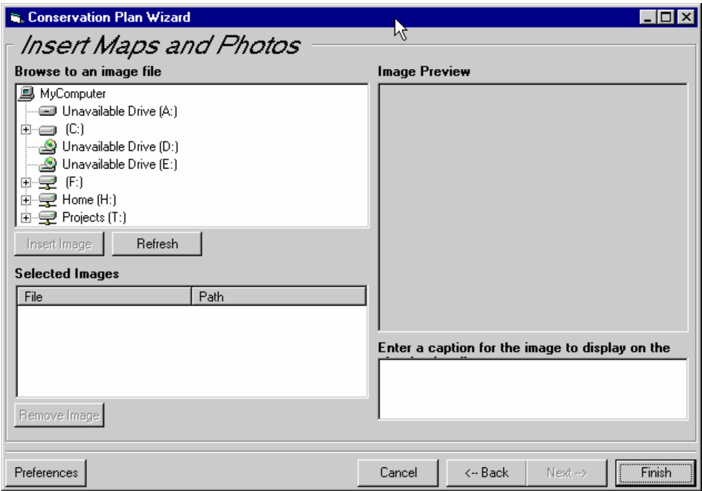


5. Click **Next** to add maps and photos to the plan document. Skip to the next section.

6. If you do want to insert maps or photos, see *Insert Maps and Photos* below. Otherwise click **Finish** to save the plan information, and then skip to Section *Save the Plan.*

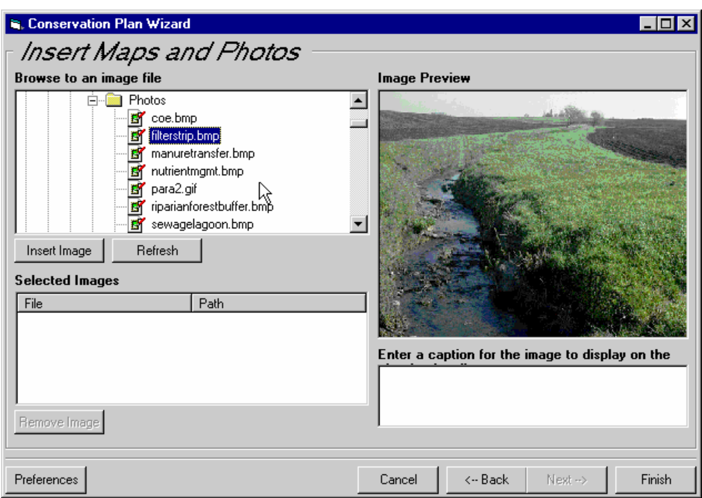
Insert Maps and Photos

The final Plan Wizard dialog box, *Insert Maps and Photos*, lets you select maps, digital photos, or other graphics to insert in the plan. The first image you select is inserted on the first page of the plan below the customer name and address block. If you select additional images, they are inserted below the first image.

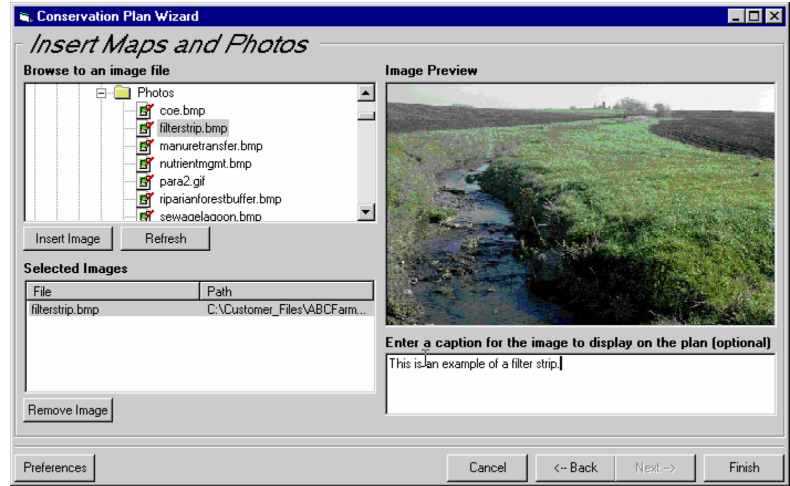


Step-by-Step Instructions

1. For **Browse to an image file**, browse through your folders to locate the map, photo, or graphic file in bmp, jpg or gif format. Select a file to view the image in the **Image Preview** window.



2. Click the **Insert Image** button to add the image to the **Selected Images** list.
3. (Optional) Type a caption in the window below the image. The caption appears on the plan above the image.



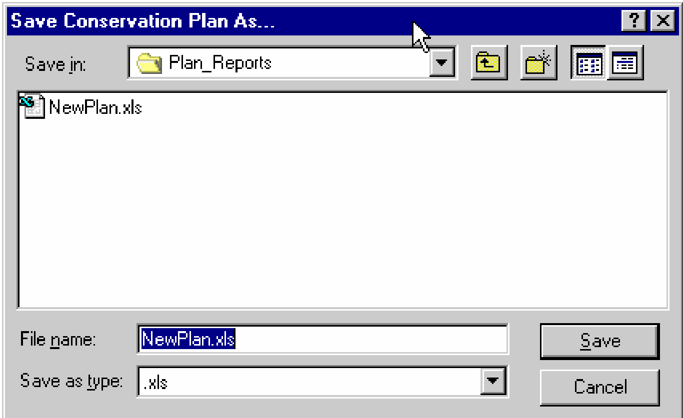
4. To remove an image, select the file in the **Selected Images** area, then click the **Remove Image** button.

5. Repeat steps 1-3 to insert additional images.
6. Click **Finish** to save the plan information.

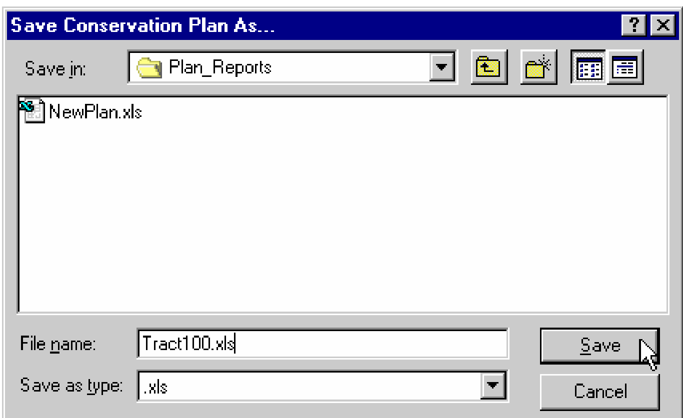
Save the Plan

Step-by-Step Instructions

1. On the *Save Conservation Plan As* dialog box, accept the default file name **NewPlan**, or…



enter a more appropriate name for the plan document, such as **Tract100.xls**, instead.



2. Click **Save** to save the file and start **Excel**.

Produce and Print a Conservation Plan

The Plan Wizard assembles the plan information into an Excel spreadsheet, saves it in the customer's **Plan_Reports** folder, and starts Excel. From Excel you may print the plan in the standard format or customize it. The standard format includes items:

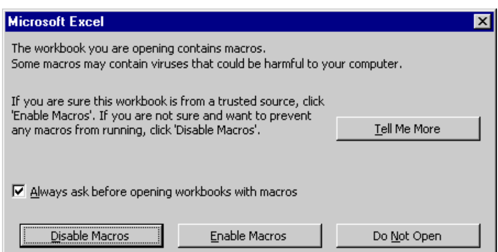
- Practices grouped by land use
- A practice narrative for each practice (the narrative is the one you selected and customized in the Practice Schedule)
- Columns for applied practice amounts
- Signature blocks for each participant

The section below shows how to produce and print a plan document in the standard format. If you prefer to customize the plan, skip to the next Section *Customize and Print a Conservation Plan*.

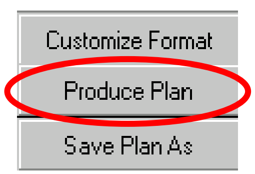
Produce and Print a Plan in the Standard Format

Step-by-Step Instructions

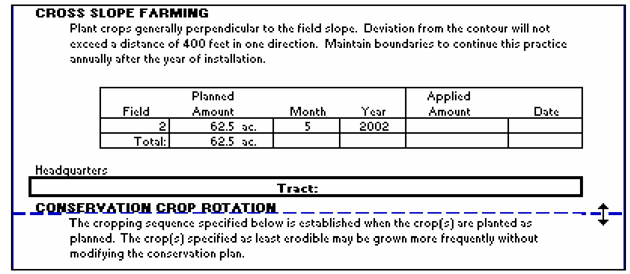
1. **Excel** starts automatically from the **Plan Wizard**. The Excel toolbar appears, and after a few moments, a message about macros is displayed. This is normal behavior, and is due to the Toolkit customizations. Click **Enable Macros** to continue.



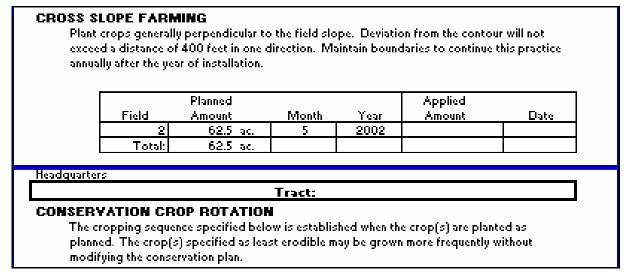
2. A spreadsheet opens with the file name you provided in the **Plan Wizard**. Three buttons appear at the top of the Plan worksheet. Click the **Produce Plan** button to load the plan information. This may take a few moments if the plan has many land uses, land units, and practices.



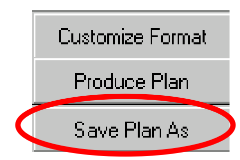
3. Select the Excel **File** menu, then select **Print Preview** to view the plan format. Click the **Close** button to return to the Plan worksheet.
4. Adjust page breaks as needed. Select the Excel **View** menu, then select **Page Break Preview**. This view displays page breaks set by the program as dashed blue lines. Use the mouse to click and drag page breaks to the desired location.



Page breaks that were moved appear as solid blue lines.



5. To print the plan, select the Excel **File** menu, then select **Print**, or click .
6. Click the **Save Plan As** button at the top of the Conservation Plan to save the file in the customer's folder. (The Excel **Save** feature may not save the file in the correct folder.)



7. Close **Excel**.

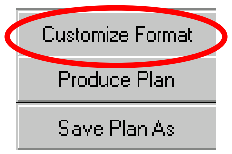
Produce and Print a Customized Plan

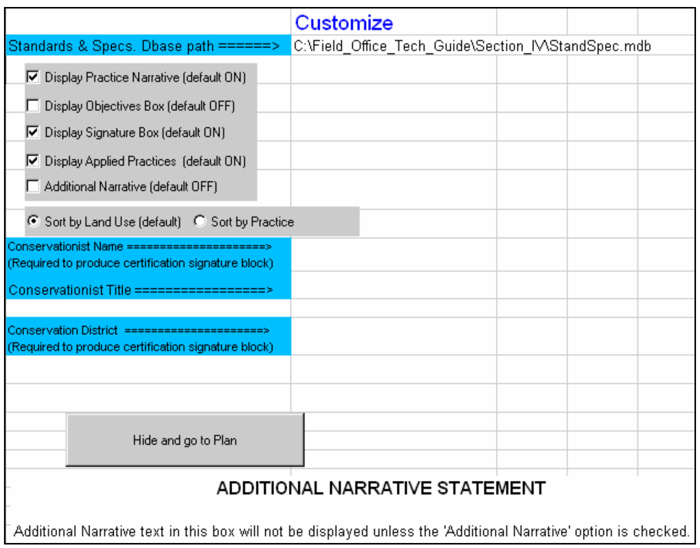
The appearance of a plan may be customized in several ways:

- Turn the display of practice narratives on or off.
- Display a block for the customer's objectives.
- Turn the display of signature blocks on or off.
- Turn the display of applied practice amounts and dates on or off.
- Display information by land use or by practice code.
- Display system narratives when land use is displayed.
- Display additional text when practice narratives are displayed.
- Insert maps or photos in other locations in the plan.

Step-by-Step Instructions

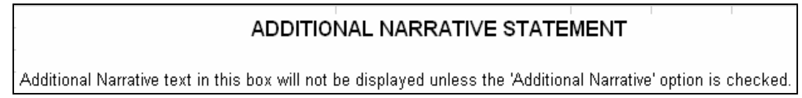
1. Click the **Customize Format** button at the top of the Plan worksheet to display the *Customize* worksheet with formatting options.



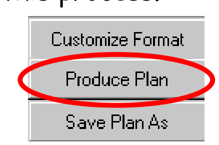


2. The first row displays the path and file name of the Standards and Specifications database. Do not change this information.
3. Click the check box ☑ to turn the display on or off for these items: practice narratives, a box for the customer's objective, participant signature blocks, applied practice amounts, and additional narrative (standard statements).

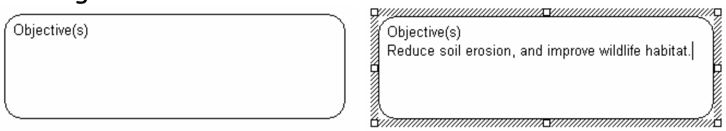
4. If the check box ☑ for **Additional Narrative** is checked, any standard statements that are typed in the **Additional Narrative Statement** box will appear on the plan signature page.



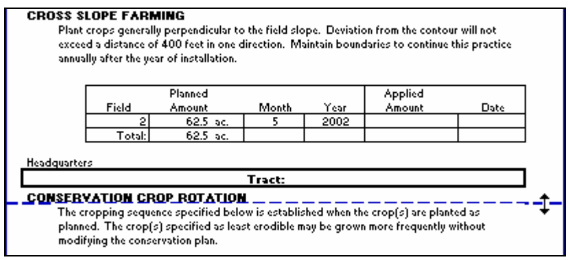
5. Select either the **Sort by Land Use** or the **Sort by Practice** option. *Sort by Land Use* groups information on the plan by land use, practice, tract, and land unit number. *Sort by Practice* groups information by practice, tract, and land unit number, and displays the practice code on the plan.
6. Click the cell to the right of **Conservationist Name**. Type the name of the person who will sign the plan. Click the cell to the right of **Conservationist Title**. Type the person's title.
7. Click the cell to the right of **Conservationist District** to add a signature block on the last page of the plan. Type the conservation district name.
8. Click inside an empty cell on the worksheet, then click the **Hide and go to Plan** button to return to the Plan worksheet.
9. If the option *Sort by Land Use* was selected, a system narrative may be included in the plan. Skip to the next Section *Add a System Narrative to the Plan*. A Helpful Hint on the Toolkit Web site also describes this process.
10. If the option *Display Practice Narratives* was selected, additional text may be added to the standard narrative. Skip to Section *Add Additional Text to Practice Narratives*. A Helpful Hint on the Toolkit Web site also describes this process.
11. Click the **Produce Plan** button at the top of the Plan worksheet to load the customized plan information.



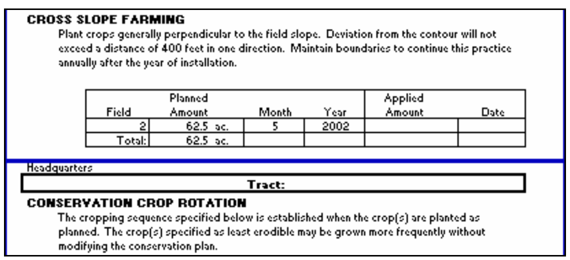
12. If the **Display Objectives Box** option was selected on the Customize worksheet, a box titled **Objective(s)** appears at the top of the plan. Click the box border to select it, then click once inside to display a cursor. Press **Enter** to start a new line, then type the objective. Do this last before printing the plan to avoid overwriting it if the **Produce Plan** button is clicked.



13. Adjust page breaks as needed. Select the Excel **View** menu, then select **Page Break Preview**. This view displays page breaks set by the program as dashed blue lines. Use the mouse to click and drag page breaks to the desired location.

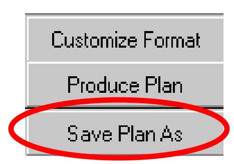


Page breaks that were moved appear as solid blue lines.



14. To print the plan, select the Excel **File** menu, then select **Print**, or click .

15. Click the **Save Plan As** button at the top of the Plan worksheet to save the file in the customer's folder. (The Excel **Save** feature may not save the file in the correct folder.)



Add a System Narrative to the Plan

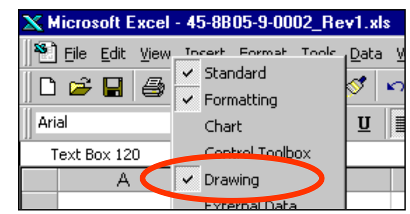
If the option *Sort by Land Use* was selected on the **Customize** worksheet, a system narrative may be included in the plan. Do not type system narratives directly on the Plan worksheet because they are overwritten each time the **Produce Plan** button is selected. Follow the steps below to ensure that this does not occur. (System narratives may be added to the plan template file instead. Refer to Section *Customize the Plan Template Files* for instructions on how to access the file, then follow the steps below.)

Step-by-Step Instructions

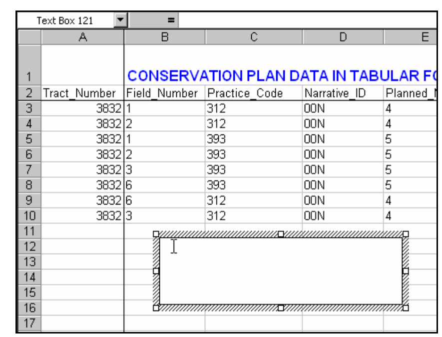
1. Click the **PlanData** worksheet tab at the bottom of the Excel window. 

2. Locate the **Drawing** toolbar in the Excel window.

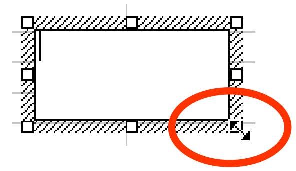
If you cannot find it, move the cursor over any Excel toolbar, and click the right mouse button. Click the check box next to **Drawing** to display the toolbar. Drag it to the location of your choice.



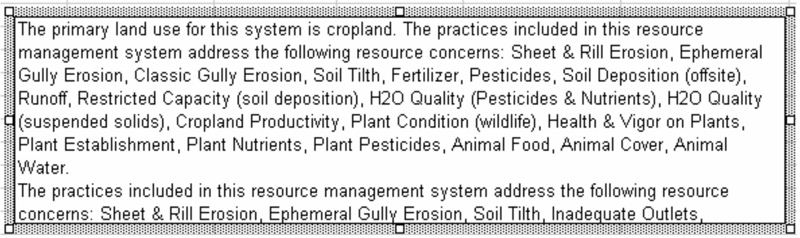
3. Click the **Text Box** tool  on the Drawing toolbar. Hold down the left mouse key and drag a box over a blank area anywhere on the PlanData worksheet. Release the left mouse key when the box is the size you want. A cursor blinks in left corner.



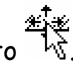
To increase the size of a text box, move the cursor over a corner of the box until the double-arrow cursor appears. Hold down the left mouse key and drag the corner to the desired size.



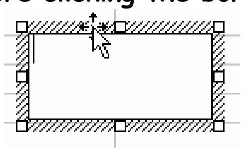
4. Type the system narrative in the box.

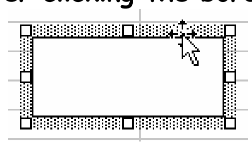


The primary land use for this system is cropland. The practices included in this resource management system address the following resource concerns: Sheet & Rill Erosion, Ephemeral Gully Erosion, Classic Gully Erosion, Soil Tilth, Fertilizer, Pesticides, Soil Deposition (offsite), Runoff, Restricted Capacity (soil deposition), H2O Quality (Pesticides & Nutrients), H2O Quality (suspended solids), Cropland Productivity, Plant Condition (wildlife), Health & Vigor on Plants, Plant Establishment, Plant Nutrients, Plant Pesticides, Animal Food, Animal Cover, Animal Water.
The practices included in this resource management system address the following resource concerns: Sheet & Rill Erosion, Ephemeral Gully Erosion, Soil Tilth, Inadequate Outlets,

5. When you finish typing the system narrative, move the cursor over the border of the box until the cursor changes to . Click the left mouse key to select the text box.

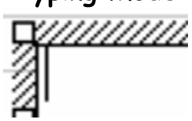
Before clicking the border. **After clicking the border.**

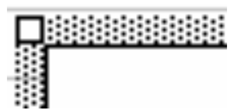




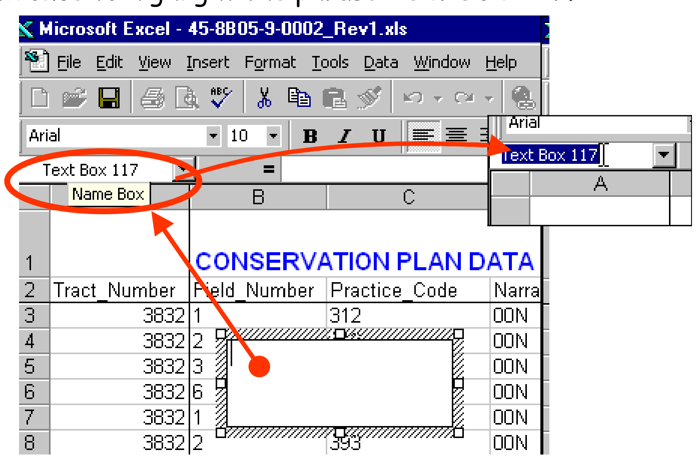
When you type in a text box, the border pattern is a diagonal line. When you select a text box, the border changes to dots.

Typing Mode **Selected Mode**

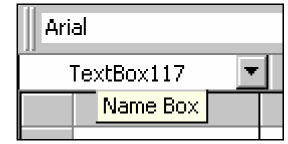




6. When the text box is selected, note the text box number in the Excel Name Box area, e.g. 117. Place the cursor in the area and click once to highlight the phrase **Text Box 117**.



Press the **Delete** or **Backspace** key to remove the value, **Text Box 117**. Retype it without the spaces, **TextBox117**. Press **Enter** to add the value to the Name Box.



7. Scroll the PlanData worksheet to the left to display Column J, System_Narrative_ID. Enter the text box number, e.g. 117, adjacent to the land use values in Column K, Client_Land_Use.

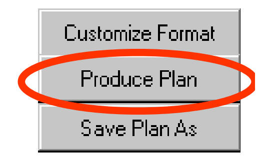
J	K
System_Narrative_ID	Client_Land_Use
117	Crop
	Pasture
	Grazed Range

8. Repeat steps 3-7 for the other conservation systems in the plan.

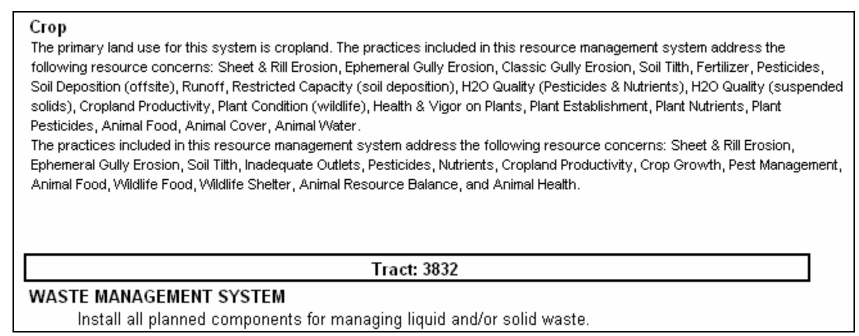
J	K
System_Narrative_ID	Client_Land_Use
117	Crop
118	Pasture
119	Grazed Range

9. Click the **Plan** worksheet tab at the bottom of the Excel window.

10. Click the **Produce Plan** button at the top of the Plan worksheet to view the system narratives.



11. System narratives appear below land use.



Crop

The primary land use for this system is cropland. The practices included in this resource management system address the following resource concerns: Sheet & Rill Erosion, Ephemeral Gully Erosion, Classic Gully Erosion, Soil Tilth, Fertilizer, Pesticides, Soil Deposition (offsite), Runoff, Restricted Capacity (soil deposition), H2O Quality (Pesticides & Nutrients), H2O Quality (suspended solids), Cropland Productivity, Plant Condition (wildlife), Health & Vigor on Plants, Plant Establishment, Plant Nutrients, Plant Pesticides, Animal Food, Animal Cover, Animal Water.
The practices included in this resource management system address the following resource concerns: Sheet & Rill Erosion, Ephemeral Gully Erosion, Soil Tilth, Inadequate Outlets, Pesticides, Nutrients, Cropland Productivity, Crop Growth, Pest Management, Animal Food, Wildlife Food, Wildlife Shelter, Animal Resource Balance, and Animal Health.

Tract: 3832

WASTE MANAGEMENT SYSTEM

Install all planned components for managing liquid and/or solid waste.

Add Additional Text to Practice Narratives

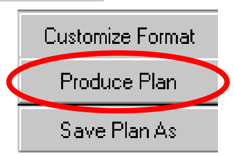
Plans produced with Toolkit display the practice narrative that you selected and customized in the Practice Schedule. This section shows how to make further customizations to the narrative if needed. If you type additional practice narrative on the Plan worksheet it is overwritten each time the **Produce Plan** button is selected. Follow these steps to ensure that it doesn't happen.

Step-by-Step Instructions

1. Click the **PlanData** worksheet tab at the bottom of the Excel window: 

2. Scroll the PlanData worksheet to the right to display Column L, Narrative_Text. The narrative that was selected from the Practice Schedule appears in this column.
3. You may type additional text but the total number of characters you type should not exceed 255. Any characters over 255 will be truncated on the plan.
4. When you finish typing the additional narrative, click the **Plan** worksheet tab at the bottom of the Excel window.

5. Click the **Produce Plan** button at the top of the Plan worksheet to view the practice narrative.



NOTE: Text that you add on the **PlanData** worksheet is not saved in the customer's database.

Customize the Plan Template Files

If you find that you customize the conservation plan in the same way for every customer, you may want to customize the conservation plan template file instead. Typical customizations include:

- Entry of the conservationist's name and title.
- Display of applied practice information turned off.
- Selection of *Sort by Land Use* or *Sort by Practice* options.

The Hints and Tips page on the Toolkit Web site describes how to add a worksheet to the template for standard system narratives.

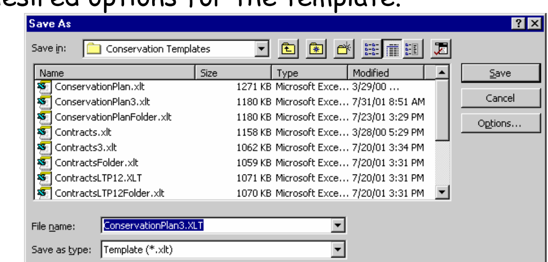
Produce and Print a Conservation Plan

Toolkit 3.1 updates two updated conservation plan templates: *ConservationPlan.xlt* and *ConservationPlanFolder.xlt*. (The "folder" template has space in the top margin to punch holes.)

Toolkit 3.1 also provides two new conservation plan templates: *ContractAD_1155.xlt* and *ContractAD_1156*.

Step-by-Step Instructions

1. Set the folder permissions for the template folders using the procedure in *Appendix: Setting Permissions to Modify Plan Templates* on page A-1.
2. Browse to this folder on the **Toolkit Central** computer:
   C:\Program Files\Microsoft Office\Templates
   USDA Workgroup Templates
3. Right-click on **ConservationPlan3.xlt**.
4. Select **Copy** from the pop-up menu.
5. Right-click on a blank area of the file display and select **Paste** from the pop-up menu. This pastes a backup copy of ConservationPlan3.xlt into the USDA Workgroup Templates folder.
6. Double-click on **ConservationPlan3.xlt** to open the file in Excel. An Excel message warns that the document contains macros.
7. Click the **Enable Macros** button to continue.
8. Use Excel to set the desired options for the template.
9. To save your changes, select the Excel **File** menu, and then select **Save As**.
10. Enter the file name under which you want to save the template.



11. Make sure that the **Save as type:** option is **Template (*.xlt)**.
12. Click the **Save** button. (Do not save the template by clicking the **Save Plan As** button. This saves the file in the .xls spreadsheet format instead of .xlt template file format.)
13. Repeat steps 6-12 of this procedure for each template you want to customize.
14. Copy the customized templates from Toolkit Central any other workstations in the office that need them.

Revise a Conservation Plan

Toolkit provides two options for revising conservation plans. Choose the option that works best for your situation.

Option 1: Make changes to the plan in Excel, then save the file to a new name such as **ConservationPlanRev1.xls**. Detailed instructions for this option are provided in the section below. Use this option when only minor changes are needed.

Option 2: Make changes to the land unit and practice data, then develop another plan with the **Plan Wizard**. The new plan may be saved with a file name such as **ConservationPlanRev1.xls**. This option takes longer, but ensures that the customer's practice schedule reflects the plan document. Follow instructions from previous chapters *Schedule Practices, Develop a Plan with the Plan Wizard,* and *Produce and Print a Conservation Plan* for this option.

Revise the Plan in Excel

Step-by-Step Instructions

1. Start Outlook and click on the **Toolkit Customers** folder to display the list of contacts. Double-click on the customer's contact to open it.
2. Click the **Customer Folder** tab on the Outlook contact form. Select the **Plan_Reports** folder. Double-click on a plan to open it in Excel.
3. Click a worksheet tab at the bottom of the Excel window to open a worksheet with plan information.

   Click the **PlanData** tab to change plan data:

   Click the **Customers** tab to change participant information:

   The **Maps** worksheet inserts or removes maps or photos:

4. On the **PlanData** worksheet, edit data from the practice schedule. Edits are saved in the spreadsheet, not in the customer's database.
5. On the **Customers** worksheet, edit customer name and address information. Edits are not saved in Outlook.

   Line 2 - Shows column headings and should **not** be changed.

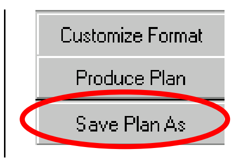
   Line 3 - Shows the primary customer name and address. Edit this information as needed.

   Line 4 – Shows names and addresses for additional participants. Edit the information or add a participant.

   The list is terminated by the first blank line.

	CUSTOMER DATA IN TABULAR FORM			
Customer_Name	Customer_Address	City	State	Zip
Charlene Dickens	555 West River Road	Wilder	Idaho	55555-555

6. Instead of editing the **Maps** worksheet, add maps or photos by selecting the Excel **Insert** menu, then select **Picture**.
7. Click the **Plan** worksheet tab at the bottom of the Excel window.
8. Click the **Produce Plan** button at the top of the Plan worksheet.
9. To print the plan, select the Excel **File** menu, then select **Print**, or click .
10. To save the revised plan in the customer's folder, click the **Save Plan As** button at the top of the Plan worksheet.



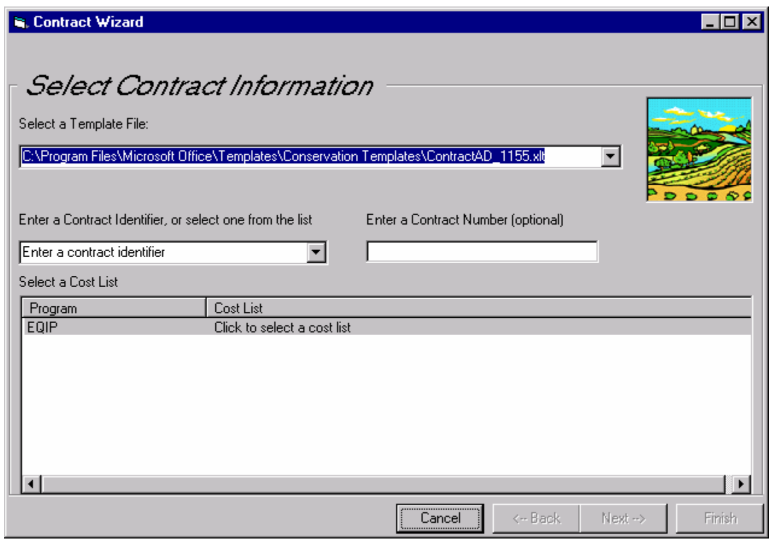
11. On the *Save As* dialog box, replace the current file name with one that indicates the revision, then click **Save**.
12. Close Excel.

Develop a Contract with the Contract Wizard

The Contract Wizard guides you through the process of creating either a contract support document AD-1155e, or a contract revision document, AD-1156e. The steps include: 1) selecting a contract template and cost list, 2) develop or revise contract items, and 3) select participants for signature blocks. When the **Contract Wizard** closes, it starts Microsoft Excel automatically. Contract documents are formatted, customized, and printed from Excel.

Select a Template and Cost List

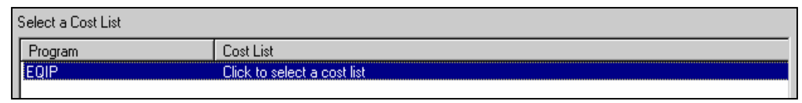
1. Click the **Contract Wizard** button on the *Practice Schedule* dialog box to start the Contract Wizard.
2. The Contract Wizard opens with the *Select Contract Information* dialog box. The dialog box displays at maximum screen size. Click to resize it. Click **Cancel** or to close it.



3. For **Select a Template File**, accept the default template file, ContractAD_1155.xlt, or click the button to select another.

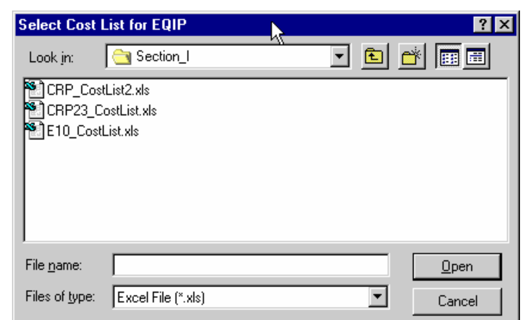
NOTE: Do not select Contract3.xlt or a derivative of that template because the LTP templates will not operate correctly with the Toolkit Contract Wizard.

4. Type **Contract Identifier** or click the button to select one from the list. A contract identifier uniquely identifies the customer's contracts in their database. An ID is used since a contract number may not be available when the contract is developed. Enter alpha-numeric characters, e.g. EQIP2001 or WHIP1. Spaces and characters like \, /, ", ', ; are not allowed. Each new contract for a customer must have an identifier. When revisions are needed, select the identifier from the list to retrieve the contract data from the customer's database (refer to Chapter *Revise a Contract*).
5. If a contract number has been assigned, click once in the field below **Enter a Contract Number**, and type it.
6. For **Select a Cost List**, click once on a program to open the *Select Cost List for <Program>* dialog box.



7. Select a cost list file, then click **Open**.

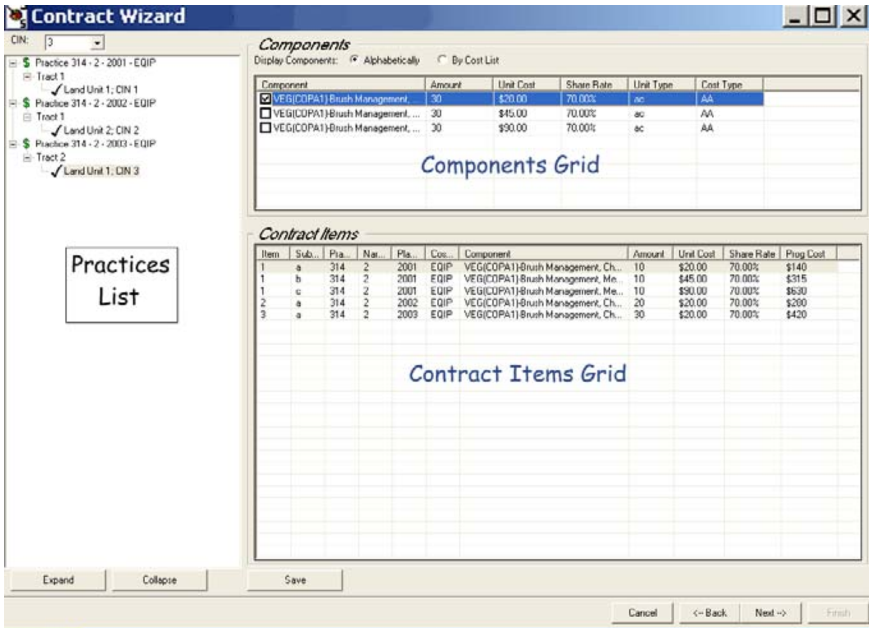
   Since the Contract Wizard does not save the name of the cost list file you select, you may want to record the cost list file name in an assistance note or other type of note for later reference if contract revisions are needed.



8. Repeat step 6 and 7 if other programs are in the list.
9. Click the **Next** button to display the *Contract Items* dialog box

Develop Contract Items

Contract items are defined on the contract item dialog box. This dialog has four areas, the **CIN** selection list on the upper left, the **Practices List**, the **Components Grid**, and the **Contract Items Grid**.



The current contract item number (CIN) appears in the list in the upper left corner of the dialog.

Develop a Contract with the Contract Wizard

The Practice List

The Practice list shows cost-shared practices from the Practice Schedule. Practice Code, Narrative ID, Planned Year, and Program are displayed:

$ Practice 314 - 00N - 2004 - EQIP

The land units for which the practice is scheduled are displayed below each practice. Two buttons appear below the Practice list. Click the **Expand** button to expand the list of practices and the land units where the practices are scheduled. Click the **Collapse** button to close the list.

$ Practice 314 - 00N - 2004 - EQIP
Tract 1829
Land Unit 1
Land Unit 2
Land Unit 3
Land Unit 4
Land Unit 5

The Components and Cost Item Grids

The **Components grid** displays the components from the cost list for a selected practice. Components are listed in alphabetical order. Select the **By Cost List** option to list components as they appear in the cost list. Move the cursor between the column headers to adjust the width of the columns. The **Amount**, **Unit Cost**, and **Share Rate** values may be changed, but the changes apply only to this contract.

Components

Display Components: ◉ Alphabetically ○ By Cost List

Component	Amount	Unit Cost	Share Rate	Unit Type	Cost Type
☐ 382-Fence, Permanent (interior only)	2,300	$0.50	75.00%	Lin.Ft	AM

As you select components, contract items appear automatically in the **Contract Items** grid.

Contract Items

Item	Sub...	Pra...	Nar...	Pla...	Cos...	Component	Amount	Unit Cost	Share Rate	Prog Cost
1	a	314	2	2001	EQIP	VEG(COPA1)-Brush Management, Ch...	10	$20.00	70.00%	$140
1	b	314	2	2001	EQIP	VEG(COPA1)-Brush Management, Me...	10	$45.00	70.00%	$315
1	c	314	2	2001	EQIP	VEG(COPA1)-Brush Management, Me...	10	$90.00	70.00%	$630
2	a	314	2	2002	EQIP	VEG(COPA1)-Brush Management, Ch...	20	$20.00	70.00%	$280
3	a	314	2	2003	EQIP	VEG(COPA1)-Brush Management, Ch...	30	$20.00	70.00%	$420

The Contract Items grid also displays **Prog Cost** (Program Cost), which is the product of the **Amount** times the **Unit Cost** times the **Share Rate**.

About Updating the Program Cost

- The **Prog Cost** updates automatically when you change the **Amount** in the Component grid or Contract Items grid.
- You can change the **Unit Cost** and **Share Rate** in the Component grid only.
- If you change the **Unit Cost** and **Share Rate**, the **Prog Cost** will not automatically update until you double-click on the Amount and press **Enter**.

Add Cost-Shared Items to a Contract

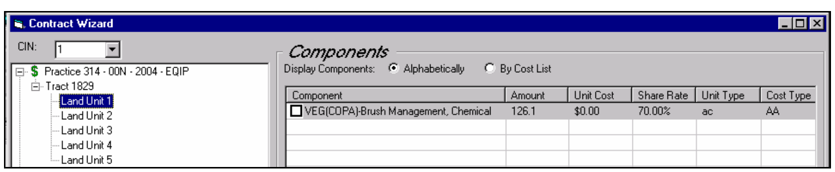
This version of the Contract Wizard provides greater flexibility to develop contract items than previous versions. However, you cannot develop separate contract items for multiple occurrences of the same practice that are scheduled in the same month and year on the same land unit.

Add the First Cost-Shared Contract Item

Step-by-Step Instructions

1. Click the **Expand** button to display the land units for each practice in the Practice list.
2. Note that the CIN in the upper left part of the dialog automatically displays **1**.

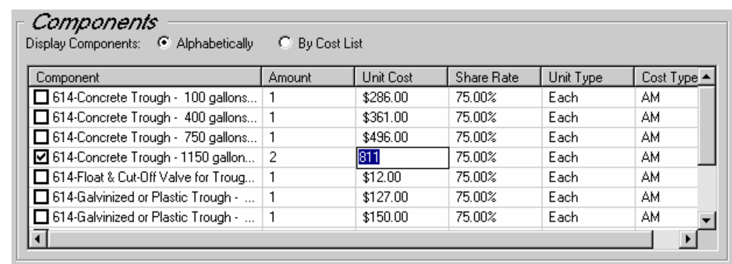
3. Click on the practice in the Practice list that you want to be the first contract item.
4. Click on a land unit below the practice. When you select a land unit, the practice component(s) appear in the **Components** grid.



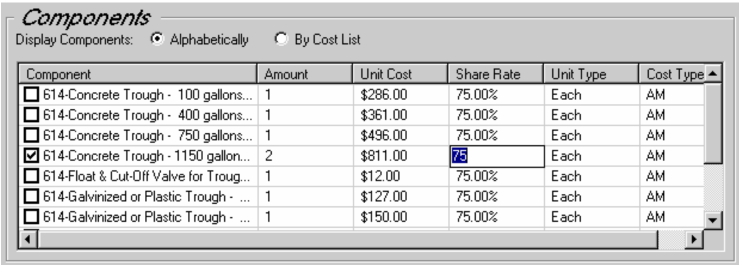
5. When the component units match the units of the selected practice, the planned amount of the practice appears in the **Amount** cell. Otherwise, the value in the cell is 0.0. To change **Amount**, double-click in the cell, then type the new value and press **Enter**.
   This table shows allowable "matches" for practice units and component units.

	Practice Units		
Component Units	**Acres**	**Feet**	**Number**
	AC.	FT.	NO.
	AC	FT	NO
	ACRE	Feet	NUMBER
	ACRES	Foot	EA.
		LIN.FT.	EACH
		LIN.FT	EA
		LN.FT.	
		LN.FT	
		L.F.	
		LF	

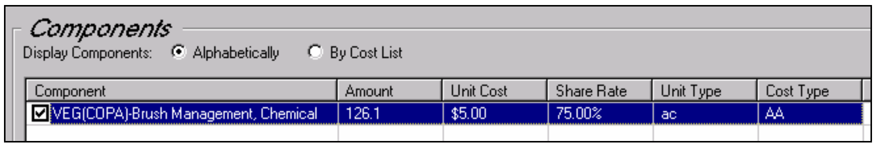
6. Accept **Unit Cost** from the cost list, or double-click in the cell to change it. Type the unit cost, and press **Enter**. Unit cost is changed for all occurrences of this component in this contract. It is not changed in the cost list.



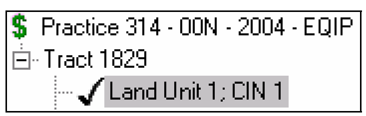
7. Accept **Share Rate** from the cost list, or double-click in the cell to change it. Type a cost share rate, and press **Enter.** Cost share rate is changed for all occurrences of this component in this contract. Cost share rate is not changed in the cost list. Do not type percentage values as decimals, e.g. .50. The Contract Wizard interprets decimal percentage values as 0.5%. Type 50 instead. Values like 50.5 are interpreted as 50.5%.



8. Click the check box next to a component to select it.

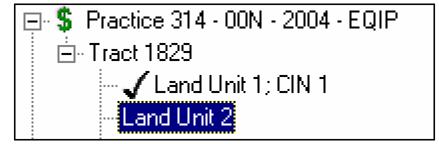


9. When you select a component, the contract item automatically displays in the **Contract Items** grid. The first item is labeled **1a** but the item number and letter may be changed later. Any changes you made to **Amount**, **Unit Cost** or **Share Rate** also appear in the Contract Item grid.
10. When you select a component, a checkmark appears in the Practices list on the left side of the land unit you selected. The contract item number appears on the right side of the land unit. In this case **CIN 1**.



11. If you select another component in the **Components** grid, a new line appears in the **Contract Item** grid. The second component is numbered 1b; the third is numbered 1c and so on.

12. To include another land unit in CIN 1, select it from the Practices list.



13. Select one or more components from the **Components** grid for the second land. If you select the same component that you selected for the first land unit, the planned amount for the second land unit is added to the planned amount for the first land unit. The total appears in the **Amount** cell in the **Contract Item** grid for CIN 1a.
14. If you select a new component, another item, 1b, is appears in the Contract Item grid automatically. You can change contract item numbers and sub item letters by double-clicking the **Item** and **Subitem** cells in the **Contract Item** grid. Accept the **Item** number in the **Contract Items** grid, or double-click in the cell to change it. Type a number between 1 and 99, and press **Enter**. The items are reordered

Accept the order of the components or double-click in the **Sub Item** cell to change it. Type letters between a and zz, then press **Enter**. The items are reordered.

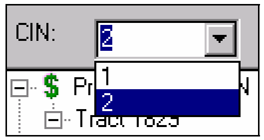
15. Click the **Save** button to save the first contract item in the customer's database.

Add the Second Cost-Shared Contract Item

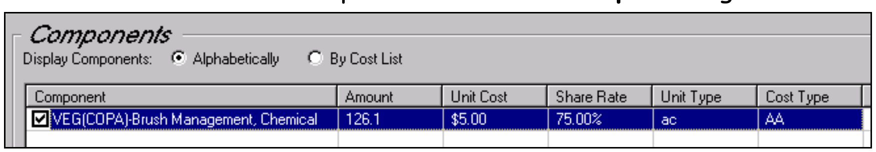
When you click on another practice in the Practices list, the contract item number automatically advances the next number. However, you can override this feature by selecting a CIN from the CIN list in the upper left corner of the dialog. The steps below show you how.

Step-by-Step Instructions

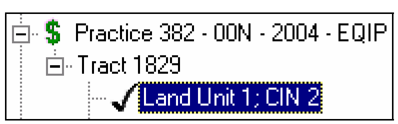
1. Click the **Expand** button to display the land units for each practice in the Practice list.
2. Click the button for the CIN list in the upper left part of the dialog. The list displays the current contract item number and the next contract item number. To develop the second contract item, select **2** from the list.



3. You can select another land unit from the currently selected practice, or you can select another practice from the Practice list.
4. When a land unit is selected, the component(s) for the selected practice appear in the **Components** grid. Click the check box to select one or more components from the **Components** grid.



5. Select one or more components from the **Components** grid for the second contract item. The first component you select appears in the **Contract Item** grid as 2a. A new line is added for each additional component you select. They are numbered 2b, 2c, and so on.
6. When you select a component, a checkmark appears in the Practices list on the left side of the land unit you selected. The contract item number appears on the right side of the land unit. In this case **CIN 2**.



Develop a Contract with the Contract Wizard

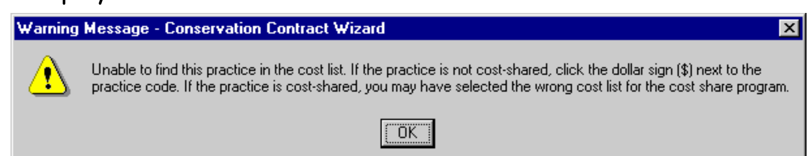
7. To include another land unit in CIN 2, select it from the Practices list.
8. Click the **Save** button to save the contract item in the customer's database.
9. Repeat steps 1-8 for additional cost-shared contract items.
10. If the contract has non cost-shared practices, follow the steps in the next Section *Add Non Cost-Shared Items to a Contract*.
11. If the contract does not have non cost-shared practices, click the **Next** button to continue developing the contract support document. Click **Cancel** or the button to close the Contract Wizard and complete the contract at a later time.

Add Non Cost-Shared Contract Items to a Contract

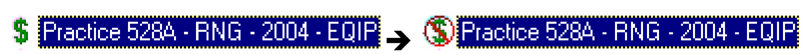
Step-by-Step Instructions

1. Click the **Expand** button to display the land units for each practice in the Practice list.
2. Accept the contract item number displayed in the CIN list or click the button to select the next number.
3. Click on a non cost-shared practice in the list to select it.

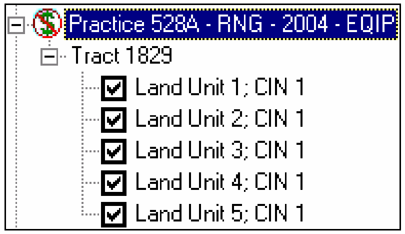
NOTE: Some cost lists do not include non cost-shared practices. When a practice is not found in the cost list, this message is displayed:



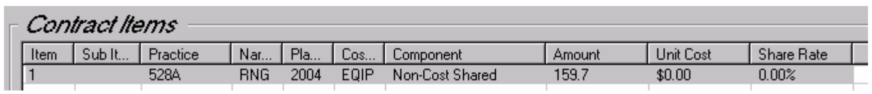
4. Click once on the dollar sign next to a practice to mark it as "non cost-shared".



The land unit(s) where the practice is scheduled is selected automatically.



The **Contract Item** grid shows the contract item and the **Amount** cell shows the sum of the planned amounts for the land unit(s). This value may be changed if needed. Double-click in the cell and type the new value, then press **Enter**.


Contract Items

Item	Sub It...	Practice	Nar...	Pla...	Cos...	Component	Amount	Unit Cost	Share Rate
1		528A	RNG	2004	EQIP	Non-Cost Shared	159.7	$0.00	0.00%

5. Click the **Save** button to save the contract items in the customer's database.
6. Repeat steps 1-5 for each non cost-shared item.
7. Click **Next** to continue. Click **Cancel** or the button to close the Contract Wizard and complete the contract at a later time.

Delete a Contract Item or Component

In the process of developing a contact, you may need to delete a contract item. The steps below show you how.

Step-by-Step Instructions

1. In the **Contract Items** grid, select the item you want to delete, then press **Delete** on the keyboard.
2. Renumber the contract items.

Reorder Contract Items or Components

In the process of developing a contact, you may want to reorder the contract items or reorder the components for an item. The steps below show you how.

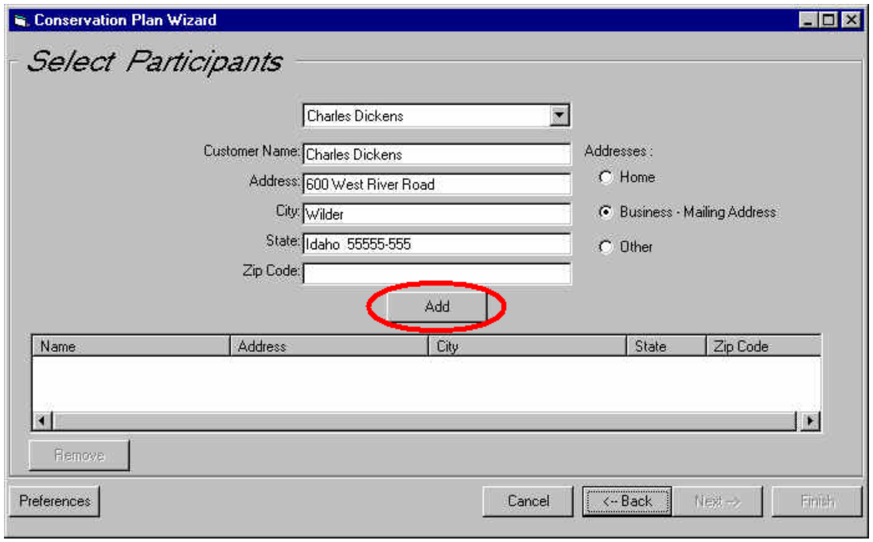
Step-by-Step Instructions

1. To reorder contact items, double-click the **Item** cell in the **Contract Item** grid. Type a new number and press **Enter**. The Contract Wizard does not allow items to have duplicate numbers. To achieve the ordering you want, you may need to change a CIN to a temporary number, then change the numbers to the correct sequence.
2. To reorder components for a contract item, double-click the **Sub Item** cell in the **Contract Item** grid. Type a new letter and press **Enter**. The Contract Wizard does not allow components to have duplicate letters. To achieve the ordering you want, you may need to enter a temporary letter, then change the letters to the correct sequence.

Select Participants

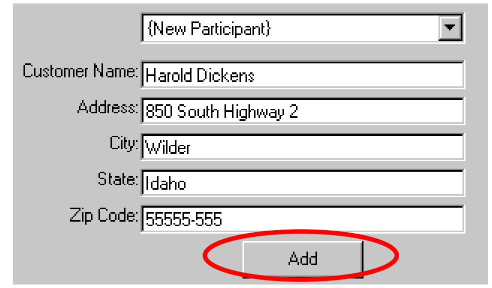
Step-by-Step Instructions

1. On the *Select Participants* dialog box, select the participants who will sign the contract. Click the **Add** button to add a name to the window below. The name and address of each participant you select appears on the first page of the contract, and a corresponding signature block appears on the last page.

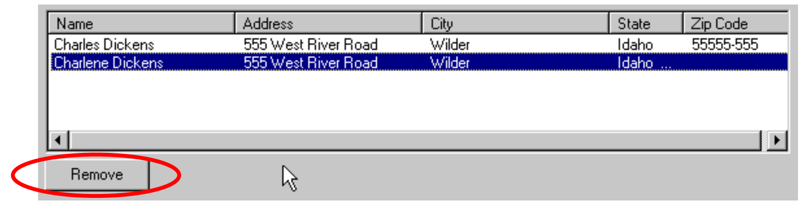


When the dialog box opens, the name and address of the first Outlook contact associated with the business appears. Click the button beside **Home**, **Business**, or **Other** to select the type of address. If you want this information to appear on the contract, click the **Add** button. Otherwise, click ▼ to view other contacts associated with the business. Select a name, then click the **Add** button.

2. Select **{New Participant}** if a signature block is needed for a participant who does not have an Outlook contact. Enter the new participant's name, then click the **Add** button. This process does not create an Outlook contact for the new participant.



3. To remove a participant, select the name from the list, then click the **Remove** button.

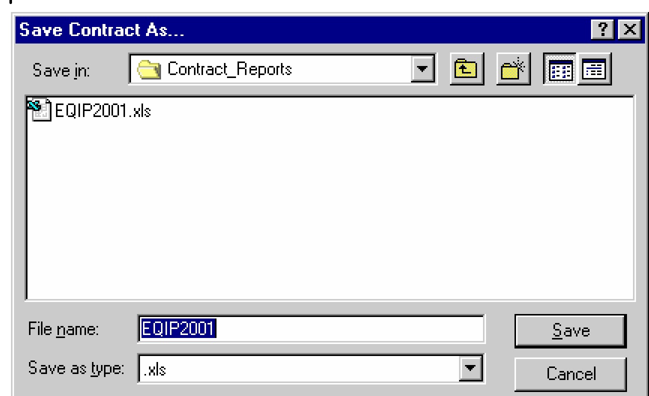


4. Click **Finish** to save the contract information. Skip to Section *Save the Contract.*

Save the Contract Support Document

Step-by-Step Instructions

1. On the *Save Contract As* dialog box, the contract file name is defaulted to <contract identifier>.xls. Accept the default name or type another name.



2. Click **Save** to save the file and start **Excel**.

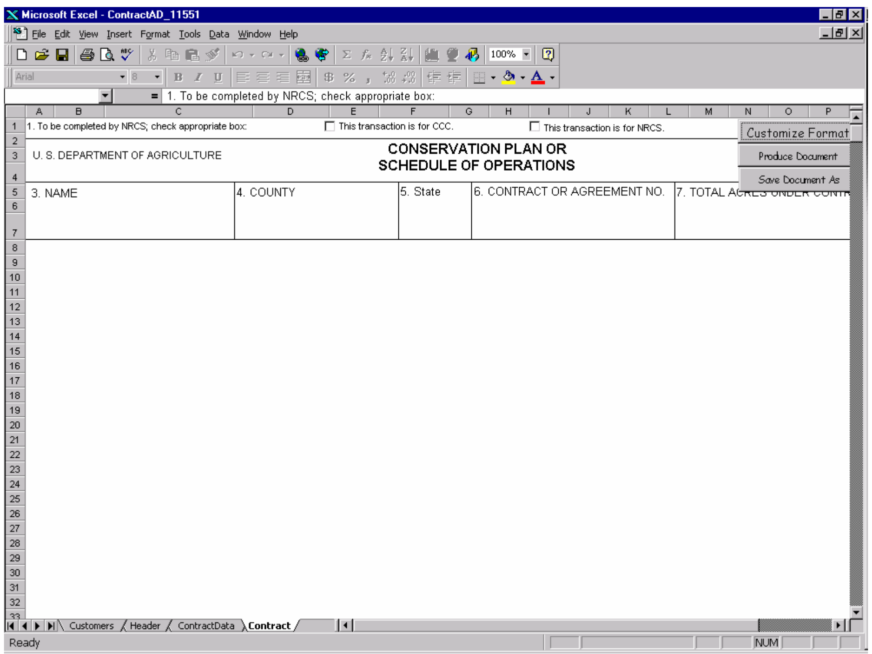
Produce and Print a Contract

The Contract Wizard assembles the contract information into an Excel spreadsheet, saves it in the customer's **Contract_Reports** folder, and starts Excel. Customize and print the contract AD-1155e form from Excel. Because the AD-1155e is a departmental form, only three customizations are allowed:

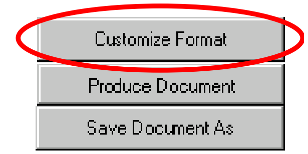
1. Display practice narratives that were selected and customized in the Practice Schedule.
2. Add signature blocks for sponsoring agencies.
3. Enter a recurring schedule.

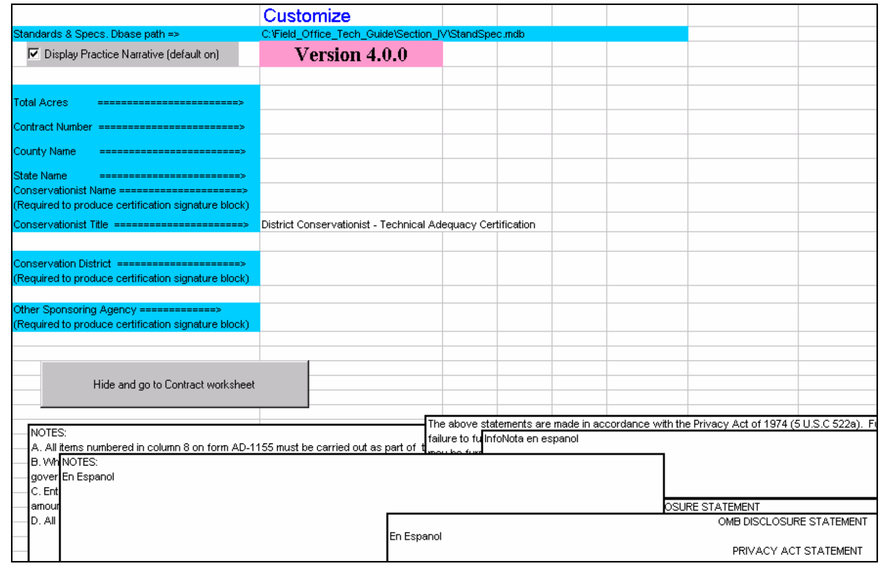
Step-by-Step Instructions

1. Excel starts automatically from the **Contract Wizard**. The Excel toolbar appears, and after a few moments, a message about macros is displayed. This is normal behavior and is due to the Toolkit customizations. Click the **Enable Macros** button.
2. A spreadsheet opens that looks like this:

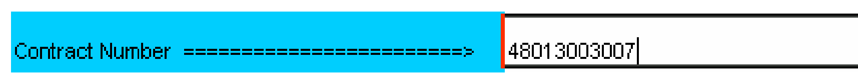


3. Three buttons appear at the top of the contract. Click the **Customize Format** button to display a worksheet with the formatting options.



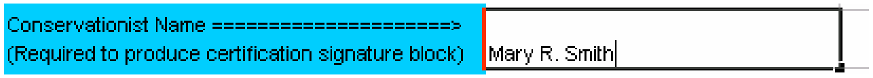


4. The first row displays the pathname for the Standards and Specifications database. Do not change this information.
5. The second row shows a check box to display the practice narrative for each contract item. To turn off the option, click the check box.
6. The third row displays a value for the **Total Acres** under contract. This value is the sum of the land unit acres for each land unit in the contract.
7. **Contract Number** is displayed if it was entered in the Contract Wizard. Click in the empty cell on the right to type the contract number.



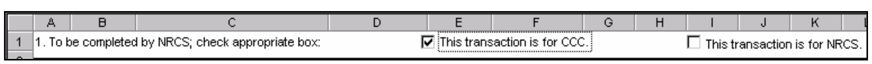
8. Type the name of the county where the contract is located in the empty cell on the right of **County Name**.
9. Type the state where the contract is located in the empty cell on the right of **State Name**.

10. For **Conservationist Name** type the name of the designated conservationist who will sign the form. Type the name in the empty cell on the right to add a signature block on the last page of the form.

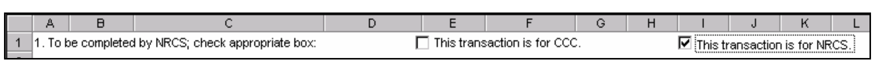


11. For Conservationist Title, accept the default title or change it.

12. If the Conservation District will sign the form, type the conservation district name to add a signature block on the last page of the form.
13. For **Other Sponsoring Agency**, type the name of the agency, e.g. Farm Service Agency, if another agency will sign the form. This adds a signature block for the agency on the last page of the form.
14. Click in an empty cell in the worksheet, then click the **Hide and go to Contract worksheet** button to return to the Contract worksheet.
15. If a **recurring schedule** is needed for one or more contract items, to Section *Enter a Recurring Schedule* for instructions.
16. Click the **Produce Document** button at the top of the Contract worksheet to load the contract information into the form. If the contract has many items, it may take a few moments to load.
17. If the contract is cost-shared by a CCC program, click the check box for "This transaction is for CCC" in line 1 of the spreadsheet.



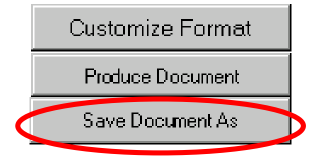
18. If the contract is cost-shared by a NRCS program, click the check box for "This transaction is for NRCS" in line 1 of the spreadsheet.



19. To adjust the page breaks for the form, select the Excel **View**, then select **Page Break Preview**. Adjust the page breaks as needed.

Produce and Print a Contract

20. To print the contract, select the Excel **File** menu, then select **Print**, or click .
21. Click the **Save Document As** button at the top of the Contract worksheet to save the file in the customer's **Contract_Reports** folder.



22. Close Excel.

Enter a Recurring Schedule

Step-by-Step Instructions

1. Click the **ContractData** worksheet tab at the bottom of the Excel window.

2. Locate the practice with the recurring schedule. Scroll to column **Q**, **Planned_Year**, and click once in the Planned Year cell.
3. Move the mouse over the bottom right corner of the cell until the cursor changes to . Hold down the left mouse button while you drag the cursor to the right. As you move the cursor across the cells, the years increment by one for each cell.
4. Repeat step 2 and 3 as needed for other practices with recurring schedules. If other practices have the same recurring schedule, copy the schedule cell(s) and paste them in another row.

Customize the Contract Template Files

If you find that you customize the contract support document in the same way for every contract, you may want to customize the contract template instead. Common customizations include:

- Entry of County and State.
- Entry of the name and title of the conservationist who will sign the contract
- Entry of the conservation district name
- Entry of the sponsoring agency name
- Display of practice narratives
- Changes to the standard statements

Two new contract templates are installed with Customer Service Toolkit 3.1:

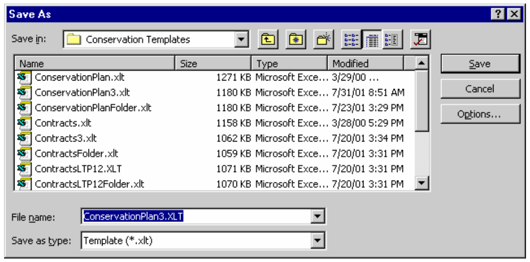
- ContractAD_1155.xlt
- ContractAD_1156.xlt

You may want to customize an AD-1155 template for CCC programs and one for NRCS programs.

Step-by-Step Instructions

1. Set the folder permissions for the template folders using the procedure in *Appendix: Setting Permissions to Modify Plan Templates* on page A-1.
2. Browse to this folder on the **Toolkit Central** computer:
   C:\Program Files\Microsoft Office\Templates
   USDA Workgroup Templates
3. Right-click on **ContractAD_1155.xlt**.
4. Select **Copy** from the pop-up menu.
5. Right-click on a blank area of the file display and select **Paste** from the pop-up menu. This pastes a backup copy of ContractAD_1155.xlt into the USDA Workgroup Templates folder.
6. Double-click on **ContractAD_1155.xlt** to open the file in Excel. An Excel message warns that the document contains macros.
7. Click the **Enable Macros** button to continue.
8. Use Excel to set the desired options for the template.

9. To save your changes, select the Excel **File** menu, and then select **Save As**.
10. Enter the file name under which you want to save the template.



11. Make sure that the **Save as type:** option is **Template (*.xlt)**.
12. Click the **Save** button. (Do not save the template by clicking the **Save Plan As** button at the top of the Plan worksheet. This saves the file in the .xls spreadsheet format instead of .xlt template file format.)
13. Repeat steps 6-12 of this procedure for each template you want to customize.
14. Copy the customized templates from Toolkit Central any other workstations in the office that need them.

Revise a Contract

There are two options for revising contract support documents:

Option 1: Edit the contract worksheet in **Excel**, then save the file to a name such as <contract number>Rev1.xls. This option is recommended when only minor changes are needed. Edits made to the contract document are stored in the Excel spreadsheet, not in the customer's database. Refer to Section *Revise a Contract Support Document* below for instructions.

Option 2: Revise contracts with the **Contract Wizard**. A contract revision form AD-1156e is produced with this option. Revisions are saved in the customer's database. Refer to Section *Revise a Contract with the Contract Wizard* for instructions.

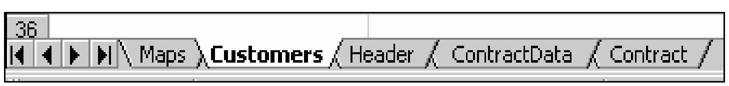
Revise a Contract Support Document

Step-by-Step Instructions

1. Start **Outlook** and click on the **Toolkit Customers** folder to display the list of contacts. Double-click on the customer's contact to open it.
2. Click the **Customer Folder** tab on the customer's Outlook contact form, then select the **Contract_Reports** folder. Double-click the contract file to start Excel.
3. Click the **Enable Macros** button to open the spreadsheet.

Click a worksheet tab at the bottom of the Excel window to open a worksheet with contract information.

Click the **Customer** tab to change participant information.



Click the **ContractData** tab to change contract item data.

Click the **Header** tab to change the contract formatting options.

Revise a Contract

Click the **Customers** worksheet tab to add or edit participant name and address information. Edits are saved in the spreadsheet, not in Outlook.

Line 2 - Shows column headings and should not be changed.

Line 3 - Shows the customer's name and business name with additional data. Edit information as needed.

Line 4 - Shows data for a participant. Edit the information or add participants. The list is terminated by the first blank line.

	A	B	C	D	E
1		CUSTOMER DATA IN TABULAR FORM			
2	Customer_Name	Customer_Address	City	State	Zip
3	Smith, John	33 County Road 9	Centerville	FL	55555-5555
4	Smith, Sally	33 County Road 9	Centerville	FL	55555-5555
5					

Click the **Header** worksheet tab to select options for customizing the appearance of the contract document. Refer to the previous Chapter *Produce and Print a Contract* for detailed instructions.

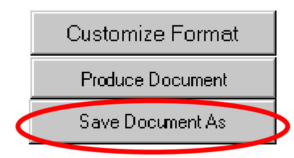
Click the **ContractData** worksheet tab to add or edit contract item and subitem numbers, land units and practice data. Add or edit a recurring schedule starting in column Q.

Click the **Contract** tab at the bottom of the Excel window.

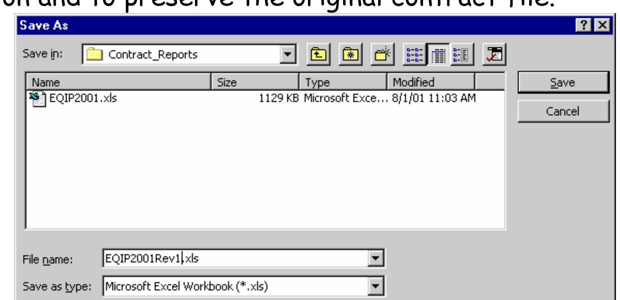
Click the **Produce Document** button at the top of the worksheet.

To print the contract, select the Excel **File** menu, then select **Print**, or click .

Click the **Save Document As** button at the top of the Contract worksheet to save the file in the customer's **Contract_Reports** folder.



On the **Save As** dialog box, change the name of the file to reflect the revision and to preserve the original contract file.

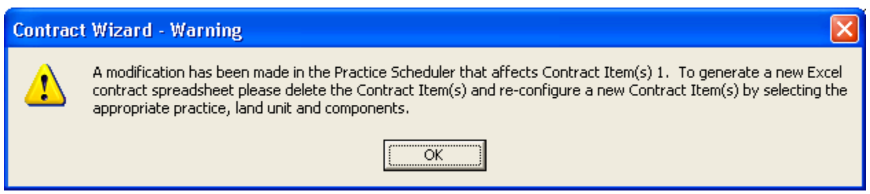


Revise a Contract with the Contract Wizard

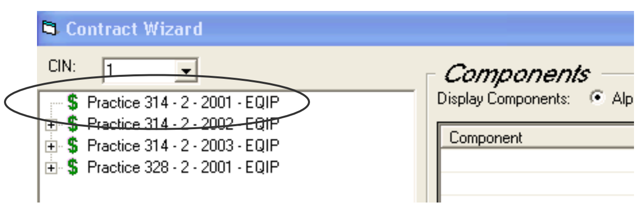
This section provides instructions on how to use the Contract Wizard to develop a contract revision document, AD-1156e. Contract revisions are saved in the customer's database and overwrite the original contract data. This section provides instructions for these revisions:

- Edit a contract item—change amount, unit cost, share rate
- Delete a contract item
- Add a contract item
- Add land units to a contract item
- Remove land units from a contract item

NOTE: If you open the Contract Wizard with an existing contract after you changed information (land unit, practice, narrative, year, or Cost-Share Program) in the Practice Scheduler, you may receive the following message, suggesting that you delete those items and re-configure new Contract Item(s) to reflect the changes made:



Items that need to be deleted and reconfigured are displayed *without* a "+" sign in the Practice list on left side of the Contract Wizard screen:



Select Practices and Start the Contract Wizard

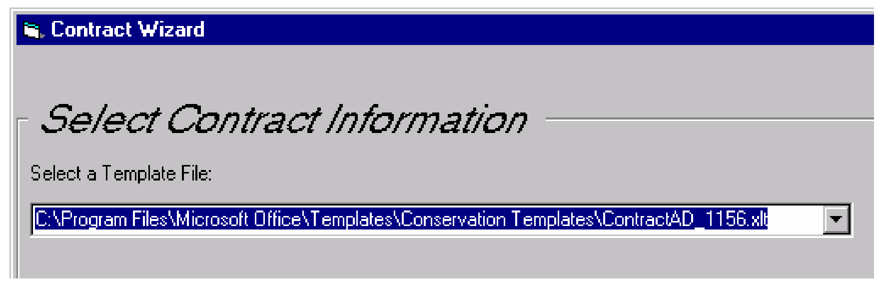
Step-by-Step Instructions

1. Start **Outlook**. Click on the **Toolkit Customers** folder to display the list of contacts. Double-click on the customer's contact.
2. Click the **Land Units** tab on the Outlook contact form.
3. Click the **Practice Schedule** button to start the Practice Schedule.
4. Select the original contract land units in the **Land Units** area.
5. Select the practices from the original contract from the **Schedule** grid.
6. Click the **Contract Wizard** button to start the Contract Wizard.

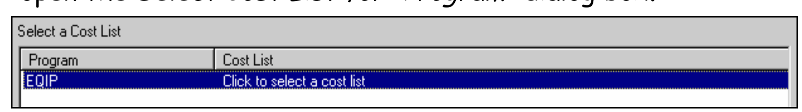
Revise the Contract

Step-by-Step Instructions

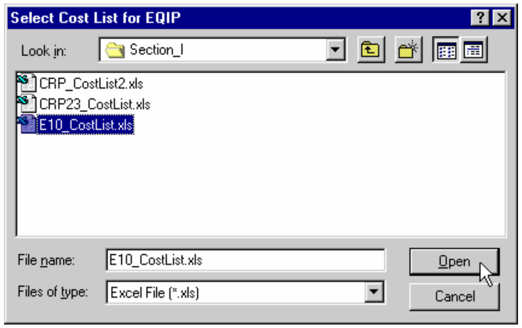
1. On the *Select Contract Information* dialog box, click the button to display the template choice list. Select **ContractsAD_1156.xlt** from the list.



2. Click the button to display the **Contract Identifier** choice list. Select the identifier for the contract you want to revise.
3. If **Contract Number** was not entered previously, type one below **Enter a Contract Number**.
4. For **Select a Cost List**, click once on a program in the list to open the *Select Cost List for <Program>* dialog box.



5. Select the cost list file that was used for the original contract, then click **Open**.



6. Repeat steps 4 and 5 if there are other programs in the list.
7. Click **Next** to display the *Contract Items* dialog box.
8. Follow the instructions in the sections below for the type of revision that is needed.

Edit a Contract Item

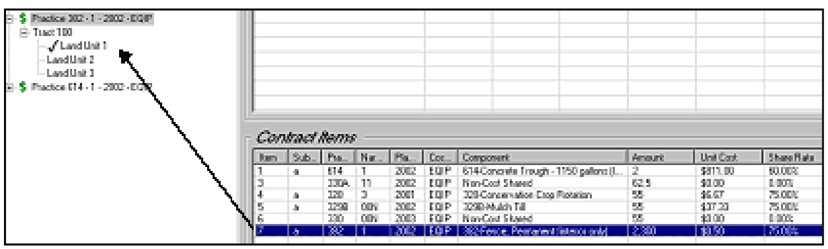
Edit contract items by changing the values entered for **Amount**, **Share Rate**, or **Unit Cost** in the **Component** grid.

Note: To update the Program Cost:

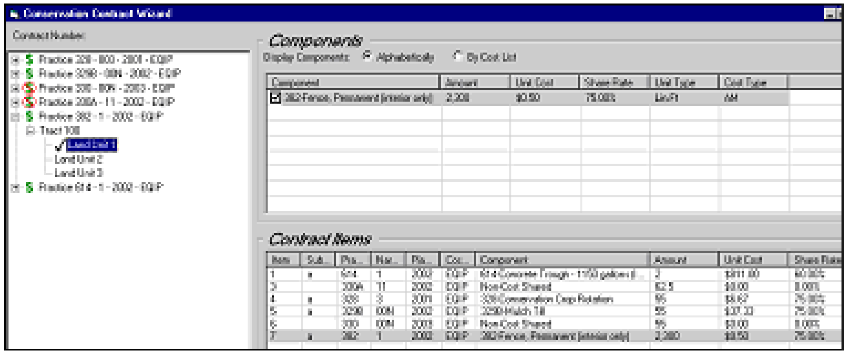
- The **Prog Cost** updates automatically when you change the **Amount** in the Component grid or Contract Items grid.
- You can change the **Unit Cost** and **Share Rate** in the Component grid only.
- If you change the **Unit Cost** and **Share Rate**, the **Prog Cost** will not automatically update until you double-click on the Amount and press **Enter**.

Step-by-Step Instructions

1. Select a **Contract Item** in the **Contract Item** grid. When an item is selected, the practice and land units become visible in the **Practices** area.



2. Click once on a scheduled land unit to display the contract item component(s) in the **Components** grid.

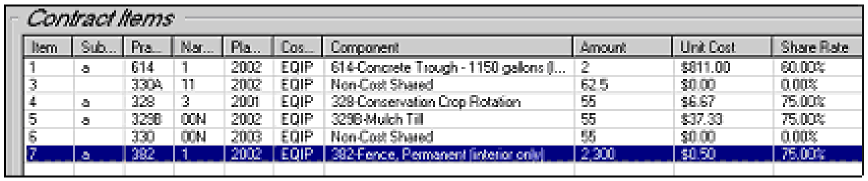


3. Double-click in the **Amount** cell in the **Components** grid to select it. Change the value, then press **Enter**. This updates the **Amount** cell in the **Contract Items** grid automatically.
4. Double-click in the **Unit Cost** cell in the **Components** grid to select it. Change the value, then press **Enter**. This updates the **Unit Cost** cell in the **Contract Items** grid automatically.
5. Double-click in the **Share Rate** cell in the **Components** grid to select it. Change the value, then press **Enter**. This updates the **Share Rate** cell in the **Contract Items** grid automatically.
6. Click **Save** to save the revisions in the customer's database. This action overwrites the original contract data in the database.
7. Repeat steps 1-6 to edit other contract items.

Delete a Contract Item

Step-by-Step Instructions

1. Select the contract item. Press the **Delete** key on the keyboard.



Contract Items

Item	Sub...	Pra...	Nar...	Pla...	Cos...	Component	Amount	Unit Cost	Share Rate
1	a	614	1	2002	EQIP	614-Concrete Trough - 1150 gallons (I...	2	$811.00	60.00%
3		330A	11	2002	EQIP	Non-Cost Shared	62.5	$0.00	0.00%
4	a	328	3	2001	EQIP	328-Conservation Crop Rotation	55	$6.67	75.00%
5	a	329B	00N	2002	EQIP	329B-Mulch Till	55	$37.33	75.00%
6		330	00N	2003	EQIP	Non-Cost Shared	55	$0.00	0.00%
7	a	382	1	2002	EQIP	382-Fence, Permanent (interior only)	2,300	$0.50	75.00%

2. Click the **Save** button to remove the item from the customer's database.
3. Repeat steps 1 and 2 to delete other contract items.

Add a Contract Item

Step-by-Step Instructions

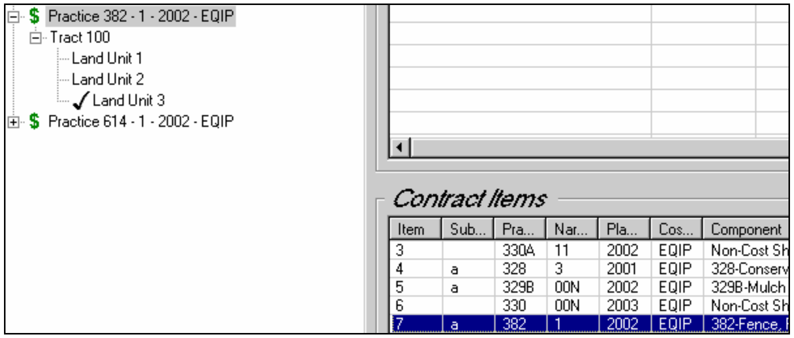
1. Review the practices in the **Practice** list on the *Contract Items* dialog box.
2. If the practice for the new contract item is in the list, skip to step 7.
3. If the practice for the new contract item is **not** in list, it must be selected or added from the Practice Schedule. Click **Cancel** to close the Contract Wizard and return to the Practice Schedule.
4. Review the practices in the **Schedule** grid. If the practice is displayed, select it along with the practices from the original contract. If the practice is not displayed, select the land unit where the practice is scheduled from the **Land Units** area to add it to the grid. If the practice has not been scheduled, click the **Add Row** button to add a blank row to the **Schedule** grid.
5. Complete the required information and select a program in the **Cost Share** cell.
6. Select the new practice along with the practices from the original contract in the **Schedule** grid.
7. Click the **Contract Wizard** button to start the Contract Wizard.
8. If the item is cost-shared, follow the steps in Chapter *Develop a Contract with the Contract Wizard*, Section *Add Cost-Shared Items to a Contract.*

   If the item is non cost-shared, follow the steps in Section *Add Non Cost-Shared Items to a Contract.*
9. Repeat steps 1-7 for each new contract item.

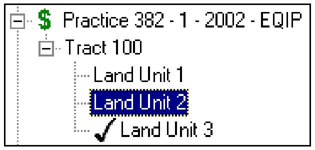
Add Land Units to a Contract Item

Step-by-Step Instructions

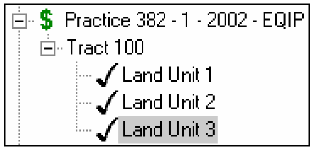
1. Select a contract item in the **Contract Items** grid. The practice and land units for the item become visible in the **Practices** area.



2. Click on a land unit to select it.



3. Select a component in the **Components** grid. Accept **Amount** or type a value. Accept **Unit Cost** or change the value. Accept **Share Rate** or change the value. When the first component is selected for a land unit, the land unit is checked in the **Practices** list.

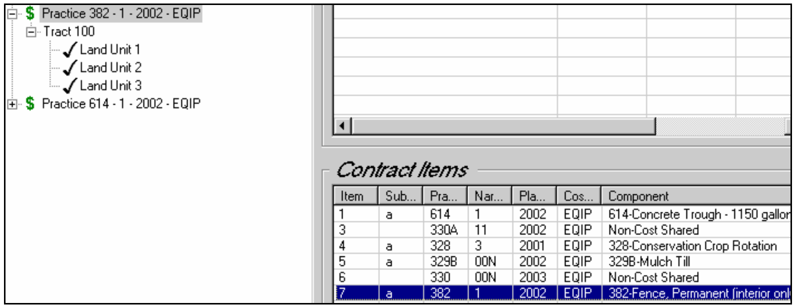


   The first time a component is selected for a practice, a **Subitem** is added to the **Contract Item** grid. If the same component is selected again for the practice, the Subitem **Amount** is updated. The Subitem also shows changes made to **Unit Cost** and **Share Rate**. Select additional components as needed for the land unit.
4. Repeat steps 2 and 3 to add other land units to the contract item.
5. Repeat steps 1-3 to add land units to other contract items.
6. Click **Save** to save the revisions in the customer's database.

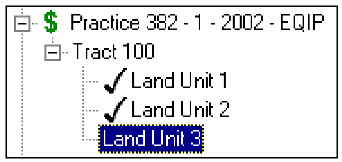
Remove Land Units from a Contract Item

Step-by-Step Instructions

1. Select a contract item in the **Contract Items** grid. The practice and land units for the item become visible in the **Practices** area.



2. Click the check mark ✓ next to a land unit to unselect it. The cells in the **Contract Item** grid are updated automatically.



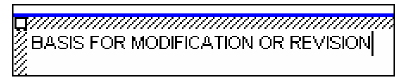
3. Repeat step 2 to remove other land units from the contract item.
4. Repeat steps 1 and 2 to remove land units from other items.
5. Click **Save** to save the revisions in the customer's database.

Produce and Print the Contract Revision Document

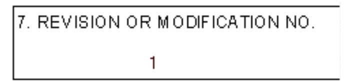
Follow the steps 1 through 12 in Chapter *Produce and Print a Contract* to produce a contract revision form AD-1156e, then follow the steps below to print it. (If you click the **Produce Document** button after entering these items entered, they are blanked out.)

Step-by-Step Instructions

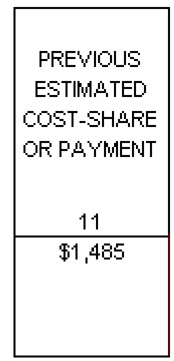
1. Click the **Customize Format** button.
2. Click once in the box **Basis for Modification or Revision**:



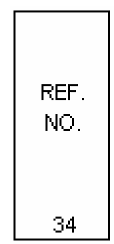
3. Type **Revision Number** on the Contract worksheet in Block 7.



4. Type the reason for the modification or revision.
5. Click once outside the **Basis for Modification or Revision** box.
6. Click the **Hide and go to Contract Worksheet** button.
7. Click the **Produce Document** button.
8. Type **Previous Cost Share** with currency format in Block 11:



9. Type the **Ref. No.** in the box below Block 34:



Maintain Cost Lists

The Toolkit **Contract Wizard** uses cost lists to build contract items and calculate cost share amounts for the contract support documents. This chapter provides instructions on how to locate cost lists, maintain them in the required format, and develop new cost lists with a template.

Because the Contract Wizard reads data directly from a cost list, it expects to find this information in specific columns and in specific formats. The Toolkit provides a pre-formatted template cost list spreadsheet to assist you.

If data was transferred from FOCS, cost list information was loaded into spreadsheets. One spreadsheet was created for each fund source. Refer to the first section below for instructions on how to locate these spreadsheets.

If data was not transferred to FOCS, skip the first two sections *Locate a Cost List*, and *Edit a Cost List* and continue with the third Section *Develop a New Cost List.*

If you share Toolkit data with other workstations in your office, edit and develop new cost lists on the **Toolkit Central** computer. After a cost list is edited or a new one added, copy the cost list to the other workstations in the office.

Locate a Cost List

Step-by-Step Instructions

1. On **Toolkit Central**, start Windows Explorer and browse to:

C:\Field_Office_Tech_Guide\Section_I

2. Double-click on a cost list file to open it in **Excel**.

You may also start **Excel** then click on the **File Open** menu to browse to the cost list file.

If data was transferred from FOCS, a cost list spreadsheet was created for each fund code. The spreadsheet file was named

<fund source>_CostList.xls

Edit a Cost List

Edits to cost list spreadsheets are made in the same way that edits are made to any spreadsheet. However, because a template is used to create Toolkit cost lists, additional guidance is needed. Follow this guidance in this chapter to avoid problems with the Contract Wizard.

NOTE: Cost lists that were transferred from FOCS with **Toolkit 2.0** must be reformatted before they may be edited. Cost lists transferred from FOCS with Toolkit 3.0 or greater do not need to be reformatted. Follow these steps to reformat a cost list:

1. Highlight columns A through H. Click on column A, then hold down the left mouse key and drag the mouse to column H.
2. Select the Excel menu **Format**, then select **Cells**.
3. On the *Format Cells* window, click the **Number** tab.
4. For **Category**, select **Text**.
5. Click **OK.**

A cost list spreadsheet has eight columns. **DO NOT add, move, remove, or rename** any of the columns.

	A	B	C	D	E	F	G	H
1	Practice_Code	Cost_Share_Program	Practice_Name	Component	Unit_Type	Unit_Cost	Cost_Type	Share_Rate

Column A – Practice_Code lists the codes for the practices included in the program. The Contract Wizard displays a component only when a practice code in this column matches a practice code in the **Practice_Lookup** table in **StandSpec.mdb**. The **Practice_Code** may be six characters or less.

Column B – Cost_Share_Program lists program acronyms, for example EQIP or WRP. The values in this column are for reference only. They do not appear on the contract support document. The program name that appears in the document comes from the Cost Share Program entered in the Practice Schedule.

Column C – Practice_Name lists practice names. The practice names in column are for reference only. They do not appear on the contract support document. The practice name that appears on the contract support document comes from the **Practice_Lookup** table in the Standards and Specifications database.

Column D – Component lists practice components. Text entered in this column appears on the contract exactly as it is typed here. Use the Excel **Spelling** tool to correct errors.

Column E – Unit_Type is the unit of measure for the component, for example, AC., NO., or FT. Unit_Type may seven characters or less. The text entered in this column appears on the contract exactly as it is typed here. If component units match practice units, amount values are defaulted for component amount. Refer to the table in Section 8 for recognized matches.

Column F – Unit_Cost is the cost per unit of measure. The format is dollars and cents, for example, .50, 50.50, etc. Do not type commas for values equal to or greater than 1000.

Column G – Cost_Type is a two-letter abbreviation that indicates how the cost-share is calculated. The types include AC - Average cost, AA - Actual cost not to exceed average cost, FR - Flat rate, NC - Non cost-shared, AM - Actual cost not to exceed a specified maximum.

Column H – Share_Rate is the cost share rate. If you enter 50, the Contract Wizard interprets the cost share rate as 50%. If you enter .5, the Contract Wizard interprets the rate as 0.5%. If you enter 20.5, the Contract Wizard interprets the rate as 20.5%.

Add a Practice Component to a Cost List

Step-by-Step Instructions

1. To add a component to a cost list, place the cursor on the row number of any row except Row 1, then click to select the row.
2. To insert a blank row, select the Excel **Insert** menu, then select **Cells**. Enter information for the component, following the guidance in these sections.

   Do **NOT** add a practice component by placing the cursor in the first empty row of the spreadsheet, then entering the information. The Contract Wizard will not recognize the additional component unless you reset the area called Cost_List.
3. To sort the practices in the cost list, select the **Practice_Code** column, then click the **Sort** button. Select the **Component** column, then click the **Sort** button to view the practices associated with each component.

Save and Print a Cost List

The Contract Wizard expects to find the cost list in a specific location. Save the revised cost list in this folder:

C:\Field_Office_Tech_Guide\Section_I

You may want to give the cost list a new name to indicate the revision, and preserve the original cost list. Print a cost list with the same methods you would use to print any spreadsheet from Excel.

Develop a New Cost List

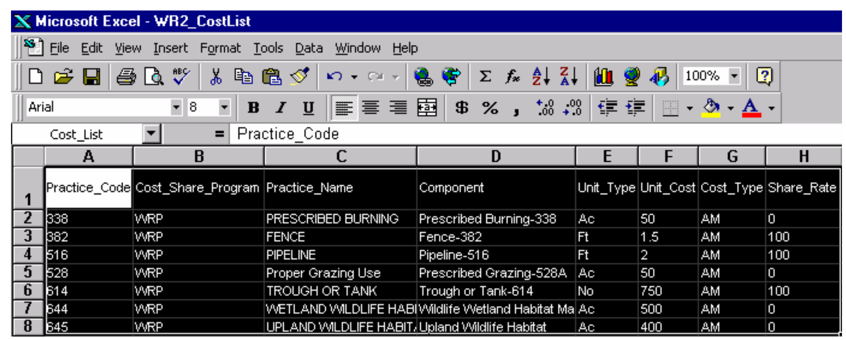
Step-by-Step Instructions

1. Browse to the folder

   C:\Program Files\Usda\Toolkit Express NT\Templates

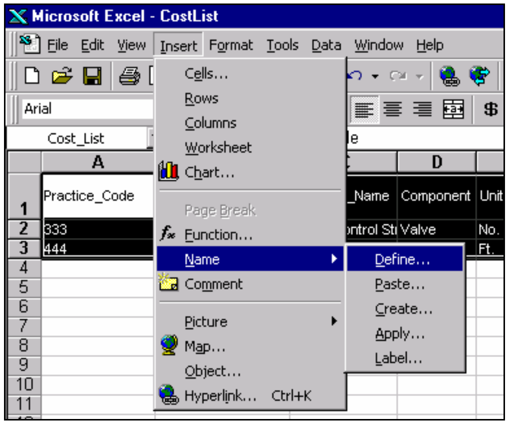
   To make the template easier to locate, you may want to copy it to

   C:\Field_Office_Tech_Guide\Section_I
2. Double-click on the template file **CostList.xlt** to open it in Excel. The template file may also be opened from the Excel **File Open** menu.
3. Add practice component information following the guidance provided in the previous sections.
4. When you finish entering information, redefine the area for the cost list worksheet. To redefine the area, select all the cost list columns and rows.

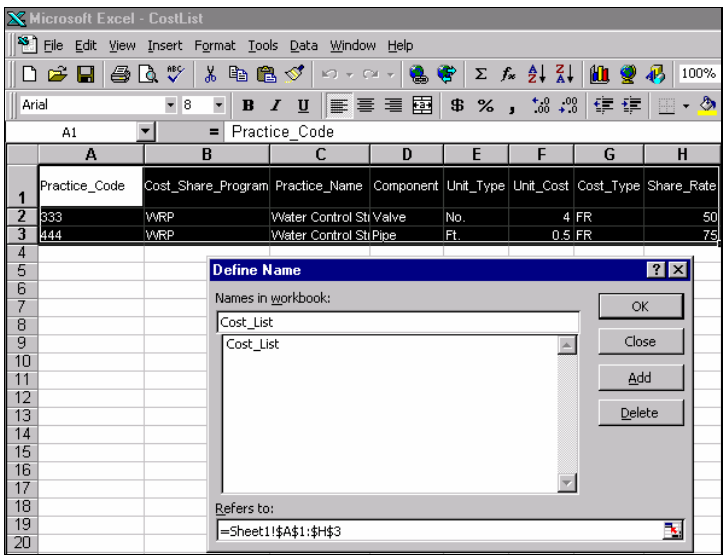


	A	B	C	D	E	F	G	H
1	Practice_Code	Cost_Share_Program	Practice_Name	Component	Unit_Type	Unit_Cost	Cost_Type	Share_Rate
2	338	WRP	PRESCRIBED BURNING	Prescribed Burning-338	Ac	50	AM	0
3	382	WRP	FENCE	Fence-382	Ft	1.5	AM	100
4	516	WRP	PIPELINE	Pipeline-516	Ft	2	AM	100
5	528	WRP	Proper Grazing Use	Prescribed Grazing-528A	Ac	50	AM	0
6	614	WRP	TROUGH OR TANK	Trough or Tank-614	No	750	AM	100
7	644	WRP	WETLAND WILDLIFE HABI	Wildlife Wetland Habitat Ma	Ac	500	AM	0
8	645	WRP	UPLAND WILDLIFE HABIT/	Upland Wildlife Habitat	Ac	400	AM	0

5. Click on the Excel **Insert** menu, then click on **Name** and **Define**.



6. On the **Define Name** dialog box, type **Cost_List** in the data field immediately below **Names in workbook**. Do ***not*** click on the name that appears in the area below, because it will revert to the former definition of the name and you will lose the changes you want to make.



7. Click **OK**.

8. Select the Excel menu **File**, then select **Save As**. Browse to

C:\Field_Office_Tech_Guide\Section_I

9. Replace the filename with an appropriate name.

10. Select **Save as type of** Microsoft Excel Workbook(*.xls).

11. Click **OK**.

12. Close Excel.

The cost list is ready for use with the Contract Wizard.

Copy Cost Lists to the Server

If you share Toolkit data with others in your office, new and revised cost lists should be copied to the FOTG folder on the service center server so that others may update the cost lists on their workstations and laptops. This ensures that everyone has the latest cost information.

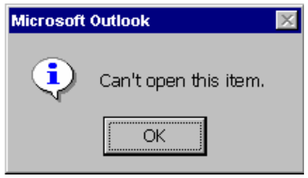
Screen Messages and Support

The Customer Service Toolkit operates with several commercial software products. Each product has screen messages that are displayed as you work. These messages are labeled with their product name.

Commercial Software Messages

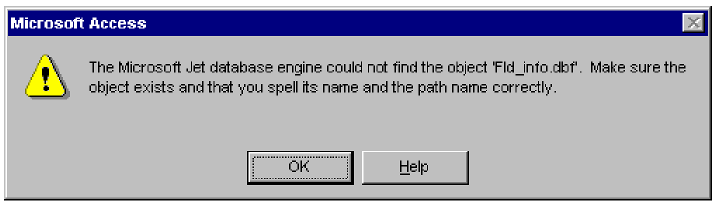
Information

An information message provides information about the results of a command.



Warning

A warning message informs you about a situation that may require a decision or correction, but does not stop the application.



Critical

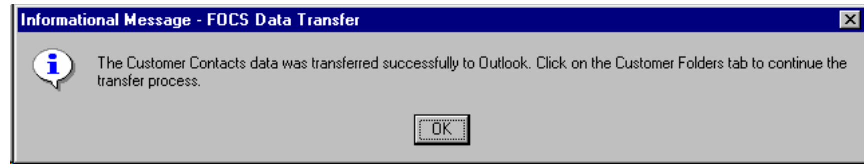
A critical message informs you about a situation that requires an intervention or correction before you can continue.

Customer Service Toolkit Messages

You will also see Customer Service Toolkit messages. Most Toolkit messages are labeled with the dialog box name or other identification to show where you are in the Toolkit application. The following symbols are used:

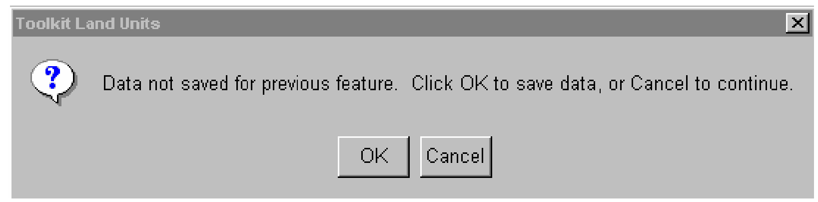
Information

An information message provides information about the results of a command.



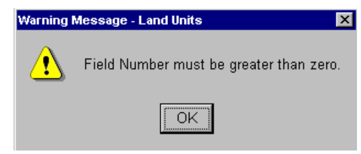
Decision

A decision message asks you to make a decision about the next step.



Warning

A warning message indicates that you must do something before you can continue with a process.



Critical

A critical message indicates a problem that requires attention. It may direct you to notify your support person or call the Help Desk.

Help Desk Support

Help Desk support is available weekdays from 6 AM to 6 PM Mountain Standard Time. The Help Desk telephone number is

888-311-1444

If you see a critical Toolkit message, record what you did just prior to the message, and any information about the problem that the message provides. If you have a support person easily available, leave the message visible until the support person can see it. To capture a message, simultaneously press the **Ctrl** and **Print Scrn** buttons on the keyboard, then start Microsoft Word and click Paste.

The Customer Service Toolkit Web Site

For more information about the Customer Service Toolkit, access the Toolkit Web site at

http://www.itc.nrcs.usda.gov/toolkit/

Topics on the Web site include:

- *What's New*, a list of recent updates to the Toolkit Web site.
- Information about current Toolkit software releases.
- Information about upcoming Toolkit software releases.
- *User's Guides*, the latest version of each Toolkit guide.
- *Hints and Tips*, documents with more information about Toolkit.
- *Issues and Solutions*, descriptions of problems and workarounds.
- *Support Calls*, brief discussions about current support issues.
- *IT Updates*, information about IT issues related to Toolkit.
- *More Tools*, software tools and electronic forms, developed by States.
- *Teaching Toolkit*, guides and presentations for training.
- *Sponsor's Corner*, information from the sponsors of Toolkit products.
- *Contacts*, names and telephone numbers of the people responsible for enhancements, support, and training.

Before you can customize a conservation plan or contract template, you must set the correct permissions on the folders that contain the templates. This procedure tells you how to let users in specific work groups modify plan templates.

Step-by-Step Instructions

1. Log in as administrator.
2. Open Explorer (right-click on **Start** and select **Explore** from the pop-up menu).
3. Browse to: **C:\Program Files\Microsoft Office**
4. Right-click on the folder **USDA Workgroup Templates**.
5. Select **Properties** from the pop-up menu. This displays the *Properties* dialog.
6. Click on the **Security** tab.
7. In the list of *Group or user names,* select the **Users** group that contains the users who need to modify templates.
8. Click on the *Allow* check box for *Full Control* in the *Permissions for users* list.
9. Click on the **Advanced** button. This opens the *Advanced Security Settings* dialog.
10. Click on the check-box next to: *Inherit from parent the permissions entries that apply to child objects. Include these with entries explicitly defined here.*
11. Click on the **OK** button. This closes the *Advanced Security Settings* dialog.
12. If necessary, repeat Steps 7 to 11 of this procedure for additional Users groups until you have included all users who need to modify templates.
13. Click on the **OK** button on the *Properties* dialog. The members of Users group will now be able to modify the templates.

Appendix: Setting Permissions to Modify Plan Templates

The end