

The Practice Schedule and Plan Wizard

Topics include:

- Selecting Conservation System Guides
- Scheduling Practices
- Creating a Plan Report

The Practice Schedule and Plan Wizard

Click on the Practice Schedule Tab.
Select a plan from the drop down list

The screenshot shows the 'Practice Schedule' tab selected. The 'Land Units' section has a dropdown menu set to 'Select a Plan'. The 'Conservation System' section has 'Guide' and 'System' fields set to 'Land Unit not selected'. The 'Schedule' section is empty. Buttons for 'Expand', 'Collapse', 'Select All', and 'Unselect All' are visible in the Land Units section. At the bottom, there are buttons for 'Add Row', 'Copy to Cell Below', 'Save', 'Plan Wizard...', and 'Contract Wizard...'. The user name 'Monica R Holley' and 'AUTHENTICATED' are shown at the bottom right.

Click Expand then Select All to see all the land units in the plan and show any previously planned practices.

The screenshot shows the 'Practice Schedule' tab with the 'Land Units' section expanded. The 'Plan' dropdown is set to 'Consplan'. The 'Land Units' list shows a tree structure with 'Tract 143' and 'Tract 144' expanded, and their respective land units checked. The 'Conservation System' section has 'Guide' and 'System' fields set to 'Some not selected'. The 'All Practices' section shows a list of practices with codes and names. The 'Schedule' section now contains a table with the following data:

Tract Number	Land Unit	Practice	Narrative	Planned Amo	Units	Month
143	3	702		1	no	08

Buttons for 'Expand', 'Collapse', 'Select All', and 'Unselect All' are visible in the Land Units section. At the bottom, there are buttons for 'Add Row', 'Copy to Cell Below', 'Save', 'Plan Wizard...', and 'Contract Wizard...'. The user name 'Monica R Holley' and 'AUTHENTICATED' are shown at the bottom right.

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Selecting a Conservation System Guide

To select a Conservation system guide, select (place check marks in front of) land units with the following common characteristics: NRCS Land Use, Common Resource Area (CRA) and soil type/slope class. The land unit's CRA can be seen on the Land Units tab. (For more information about CSGs contact your Area Resource Conservationist.) Then click Guides.

The screenshot shows the 'Customer Service Toolkit' interface. The 'Conservation System' section has 'Guide: Not selected' and 'System: Not selected'. The 'Guides' button is highlighted with a red arrow. A dialog box titled 'Conservation System Guides - Crop' is open, displaying a table of guides. A red arrow points from the 'Guides' button to the dialog box. A yellow callout box with a red arrow pointing to the first row of the table contains the following text: 'Select the guide with the appropriate soil type and slope class. To select the guide, click on the gray box in front of the Guide Code. Click OK.'

Guide Code	Guide Name
MI 98.6-CR-loam 8%	Cash crops: 6-12 % slopes; moderate erosion
MI 98.6-CR-sand 8%	Cash crops 6-12%; high wind erosion
MI 98.6-CR-loam 2%	Cash crops 0-2% slopes low erosion
MI 98.6-CR-loam 4%	Cash crops 2-6% slopes; moderate erosion
MI 98.6-CR-Sand4%	Cash crops 0-6%; well drained sands; irrigated
MI 98.6-CR-sandWD	Cash crops 0-6%; well drained sand
MI 98.6-CR-sandPD4	Cash crops 0-6% slopes; swp drained sand
MI 98.6-CR-sand 12	Cash crops > 12%; high erosion

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Click on Systems. Select the system that most closely matches the description of this plan. Click OK.

System C	System Name	System Description
R-gully	Grass ww & cover crop	Crop rotation and residue management
R-retired	conservation cover	Retired cropland.

Scheduling Practices

The practices in the selected conservation system guide (CSG) are shown in the middle of the screen. You may schedule practices from the CSG or from the 'All Practices' list.

Planned Amo	Units	Month	Year	Applied Amou	Applied Date	Program	Source
no		08	2006			EQUIP	Toolkit 5.0

The Practice Schedule and Plan Wizard

Customer Service Toolkit - TRAINING ARTHUR NORMAN \Arif_Norman_Sr-----ARLTNSR

File Tools Reports Help

General Assistance Notes Land Units Practice Schedule Customer File Reporting

Land Units

Plan: Consplan

- Tract 143
 - LandUnit 3 - Crop
 - 702 Agrichemical Mixing Facility
- Tract 144
 - LandUnit 1 - Crop
 - LandUnit 2 - Crop
 - LandUnit 3 - Crop
 - LandUnit 4 - Crop

Expand Collapse

Select All Unselect All

Conservation System

Guide: MI 98.6-CR-loam 8% Guides

Cash crops; 6-12 % slopes; moderate

System: R-gully Systems

Grass ww & cover crop

Code	Practice Name
328	Conservation Crop Rotation
329A	Residue Management, No-Till/Strip
329B	Residue Management, Mulch Till
340	Cover Crop
393	Filter Strip
410	Grade Stabilization Structure
412	Grassed Waterway
590	Nutrient Management

Select All Unselect All

All Practices

Code	Practice Name
396	Fish Passage
398	Fish Raceway or Tank
399	Fishpond Management
511	Forage Harvest Management
666	Forest Stand Improvement
655	Forest Trails and Landings
410	Grade Stabilization Structure
412	Grassed Waterway
548	Grazing Land Mechanical Treat
561	Heavy Use Area Protection
422	Hedgerow Planting
603	Herbaceous Wind Barriers
797	Invasive Plant Species Control
552	Irrigation Regulating Reservoir
436	Irrigation Storage Reservoir

Show Scheduled Schedule Practices

Schedule

Tract Number	Land Unit	Practice	Narrative	Planned Amo	Units	Month	Year	Applied Amou	Applied Date	Program	Source
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Save Plan Wizard... Contract Wizard...

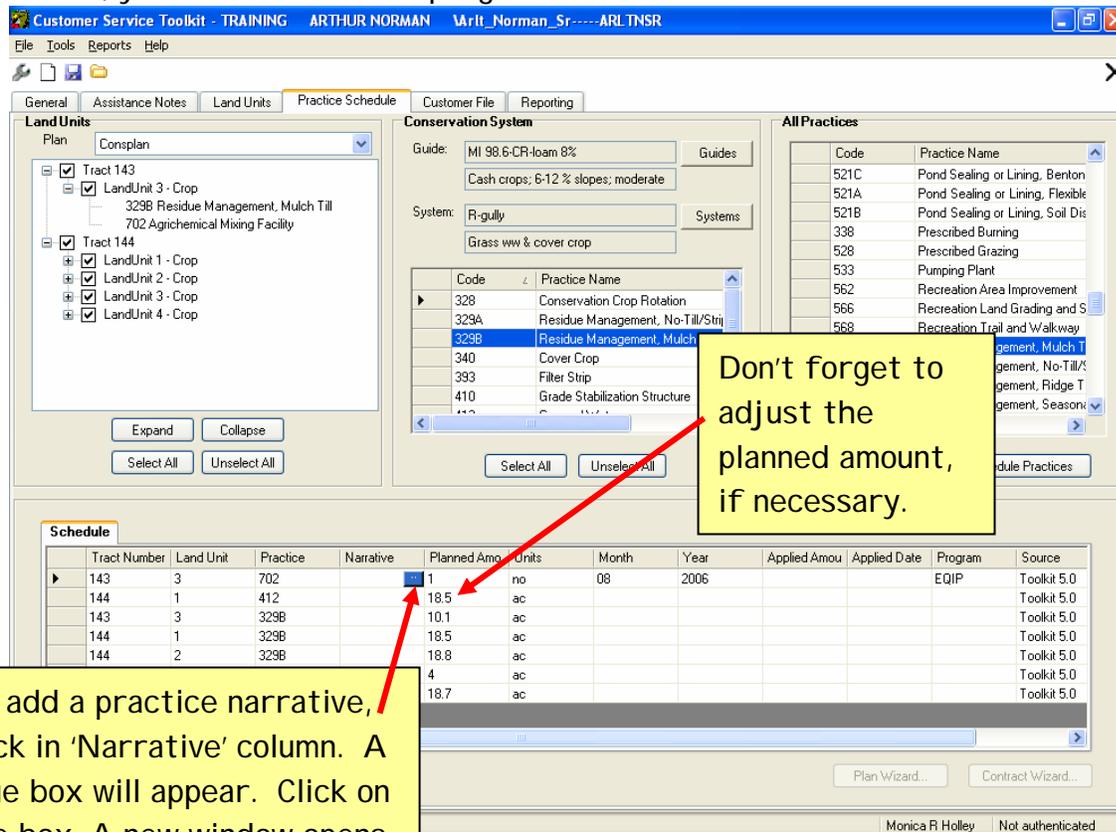
Monica R Holley Not authenticated

Practices will be scheduled on all selected land units (in this example, only Land Unit 1). Select the desired practice by clicking on the gray box in front of the practice code. Click Schedule Practices.

Note: To schedule multiple practices at one time hold down the 'CTRL' key and click to select additional practices. You can also re-order all of the columns on this screen by clicking on the column heading. For example, clicking on 'Practice Name' will sort the practices by name rather than by practice code.

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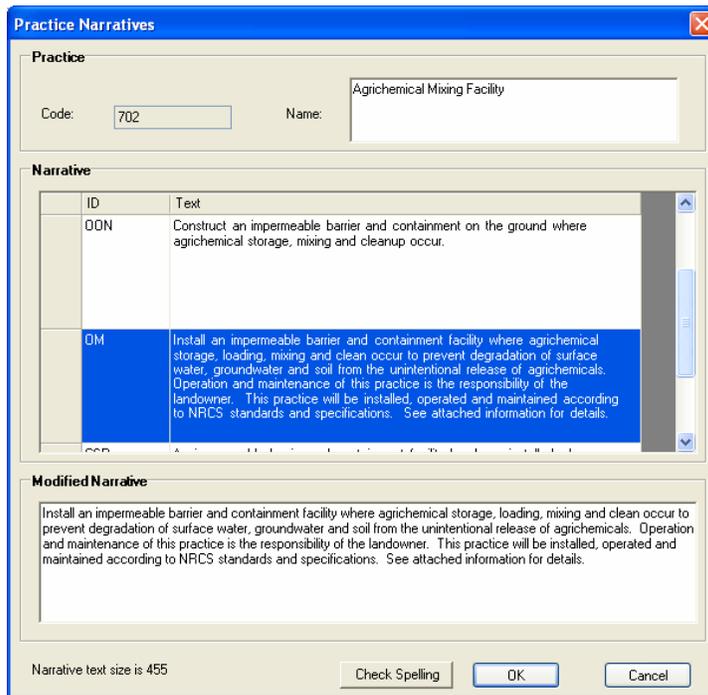
Complete the practice schedule by selecting a narrative and entering a planned month, year and installation program.



To add a practice narrative, click in 'Narrative' column. A blue box will appear. Click on the box. A new window opens.

Don't forget to adjust the planned amount, if necessary.

Select a narrative. You may modify the narrative at the bottom of the screen. A modified narrative will apply to ALL practices where you select the narrative with the same id in this plan.



New narratives (for use in many different plans) can be added in the Conservation Practice Standards Application (accessed from my.NRCS).

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Enter a planned month and year. Use the Copy to Cell below option to copy the information if needed.

Practice	Narrative	Planned Amo	Units	Month	Year	Applied Amou	Applied Date	Program	Source
702	DM	1	no	08	2006			EQIP	Toolkit 5.0
412	00N	18.5	ac	06	2006			EQIP	Toolkit 5.0
143	3 329B	DM	10.1	04	2007				Toolkit 5.0
144	1 329B		18.5						Toolkit 5.0
144	2 329B		18.8						Toolkit 5.0
144	3 329B		4						Toolkit 5.0
144	4 329B		18.7						Toolkit 5.0

To make a practice recurring, click the small blue 'R' in the year column. A new window will open.

Enter the information about the duration and interval of the recurring practice. This will need to be completed for each Land Unit where this practice reoccurs. Click OK.

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Complete the rest of the information in the practice schedule.

The screenshot shows the 'Practice Schedule' window in the Customer Service Toolkit. The 'Schedule' table contains the following data:

Tract Number	Land Unit	Practice	Narrative	Planned Amo	Units	Month	Year	Applied Amo
143	3	329B	OM	10.1	ac	04	2007	
144	1	329B	OM	18.5	ac	04	2007	
144	2	329B	OM	18.8	ac	04	2007	
144	3	329B	OM	4	ac	04	2007	
144	4	329B	OM	18.7	ac	04	2007	
144	1	412	00N	18.5	ac	06	2006	
143	3	702	OM	1	no	08	2006	
144	4							

A yellow callout box with the text: "Unneeded lines in the practice schedule can be deleted by clicking on the gray box in front of the extra line then hitting delete on your keyboard." points to the gray-shaded row for Tract 144, Land Unit 4.

The screenshot shows the 'Practice Schedule' window with the 'Schedule' table from the previous image. A yellow callout box with the text: "Save your practice schedule. Then the Plan Wizard should become active. Select the Plan Wizard." points to the 'Save' button and the 'Plan Wizard...' button at the bottom of the window.

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Creating a Plan Report

Select Template and Land Use

Select Template

Spanish Version

Planning Template for Folder

Planning Template

Select the land use category to use for the plan:

Use NRCS Land Use

Use Local Land Use

Select the Appropriate Options. Click 'Next'.

Cancel <-- Back Next --> Finish

Select Participants

List of Participants: [dropdown]

Customer Name: [input]

Address: [input]

City: [input]

State: [input]

Zip Code: [input]

Add

Select Associated Customers from the choice list or type in the boxes if necessary. Click 'Add'. Click 'Next'.
Note: The decision maker will automatically be added as a participant.

Name	Address	City	State	Zip Code
▶ ARTHUR NORM	5751 BYRON R	HOWELL	MI	48855
*				

Cancel <-- Back Next --> Finish

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You can customize how your plan is created by selecting different options on this screen.

You may enter Plan Objectives by typing in the box. They will appear at the top of the plan.

You can also enter Standard Statements by typing in the box or clicking on the '...'

Select the appropriate text file. Click 'Open'.

Note: You may create your own 'standard statements' by saving a plain text file (.txt) in the following location:

C:\Program Files\USDA\Toolkit5\Templates\PlanWizard

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The screenshot shows the 'Conservation Plan Wizard' window. It has a title bar with a close button. The main area is divided into several sections: 'Set Preferences' with 'Check Options' (all checked), 'Sort By' (set to 'Land Use'), and 'How to print Recurring Practices' (unchecked). The 'Signature Box' section contains text boxes for 'Field Office' (BIG RAPIDS SERVICE CENTER), 'Conservationist Name' (Monica Holley), 'Conservationist Title' (Certified Planner), and 'Conservation District' (MECOSTA CONSERVATION DISTRICT). Below this is a 'Standard Statements' section with a text area containing two paragraphs of text. The 'Plan Objectives' section has a text area with one paragraph. At the bottom, there are buttons for 'Cancel', '<-- Back', 'Next -->', and 'Finish'. A red arrow points to the 'Finish' button.

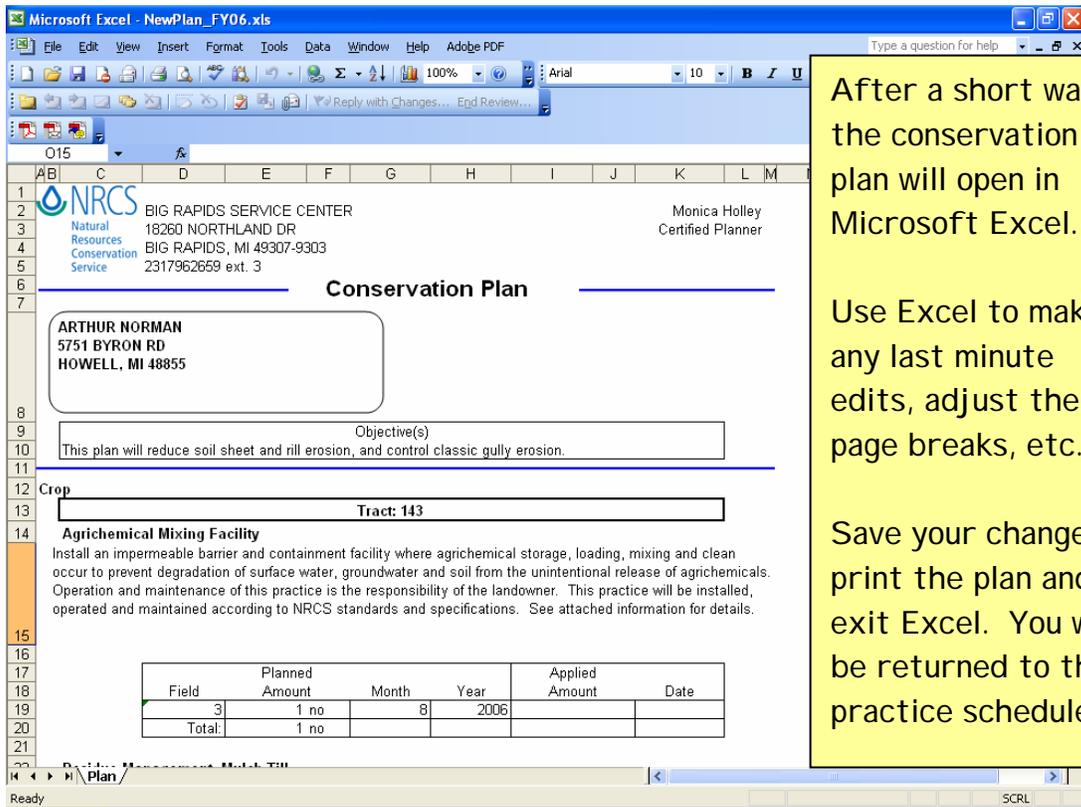
The text from the file will be copied into the appropriate box in the contract wizard. The Standard Statement will appear at the bottom of the plan just above the signature blocks.

Click Finish.

The screenshot shows the 'Save Excel File As' dialog box. The 'Look in:' field shows 'Plan_Reports'. The file list contains 'Job_Sheets' and 'Other_Implementation Information'. The 'File name:' field contains 'NewPlan_FY06.xls' and the 'Files of type:' field is set to 'Excel File (*.xls)'. There are 'Open' and 'Cancel' buttons at the bottom right. A red arrow points to the 'Open' button.

A new window will open. Enter an appropriate name for the plan. Click 'Open'.

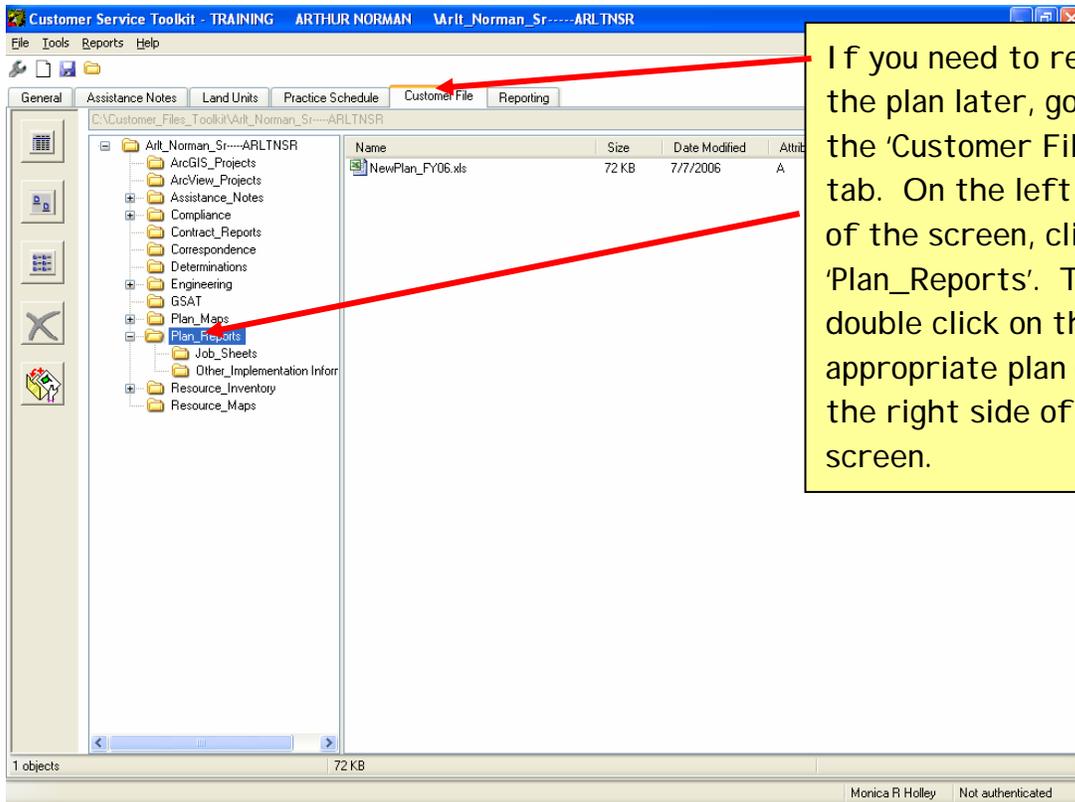
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After a short wait, the conservation plan will open in Microsoft Excel.

Use Excel to make any last minute edits, adjust the page breaks, etc.

Save your changes, print the plan and exit Excel. You will be returned to the practice schedule.



If you need to re-open the plan later, go to the 'Customer File' tab. On the left side of the screen, click on 'Plan_Reports'. Then double click on the appropriate plan on the right side of the screen.