Check-In Wizard

Abstract

The purpose of this guide is to provide details on how to run the Check-In Wizard, which checks the customer into the National Conservation Planning Database (NCPDB). This will allow users to work with older Toolkit 4.1 customer data in the new version of Toolkit.

Steps: Move Customer Folder to C drive – Run Check In Wizard – Delete Customer Folder from C drive.

Details:

Move Customer Folder to C drive

1. Navigate to *F:\Customer Files*, **right click** on the *Customer folder*, **click *Cut.***

2. Navigate to *C:\Check_In*, **right click** on the *Check_In* folder, **click *Paste***.

Run Check In Wizard

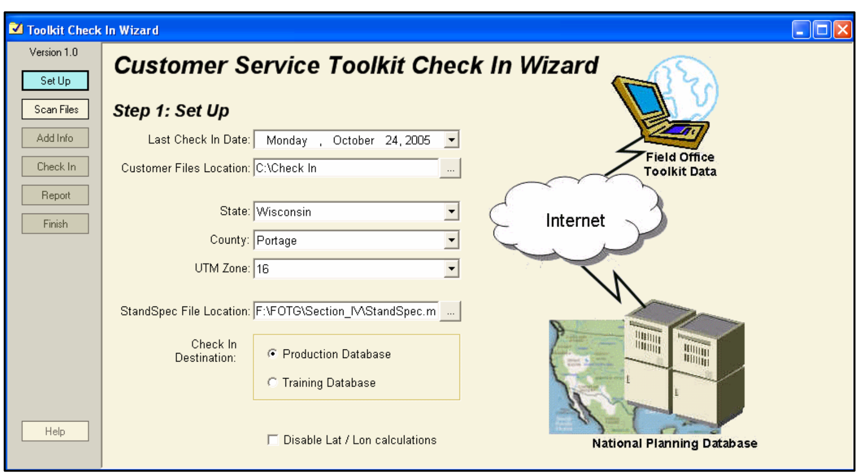
3. **Click** the ***Start button***, and navigate to:

   All Programs || Customer Service Toolkit || Toolkit Check In Wizard.

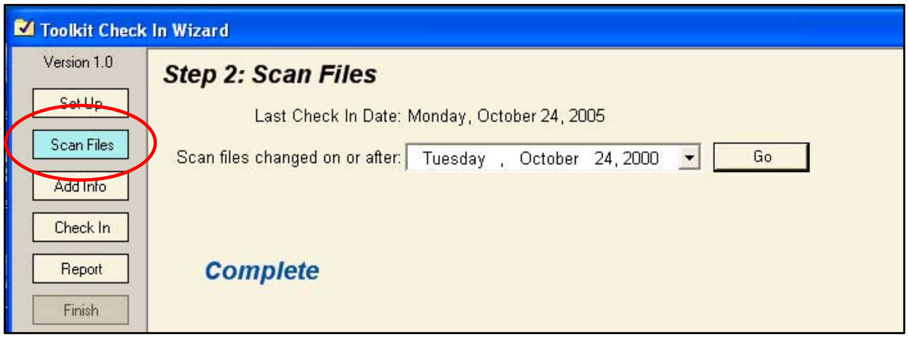
4. **Open** the Toolkit Check In Wizard.

   Note: The first time you use the Check In Wizard, you will need to set the following items on the Set Up screen.

   - Last Check In Date - Will default to today's date.
   - Customer Files Location - Use the Browse button to set this to C:\Check_In .
   - State & County - Make sure each has the correct value.
   - UTM Zone - Will default in correct zone based on the county that's selected.
   - StandSpec File Location - Use the Browse button to set this to F:\FOTG\Section_IV\StandSpec.mdb
   - Check In Destination - Production Database should be checked

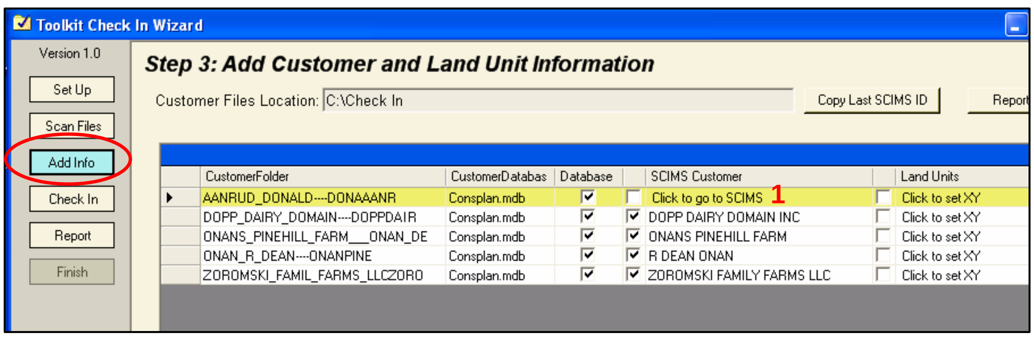


5. **Click** the ***Scan Files*** button.



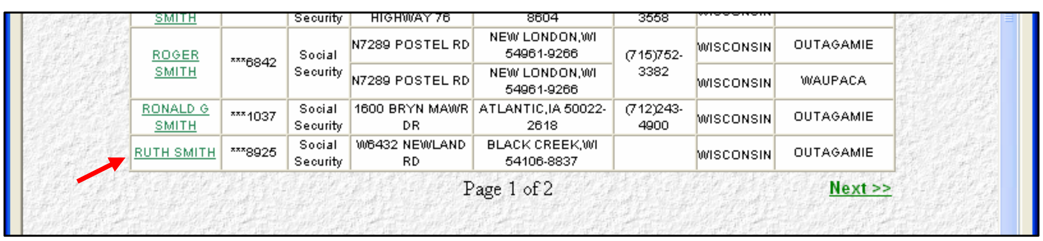
6. Change the year by **highlighting it** and **typing** in an earlier year. **Click** the ***Go*** button.

7. After the scan is complete, **Click** the ***Add Info*** button.

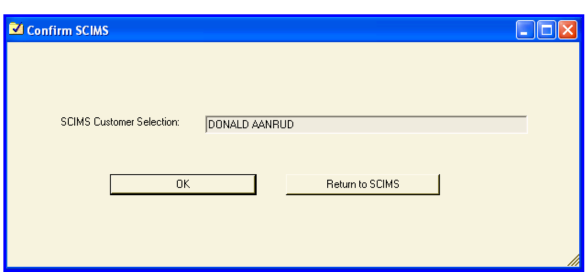


8. **Double Click** on the words *Click to go to SCIMS* (see graphic above – **1**).

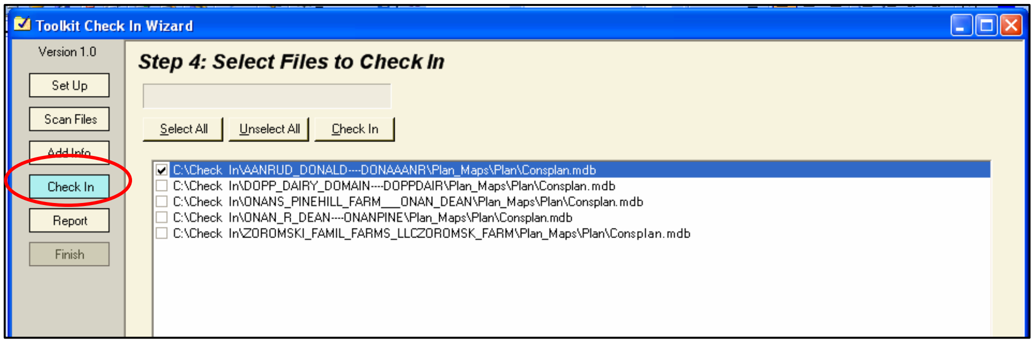
9. Locate the landowner in SCIMS, **click** on the name.



10. **Click** ***OK*** if the name is correct.



11. **Click** the ***Check In*** button.



12. **Place** a check mark next to the customer(s) that you want to check in.

13. **Click** the ***Check In*** button.

14. Verify that the folder will be checked into the Production Database. **Click *OK*.**

15. **Click** the ***Report*** button and verify that no files have failed to be uploaded into the National Database.

16. **Click *Finish*.**

<u>Delete Customer Folder from C Drive</u>

17. Once the customer folder(s) have been successfully uploaded into Toolkit, **delete** the folder(s) from *C:\Check_In* directory.