United States Department of Agriculture
Natural Resources Conservation Service

Kansas
Resource Conservation Staff

Toolkit
Task Guide #50
Archiving Customer Folders

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Abstract

The National Conservation Planning (NCP) database contains all conservation plans that are accessed from Customer Service Toolkit (Toolkit). Many of these plans are completed or have been delayed for implementation. In either case, the conservation plans should be set to a status of Archived to remove the data from projections for workload analysis and/or goals.

Customer folders that are archived will be easily distinguished from active customer folders on the Check-In/Out tab after the steps have been completed.

Two items of caution when archiving or deleting Toolkit customer folders or conservation plans:

- **Do not archive or delete customer folders that contain wetland determination information.**
- **Do not archive or delete conservation plans that have current fiscal year progress.**

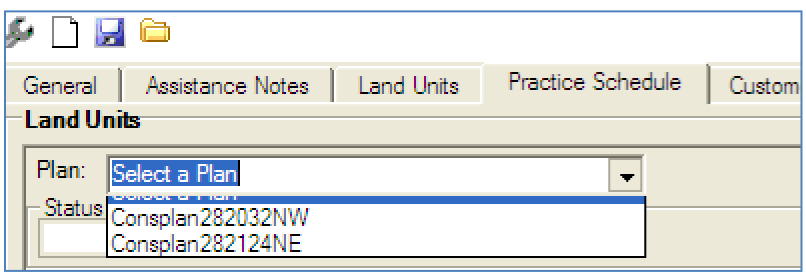
Instructions

1. Check-out the customer folder from the NCP database.

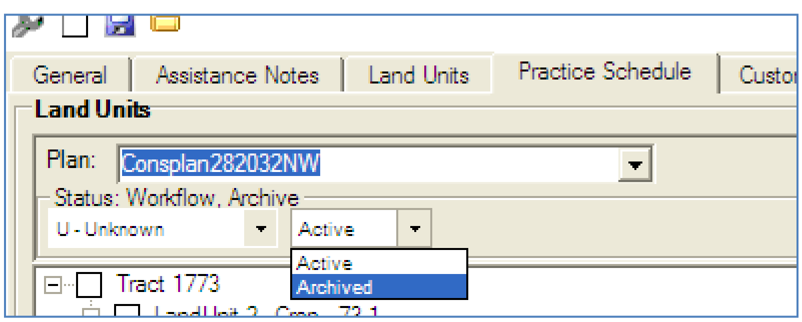
Converting a Conservation Plan to Archived Status

Note: Not all conservation plans in a customer folder will necessarily be switched to Archived. Valid active conservation planning or planning linked to a ProTracts contract should not be archived.

2. Open the customer folder and go to the **Practice Schedule** screen.
3. If multiple conservation plans exist, select one for review.



4. Review the land unit and conservation practice data and determine if the plan should be archived.
5. As appropriate, convert the Active/Archive status flag to Archived.
6. Repeat steps 3-5 for all additional conservation plans in the customer folder.

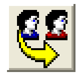


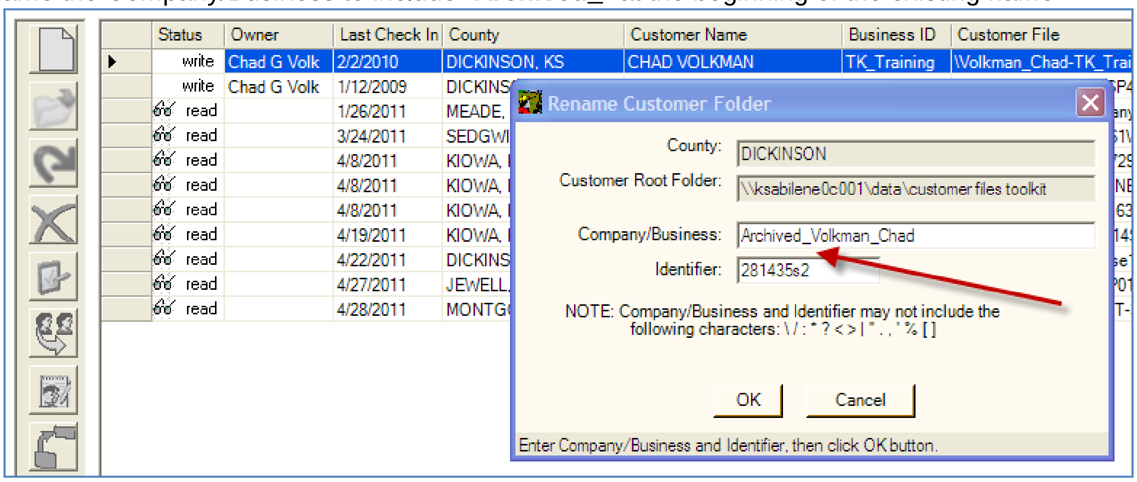
Renaming a Customer Folder for Archiving

Note: The Toolkit user must have Read Write All permissions to perform the steps below.

7. Close the customer folder and go to the **Toolkit Folders** tab.
8. Highlight the customer folder to rename.

Note: Only rename customer folders that have all conservation plan status set to Archived as described in steps 1 through 6 above.

9. Click the **Rename Folder** button 
10. Rename the Company/Business to include "**Archived_**" at the beginning of the existing name.



11. Click **OK.**
12. Check-in the customer folder to the NCP.

Customer folders that have been renamed are now easily distinguished by looking at the Customer File column on the Toolkit Check-In/Out screen.