USDA NRCS
United States Department of Agriculture
Natural Resources Conservation Service

Kansas
Resource Conservation Staff

IDEA
Task Guide #2
Spot Check Report – Practices Reported Applied in Current Fiscal Year

June 14, 2010

Abstract

The Integrated Data for Enterprise Analysis (IDEA) Practice Detail Report can be used to determine which practices and how many have been applied by a service center, management unit (MU), or area in the current Fiscal Year (FY). This task guide will outline the creation of a detailed Excel report with additional pivot tables displaying the number of practices applied by county in a MU.

Assumptions

User has an eAuth Level 2 account.

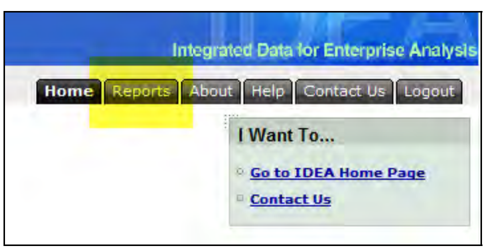
Notes

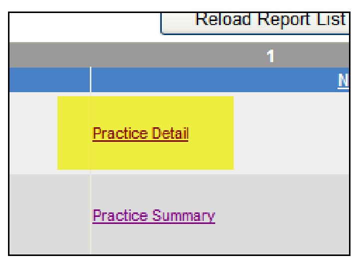
- The data contained within IDEA contains sensitive personal identifiable information (PII) and should be protected as your own. Data shall not be shared with non-Natural Resources Conservation Service (NRCS) employees and should be stored in a secure location on the network.

Instructions

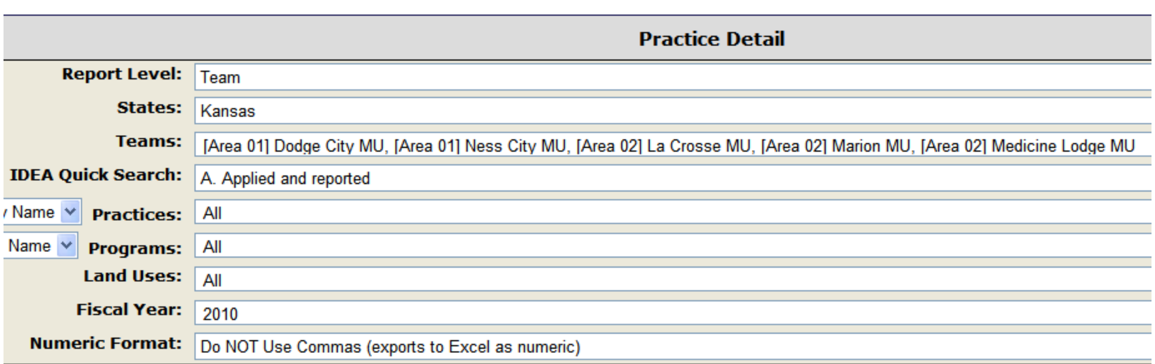
Generating and Saving the Report to Excel

1. Open the IDEA application from the my.NRCS Field Tools tab or go to the IDEA homepage at https://idea.sc.egov.usda.gov/IDEA/Home.aspx.
2. Click the **Reports** button and then open the **Practice Detail Report.**





3. Use the following filter options described below and displayed in the following screen shot.



Filter Options for the Practice Detail Report

Report Level: Team

Team: When selecting the team (MU) to run the report, select not only your MU but also the adjacent MUs. The Practice Detail Report is developed to show data by the county which will get progress for conservation, but we can pull the plan county from the report. Selecting the surrounding MUs will allow us to filter the Plan County attribute in the report and get all planning located inside and outside of the county or MU.

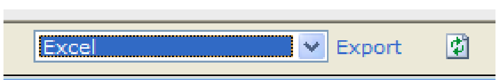
IDEA Quick Search: Use quick search Option A. Applied and reported. This will return all practices that have been reported as applied.

Practices: Select only the practices that should appear in the report. Most likely this will be all practices.

FY: Select the current FY.

4. Run the report by clicking the **Report** button in the upper right of the IDEA interface.

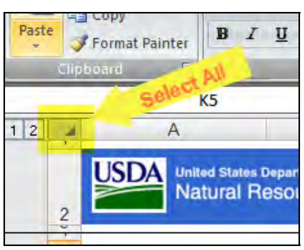
5. At the top center of the report, from the “Select a Format” list box, select **Excel** and then click **Export**.



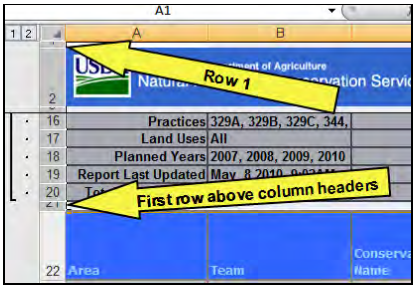
6. Use the Save dialog and navigate to an appropriate location and save the data.
   Note: This data should always be saved to an encrypted location on the workstation. PII data is included in the report and should be safeguarded.

Manipulating the Excel Document

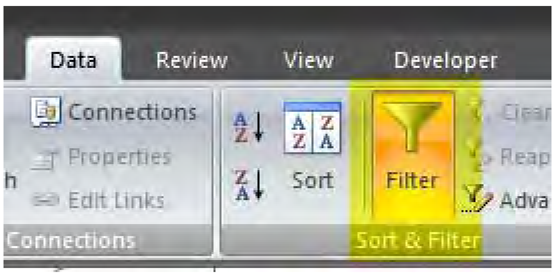
1. Open the newly created Excel file
2. Eliminate any merged cells in the spreadsheet by clicking the **Select All** button and then clicking the **Merge & Center** button under the Home Tab.



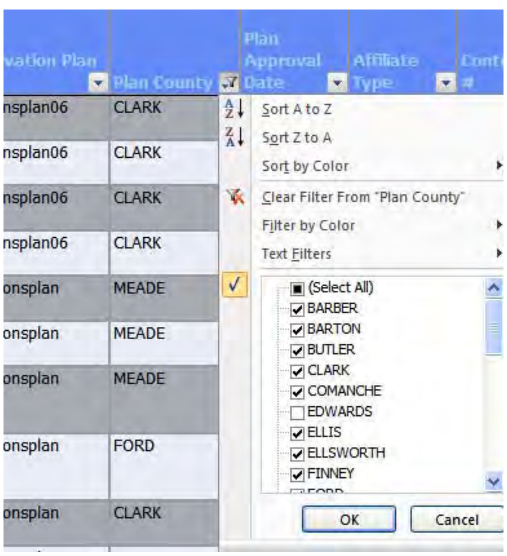
3. The first 21 records or so in the report are header information that needs to be deleted. Select all of the rows from 1 to the first row above the header information for the table.



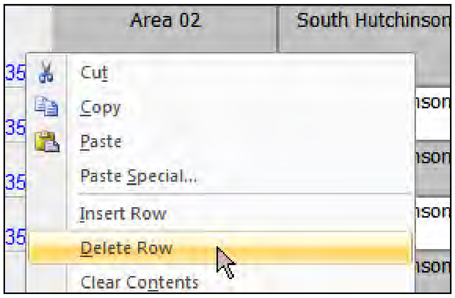
4. Right-click directly on the row indicators on the left of the spreadsheet and then click **Delete** to remove the header information from the table.
5. Click the **Filter** button from within the Data tab.



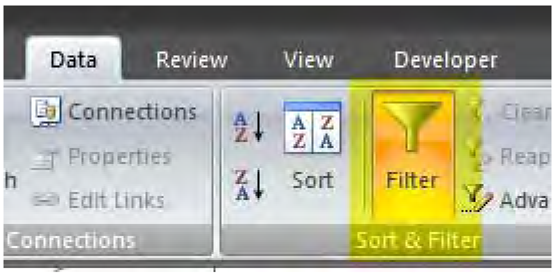
6. From the Plan County column filter list, <u>unselect</u> all counties you want to keep in the report.



7. Starting at row 2, select all rows to the bottom of the report. Include the row at the bottom that states who generated the report.
Note: This can be accomplished by selecting row 2 and then using the scroll bar to get to the end of the report and then do a shift-click on the last record.
8. Directly over the row indicators on the left of the spreadsheet, do a right-click and then click **Delete.**
Note: This deletes all records from the selected counties, leaving only the data planned by the unselected counties in the list.



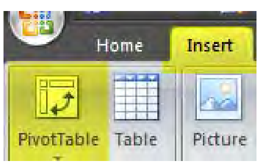
9. Remove all filtering by going to the Data tab and clicking the **Filter** button.



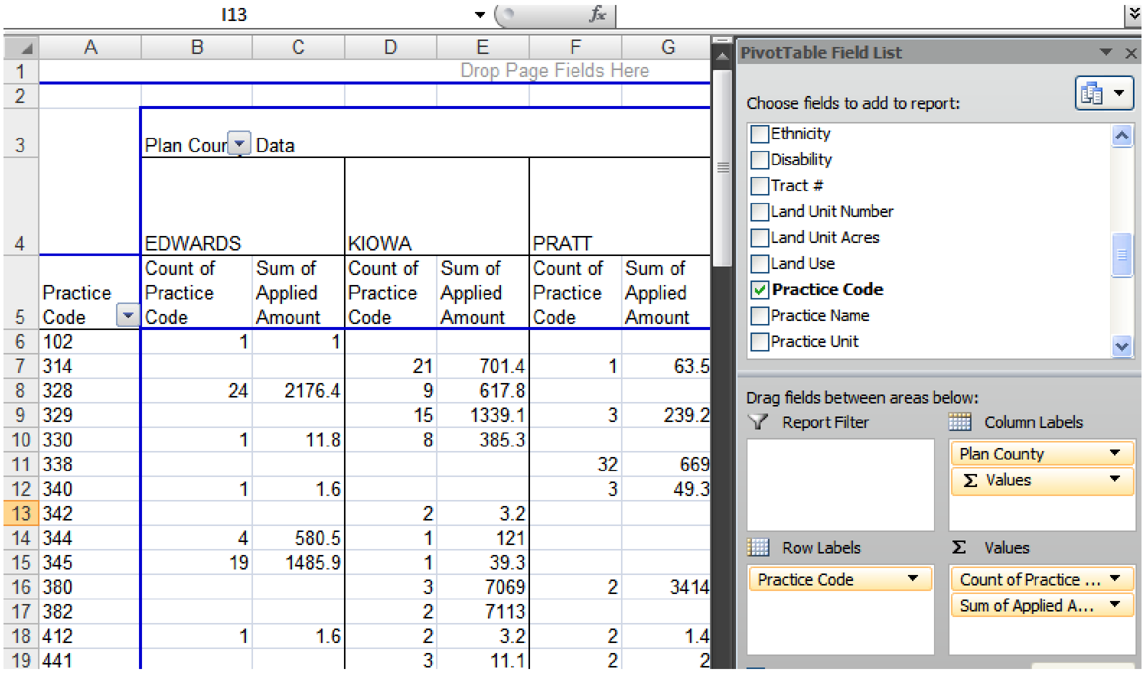
10. Press **<Ctrl> Home** to return to the top of the spreadsheet.
11. Save the spreadsheet.
Note: This report now includes all practices that have been applied and reported in the current FY by the counties in the MU.

<u>Create a Pivot Table to Show the Number of Practices by County</u>

1. Go to the Insert tab and click the **Pivot Table** button.



2. On the Create Pivot Table dialog, accept all defaults and click **OK**
Note: A new worksheet has just been created in the Excel workbook. Look in the lower left corner of Excel and there will be two worksheets named Practice Detail and Sheet1. Sheet1 is a blank Pivot Table.
3. On the right side of Excel, the Pivot Table Field List is available. To move information from the field list to the pivot table, click and hold on the field name and drag it to the appropriate window.
    a. In this report, the counties should be in the columns. Drag the Plan County field into the Column Labels area. The county names will appear in the pivot table to the left.
    b. The Practice Code should be in the rows. Drag the Practice Code field into the Row Labels area. The practice codes will appear in the pivot table to the left.
    c. The count of Practice Codes should to be in the Values, so drag the same Practice Code field into the Values area. The count of practice code will appear in the pivot table to the left.
    d. If a sum of practice applied amounts is needed in the report, drag the Applied Amount field into the Values area. The sum of practice applied amounts will appear in the pivot table to the left.
    Note: the report should look like the screen shot below.



	A	B	C	D	E	F	G
1					Drop Page Fields Here		
2							
3		Plan County	Data				
4		EDWARDS		KIOWA		PRATT	
5	Practice Code	Count of Practice Code	Sum of Applied Amount	Count of Practice Code	Sum of Applied Amount	Count of Practice Code	Sum of Applied Amount
6	102	1	1				
7	314			21	701.4	1	63.5
8	328	24	2176.4	9	617.8		
9	329			15	1339.1	3	239.2
10	330	1	11.8	8	385.3		
11	338					32	669
12	340	1	1.6			3	49.3
13	342			2	3.2		
14	344	4	580.5	1	121		
15	345	19	1485.9	1	39.3		
16	380			3	7069	2	3414
17	382			2	7113		
18	412	1	1.6	2	3.2	2	1.4
19	441			3	11.1	2	2