

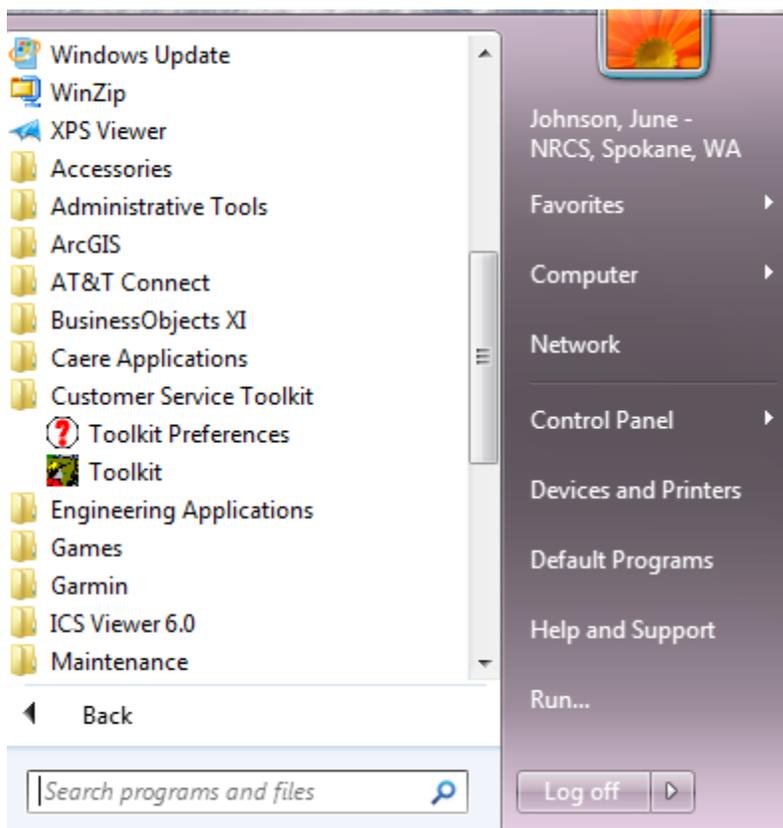
Helpful Hint—Set Preferences for Toolkit 6.0 and Customize ArcMap

Applies to Version:	Toolkit 6.0; ArcGIS 10.0
Written by:	June Johnson Washington NRCS Toolkit Coordinator
Helpful Hint Date:	Revised 02/13/2013

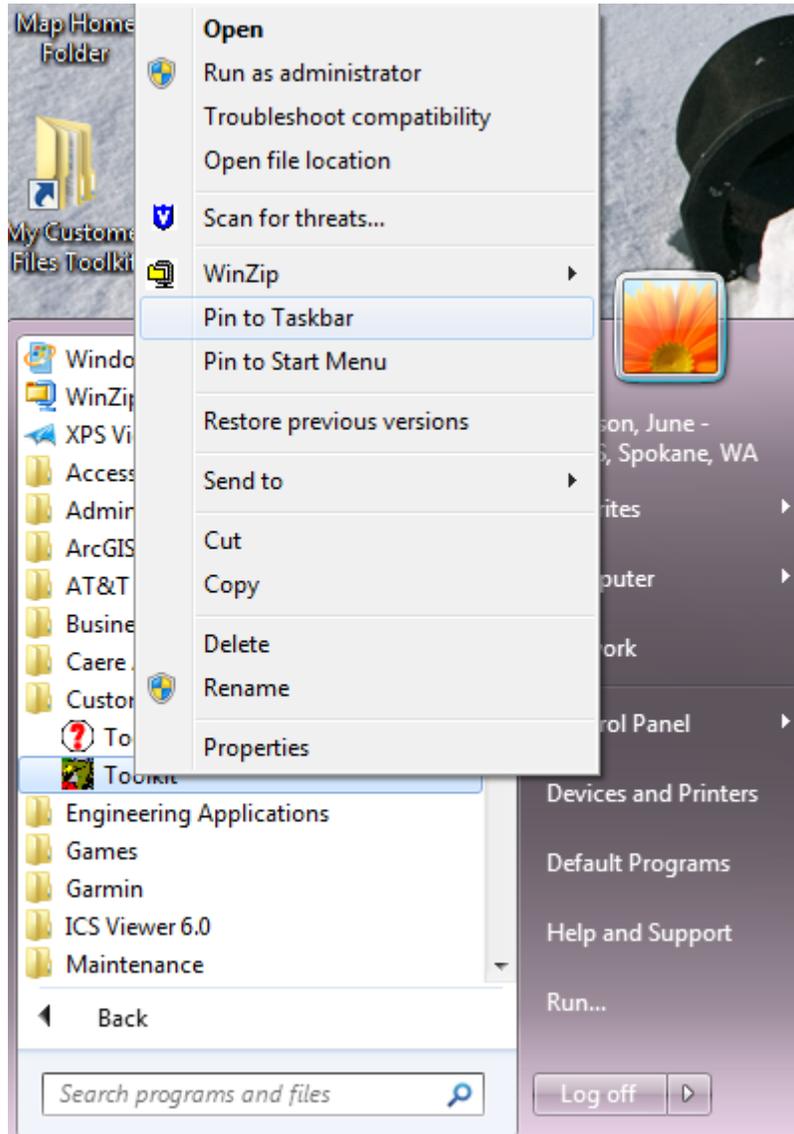
Background: After the conversion to Windows 7 and Toolkit 6.0 and ArcMap 10 have been installed, or when receiving a new computer, a user will need to perform the following steps to verify that Toolkit 6.0 has been installed correctly, to turn on the Toolkit Toolbar, the Soil Data Viewer Tools, and Customize ArcMap.

CREATE A SHORTCUT FOR THE TOOLKIT 6.0 PROGRAM

1. Go to **Start button**→**All Programs**→**Customer Service Toolkit**. Left mouse click on Customer Service Toolkit to expand it.



2. Select either **Pin to Taskbar** or **Pin to Start Menu**.

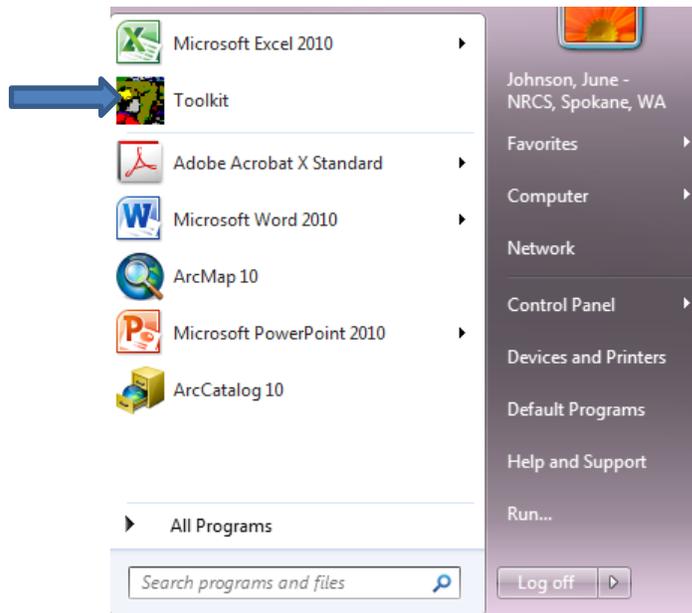


Choosing **Pin to Taskbar** will place a shortcut icon on the Taskbar.



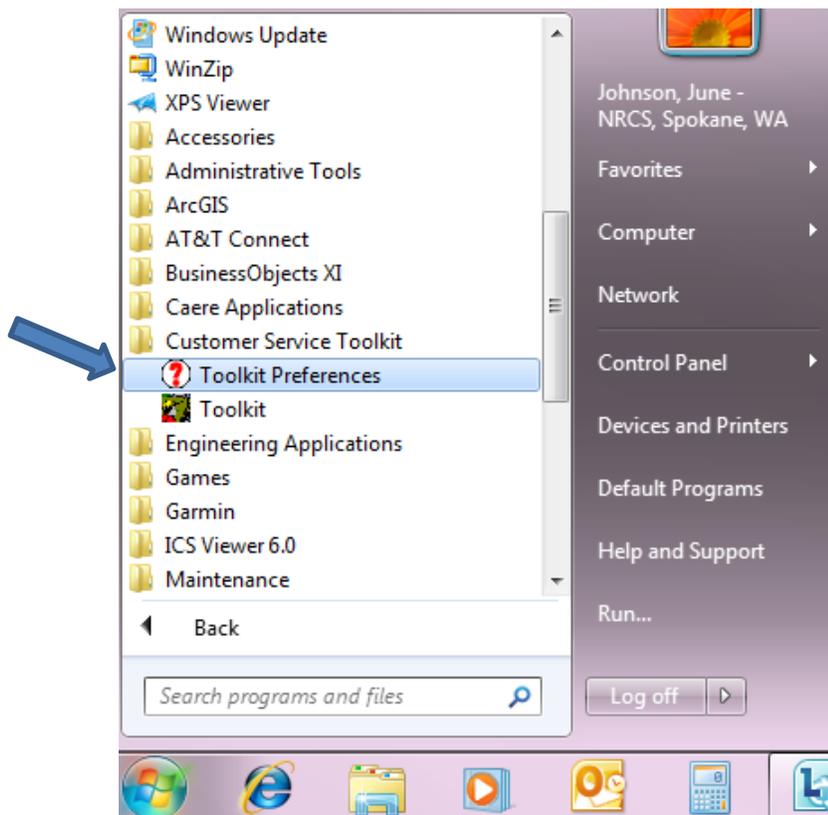
Note: There is no faint box outline around the Toolkit icon like there is for Word and Lync. This means that Toolkit is not open, but the Lync and Word programs are running.

Selecting Pin to Start Menu will make it available there.

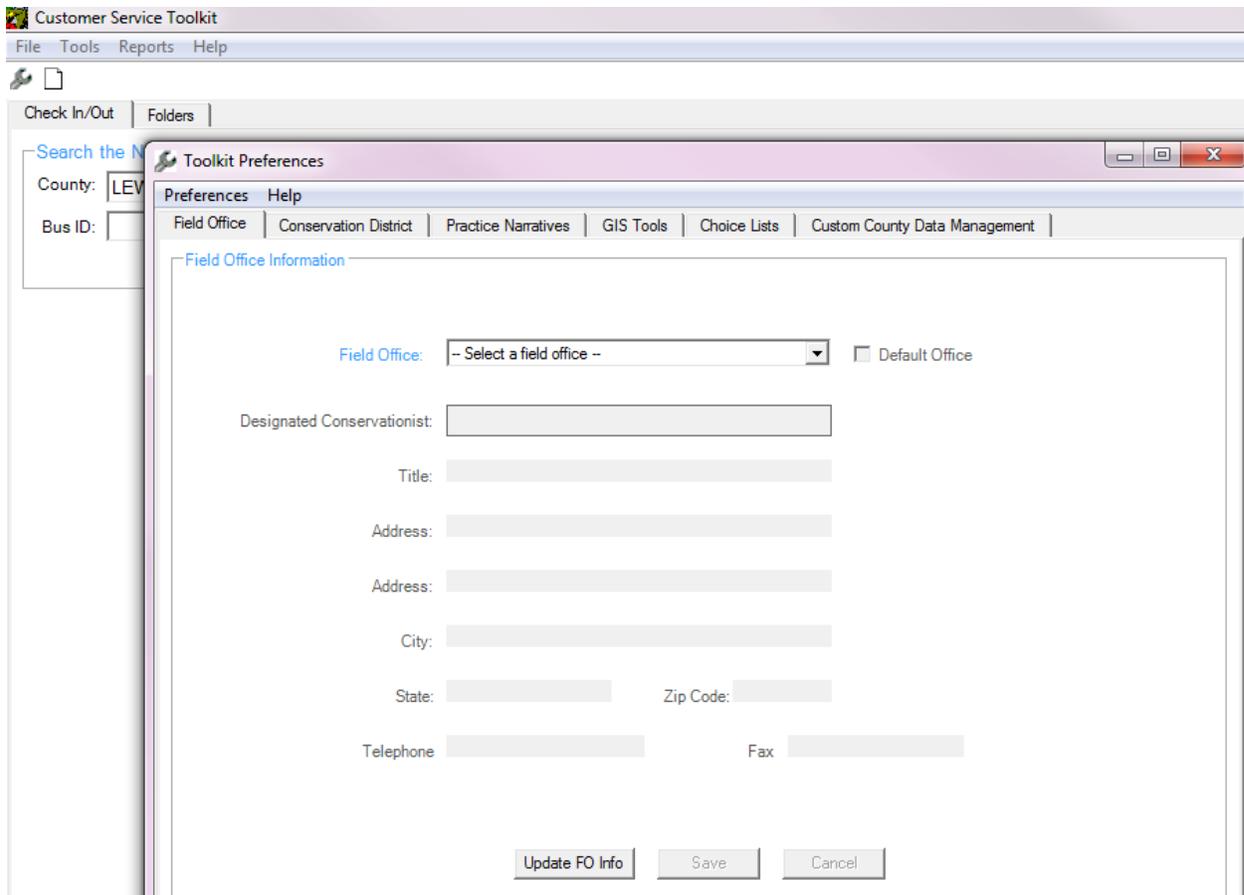


SET TOOLKIT PREFERENCES

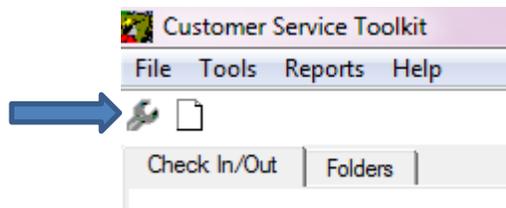
1. From the **Start button** → **Customer Service Toolkit** → **Toolkit Preferences**



This starts Toolkit with the Toolkit Preferences window open. This version of Toolkit is a bit slow to open, so be patient.



- Another way to access **Toolkit Preferences** is to **start Toolkit** (if prompted, go ahead and synchronize with the National Conservation Planning database) and click on the wrench, **Toolkit Preferences**, icon in the top left hand corner of the page.



3. Click on the **Update FO Info** shown at the bottom of the Field Office tab. (At this point, you probably will be prompted to eAuthenticate if you haven't done so already.) Select your home office and make it the default by checking the box. At this point, you may change the name of the Designated Conservationist only. You may not change the title or the address, phone number, etc. Push the Save button. (**NOTE:** If you have Toolkit permissions for more than 5 counties, set your counties first from the Custom County Data Management tab. Otherwise, your home office may not be available as a choice on the Field Office tab.)

The screenshot shows a web application window titled "Toolkit Preferences". The window has a menu bar with "Preferences" and "Help". Below the menu bar is a tabbed interface with the following tabs: "Field Office", "Conservation District", "Practice Narratives", "GIS Tools", "Choice Lists", and "Custom County Data Management". The "Field Office" tab is selected, and the content area is titled "Field Office Information".

The form contains the following fields and controls:

- Field Office:** A dropdown menu showing "CHEHALIS SERVICE CENTER" and a checked checkbox labeled "Default Office".
- Designated Conservationist:** A text input field containing "June Johnson".
- Title:** A text input field containing "District Conservationist".
- Address:** A text input field containing "1554 BISHOP RD".
- Address:** An empty text input field.
- City:** A text input field containing "CHEHALIS".
- State:** A text input field containing "WA".
- Zip Code:** A text input field containing "98532-8710".
- Telephone:** A text input field containing "(360)748-0084".
- Fax:** A text input field containing "(360)740-9745".

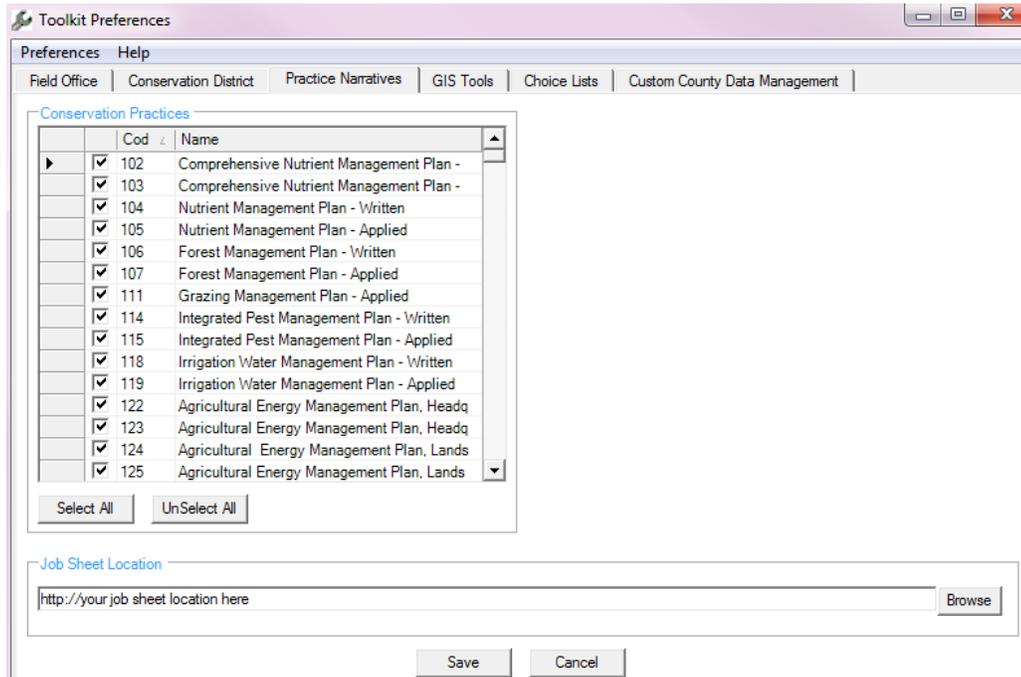
At the bottom of the form are three buttons: "Update FO Info", "Save", and "Cancel".

4. Select the Conservation District tab. Push the button Update CD Info and select your home Conservation District from the pull-down menu. Check the box to make it the Default District. Click Save.

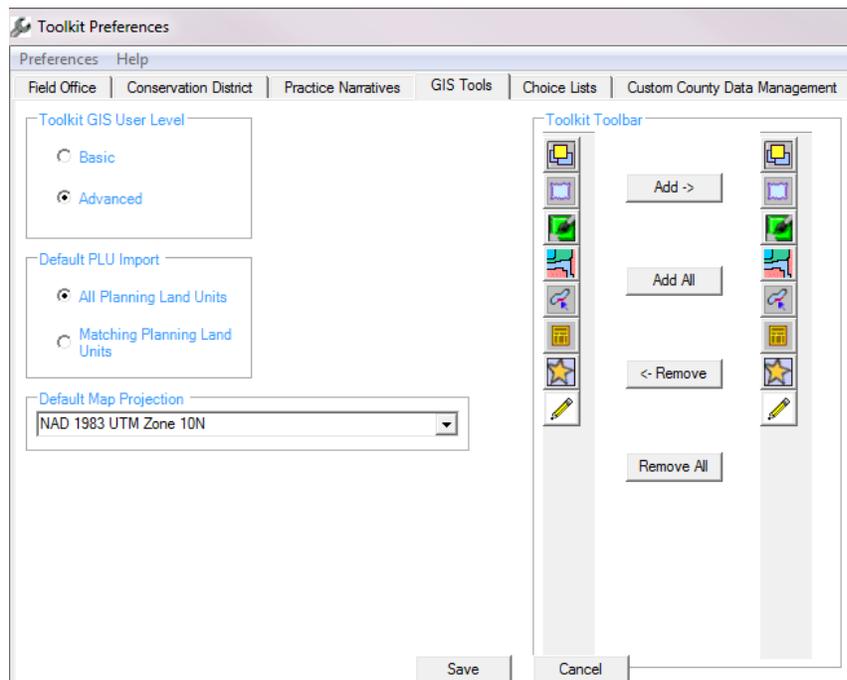
The screenshot shows the 'Conservation District Information' form in the 'Conservation District' tab. The 'Conservation District' dropdown menu is set to '- Select a district --'. The 'Default District' checkbox is unchecked. The form contains several empty text input fields for Address, City, State, Zip Code, Telephone, and Fax. At the bottom, there are three buttons: 'Update CD Info', 'Save', and 'Cancel'.

The screenshot shows the 'Conservation District Information' form with the following data entered: 'Conservation District' is 'LEWIS COUNTY CONSERVATION DISTRICT', 'Default District' is checked, 'Address' is '1554 BISHOP RD', 'City' is 'CHEHALIS', 'State' is 'WA', 'Zip Code' is '98532-8710', 'Telephone' is '3607480083 ext. 4', and 'Fax' is '(360)740-9745'. The 'Update CD Info', 'Save', and 'Cancel' buttons are visible at the bottom.

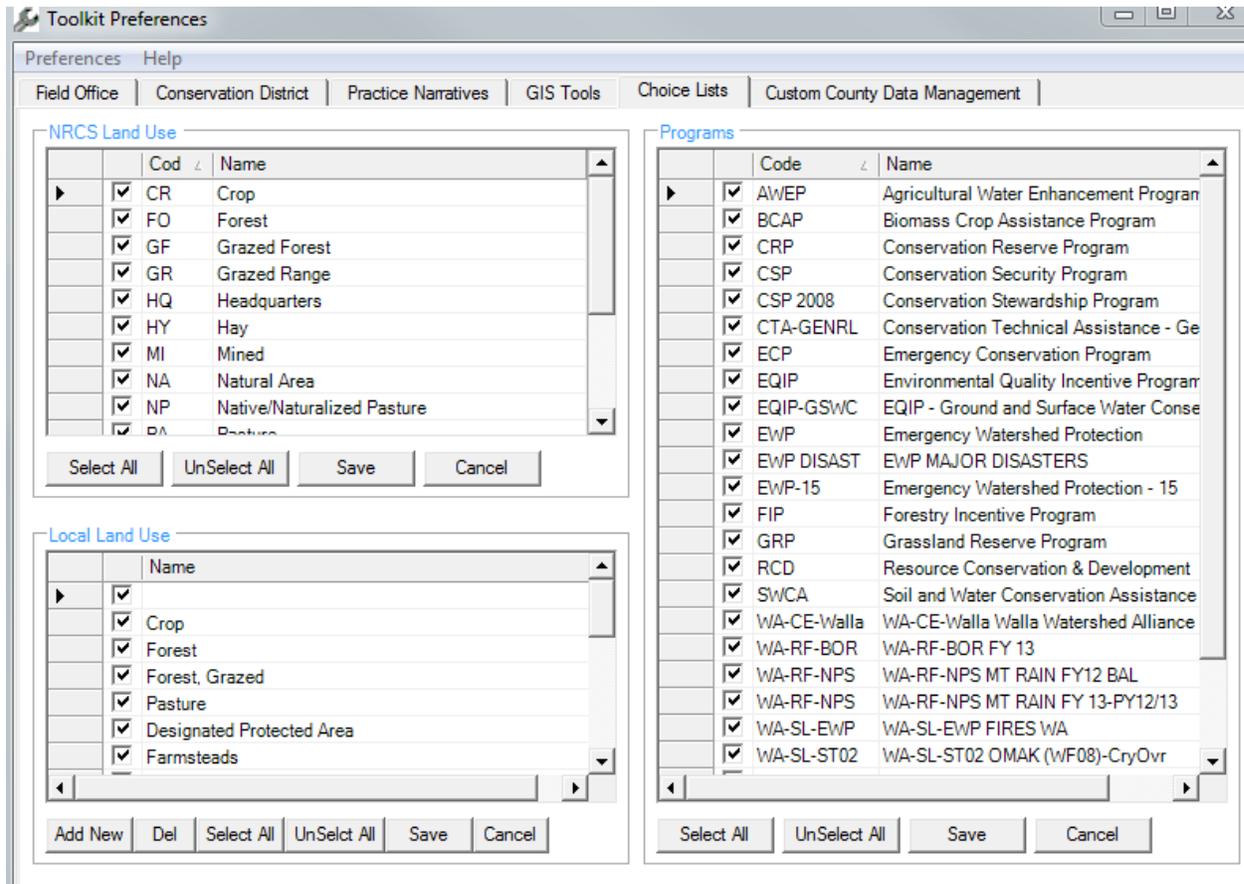
- On the **Practice Narratives** tab, if desired, uncheck the practices that are not commonly applied in your Team. Click on Save if changes are made.



- Select the **GIS Tools** Tab and pick **Advanced** GIS Toolkit User Level. Default PLU import of **All Planning Land Units**. Select the Coordinate system to either **NAD 1983 UTM Zone 10N or 11N** depending on your location. Keep the default selections for the Toolkit Toolbar. Click on **Save**.



- The **Choice Lists** tab has three different boxes.



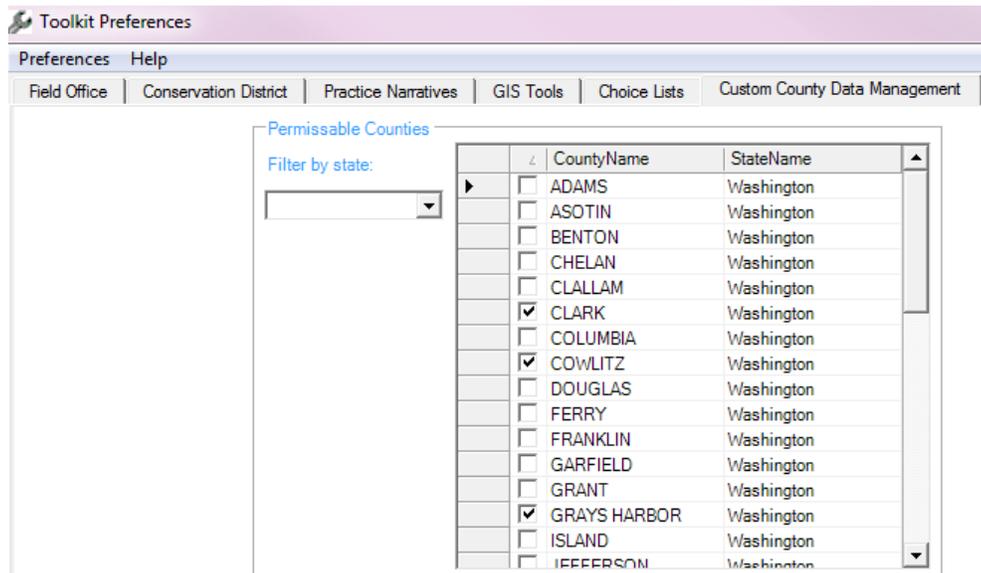
- Unselect the **Program** codes that are not used in your Team and click **Save**.
- Unselect **NRCS Land Uses** that are not used in your Team, if desired, and click **Save**.

10. Add **Local Land Uses** as desired. Be sure to leave the top one blank. In order to transition to the new CDSI Land Uses, you may add them as **Local Land Uses**:

Old NRCS Land Use	New CDSI Land Use
Crop	Crop
Pasture	Pasture
Pasture	Pasture, Grazed
Grazed Range	Range
Grazed Range	Range, Grazed
Grazed Range	Range, Wildlife
Forest	Forest
Forest	Forest, Wildlife
Grazed Forest	Forest, Grazed
Mined	Other Rural Land
	Associated Ag Land
Headquarters	Farmsteads
Urban	Developed Land
Natural Area	Designated Protected Area

In Toolkit, you will still be required to attribute a field using the NRCS Land Use, but you may create labels using only the Local Land Use.

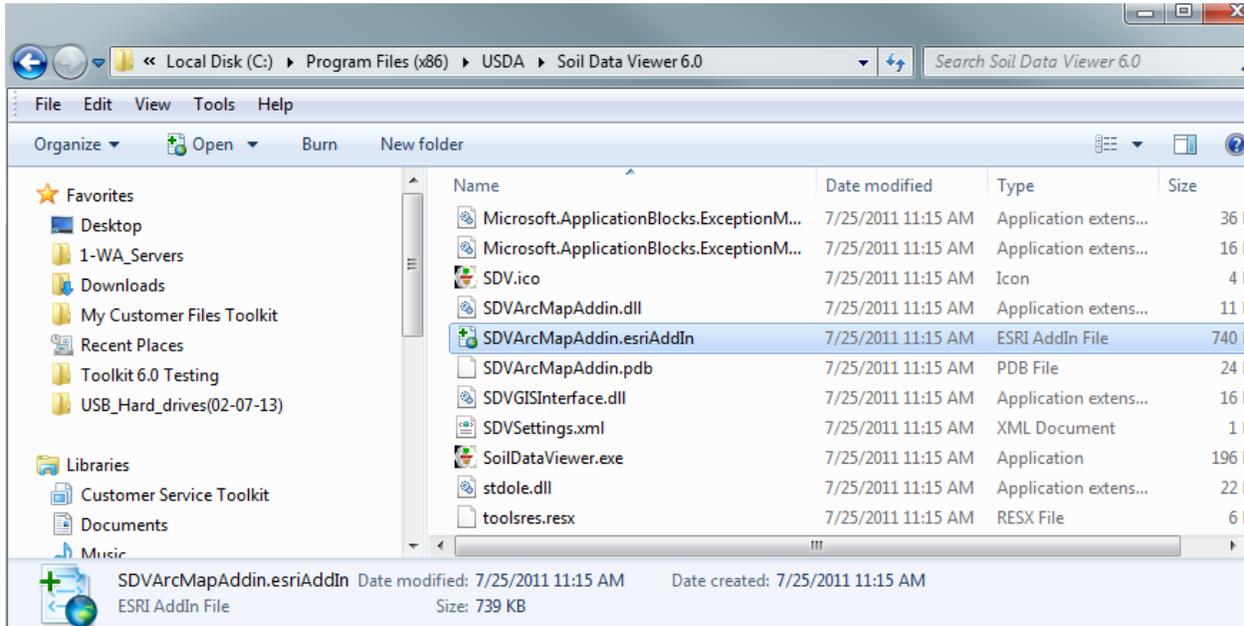
11. The **Custom County Data Management** tab will list all of the Counties where you have Toolkit Permissions. You may want to turn off all of the Counties except your home county. I recommend that you only have 4 or 5 counties turned on at a time. Be sure to click on Update/Save when making changes.



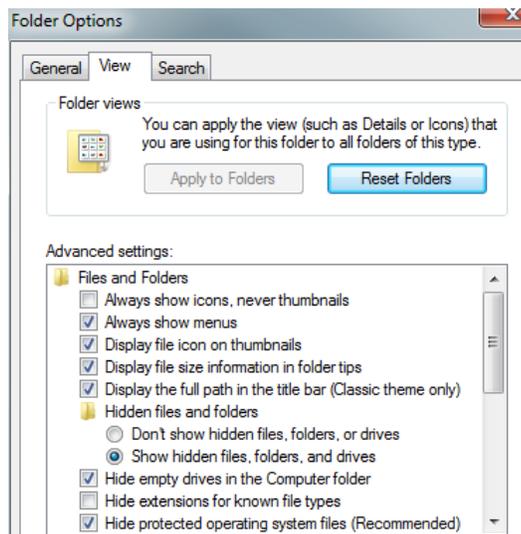
Register Soil Data Viewer 6.0 as an Add-In to ArcMap



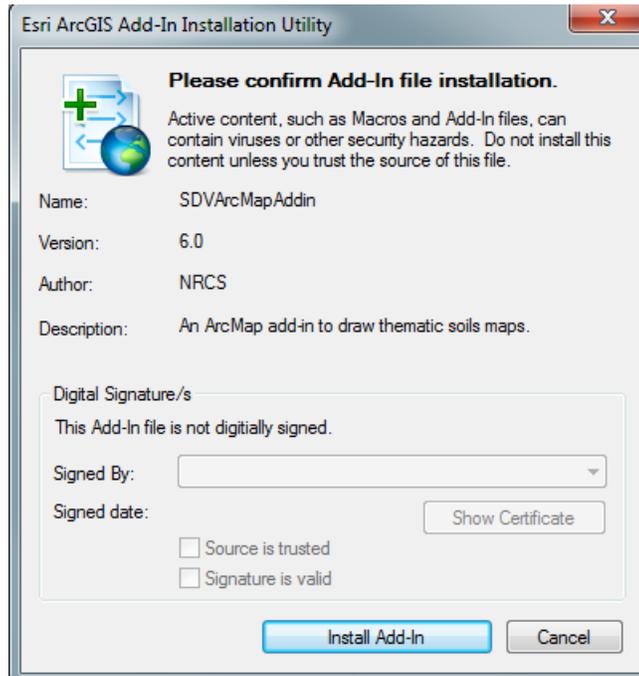
1. Go to Windows Explorer by clicking on the Windows Explorer icon found in the task bar at the bottom of the screen, or the Windows key plus the letter E.
2. Navigate to C:\Program Files (x86)\USDA\Soil Data Viewer 6.0
3. Double click on the file named **SDVArcMapAddin.esriAddin**.



- a. There are two files in this directory where the non-extension part of the name is **SDVArcMapAddin**, be sure to select the one with the **.esriAddin** extension. If the file name extensions are hidden, you will not be able to distinguish between the two.
- b. If needed, to display the file name extensions in Windows 7, click on the **Start** button and right mouse click on **Control Panel** and select **Open**. Pick **Appearance and Personalization** → **Folder Options**. Click on the **View** tab and clear the **Hide Extensions for known file types** check box.

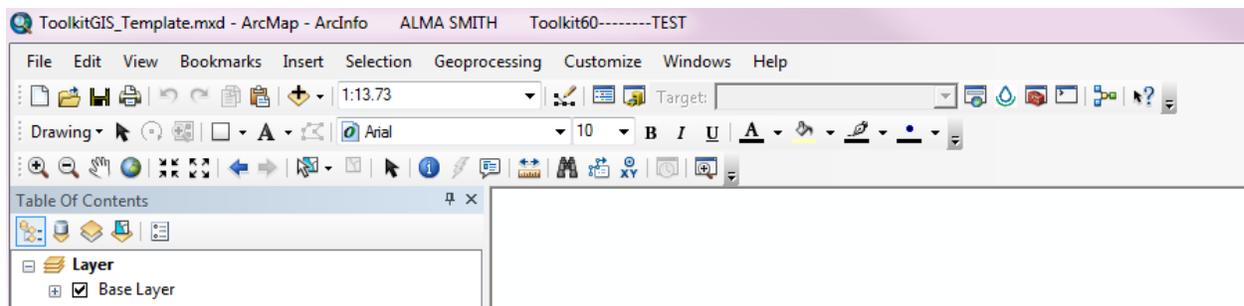
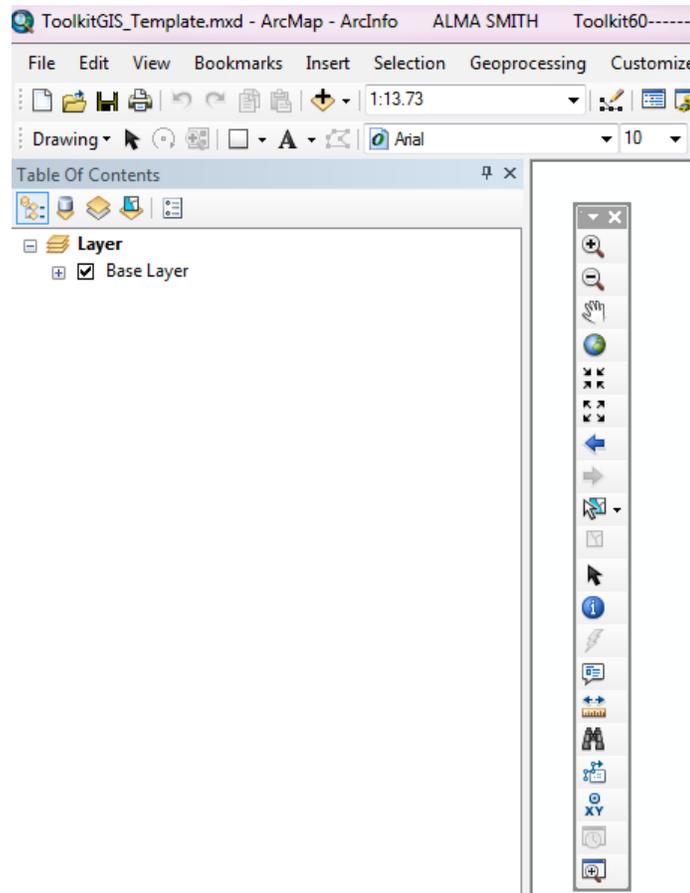


4. In the **ESRI ArcGIS Addin Utility** that comes up, click the button labeled **Install Add-In**.

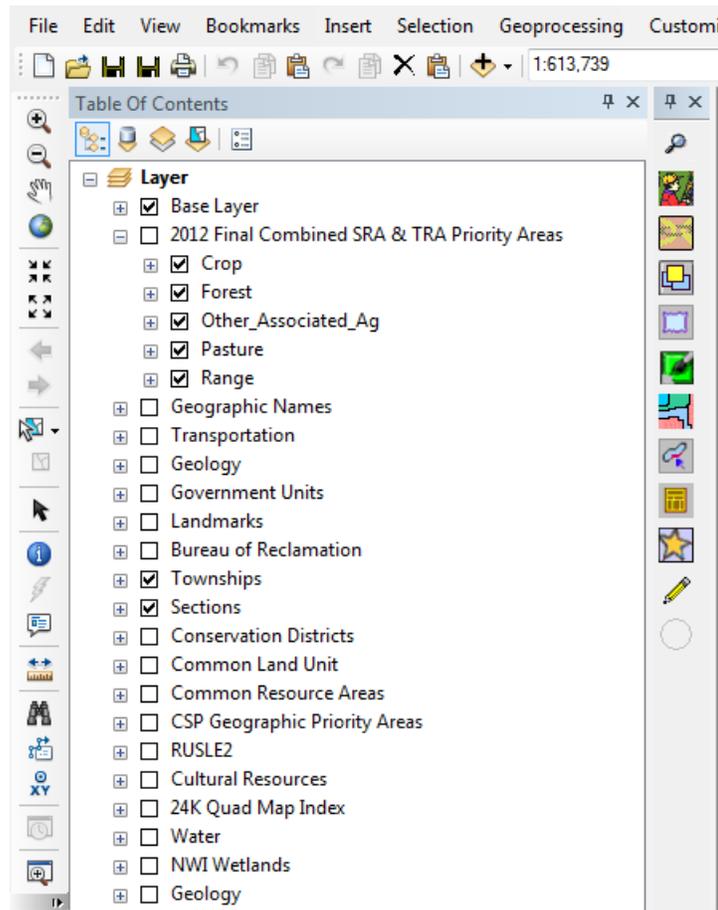


PREPARE ARCMAP 10 FOR USE IN TOOLKIT

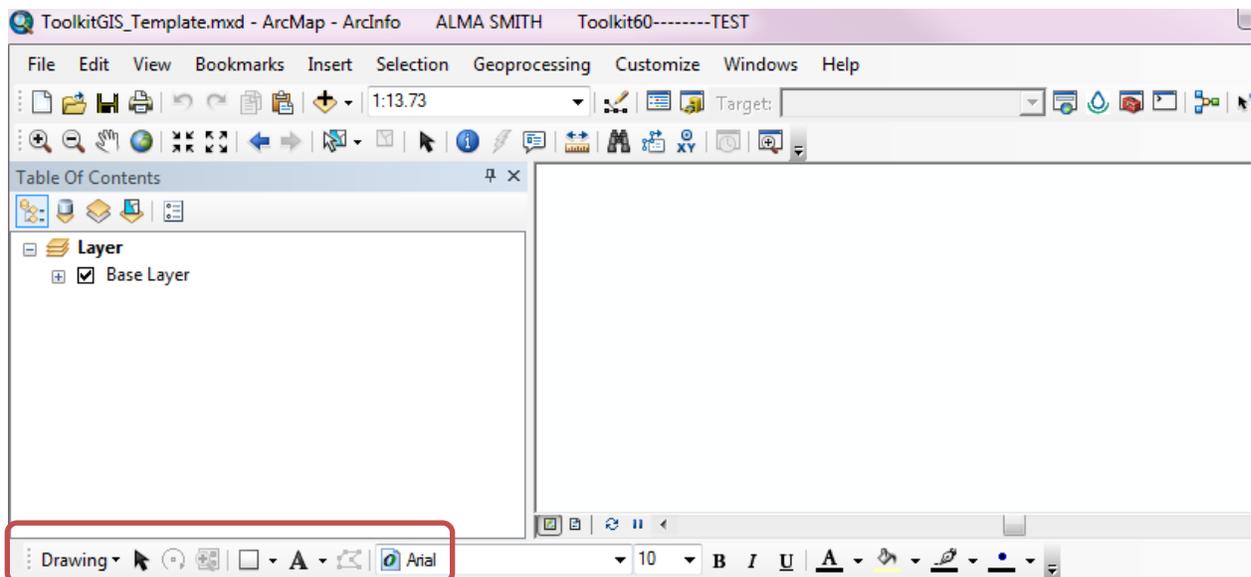
1. Check out a Toolkit Customer.
2. On the Customer File tab, highlight ArcGIS_Projects to open the folder.
3. Double click on the ToolkitGIS_Template.mxd to open a blank Toolkit template that has been designed to work with ArcGIS 10.
4. The ArcGIS Tools Toolbar will probably be floating. I have not been able to dock it in the middle of the screen, so I put it at the top of the ArcMap project.



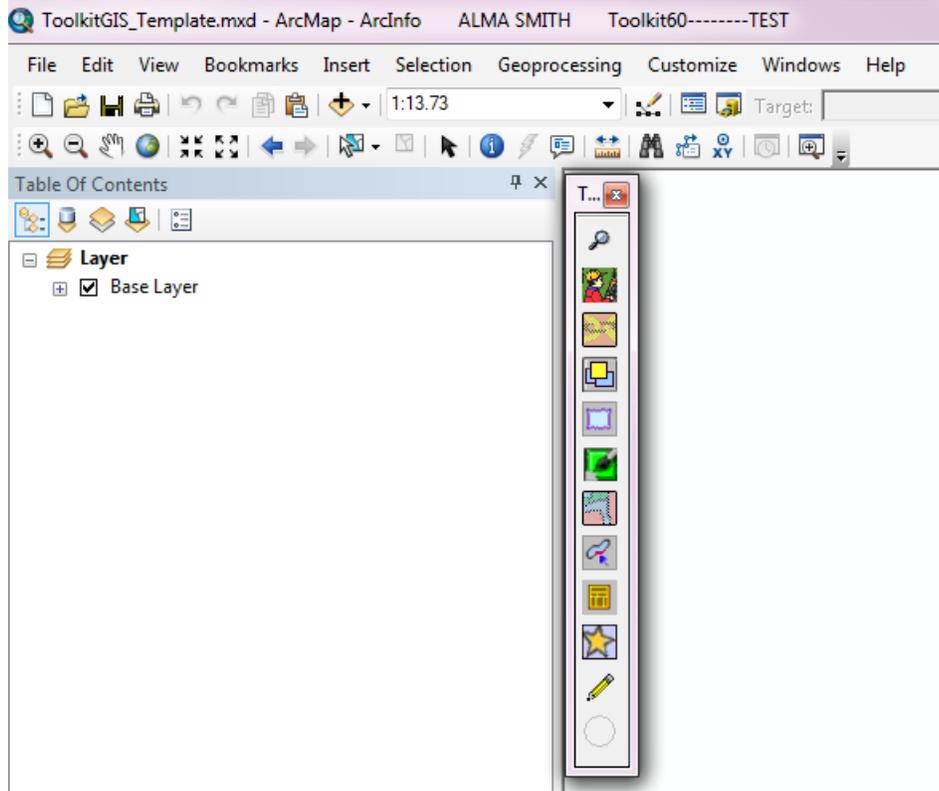
- Another option for the floating ArcGIS Toolbar is to dock it on the left side of the Table of Contents. It will, again, appear vertical.



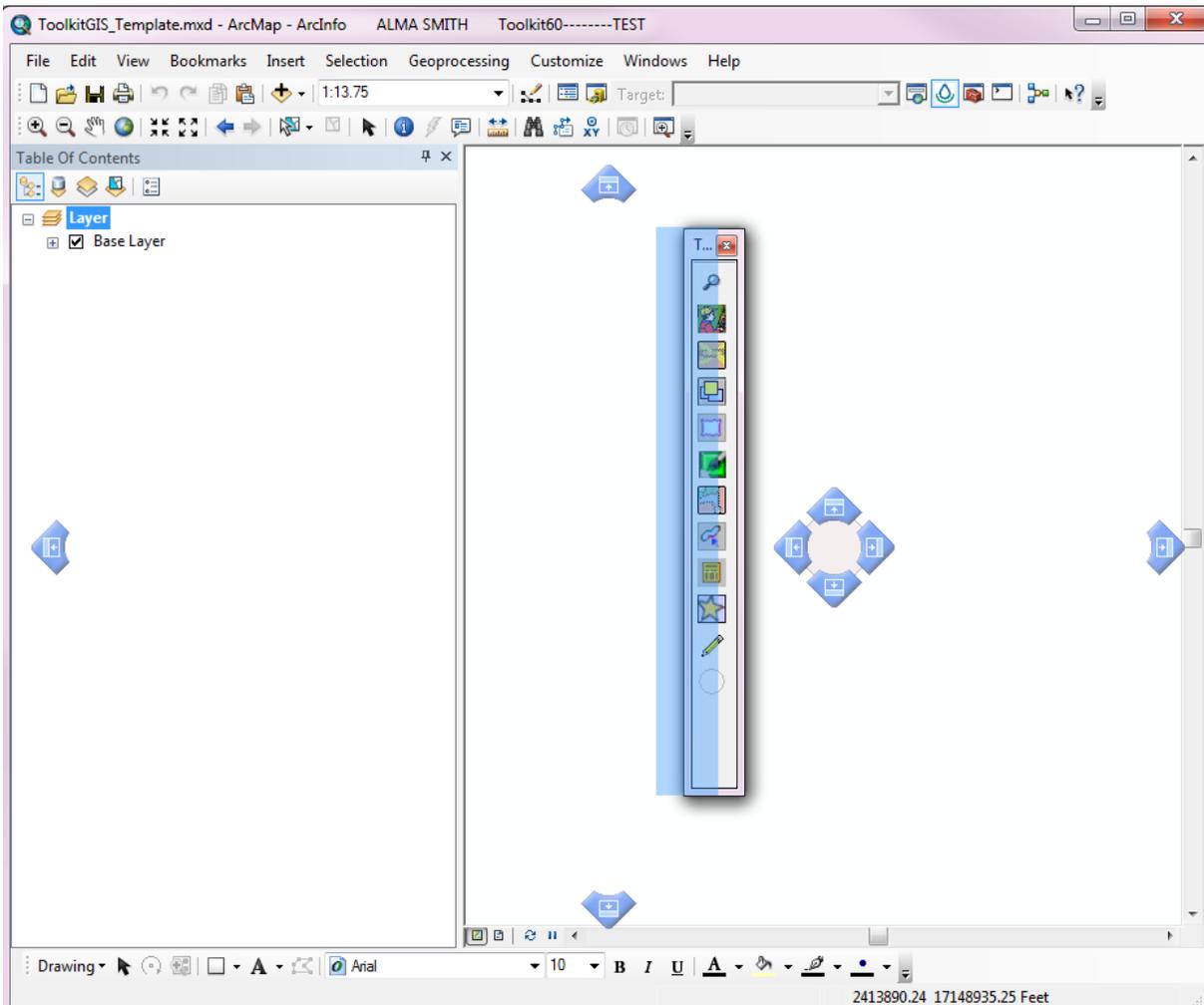
- The Drawing toolbar used to be at the bottom of the screen, so click on the dots to the left of the Toolbar and hold down the mouse button to undock it from the top of the screen and move it to the bottom.



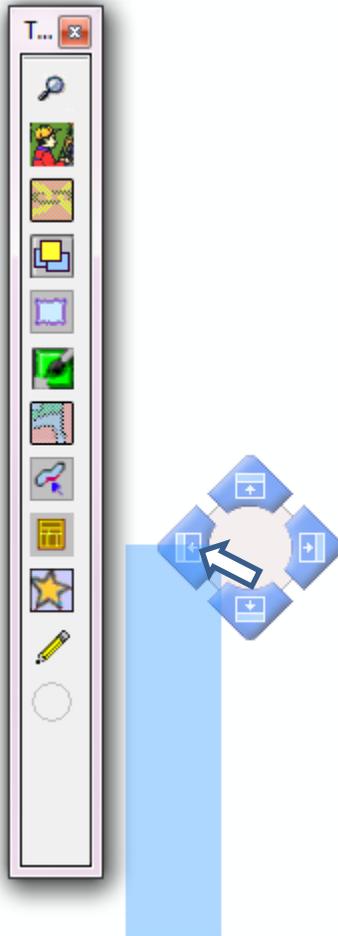
- Click on the NRCS icon to turn on the Toolkit Toolbar. It will be floating.



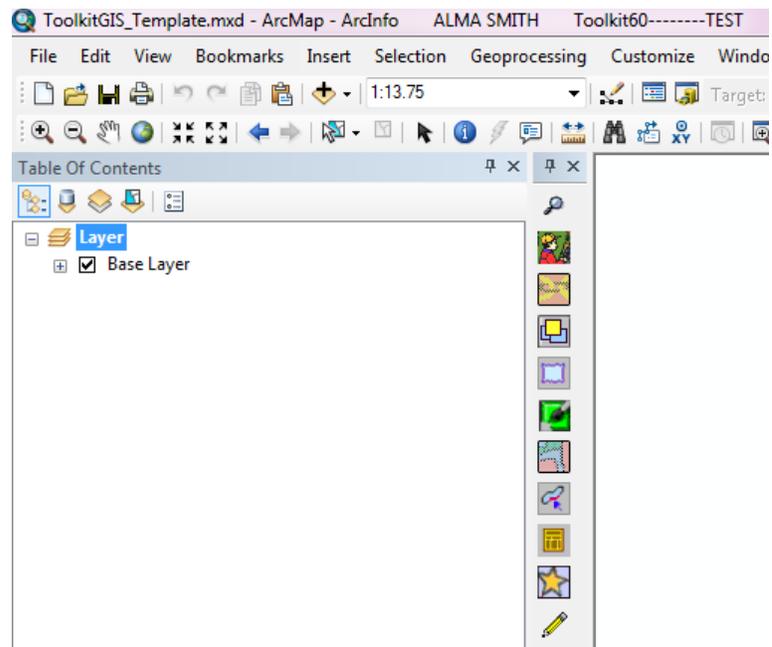
8. Hold down the left mouse button at the top of the Toolbar and move it slightly. Blue arrows will appear on the screen.



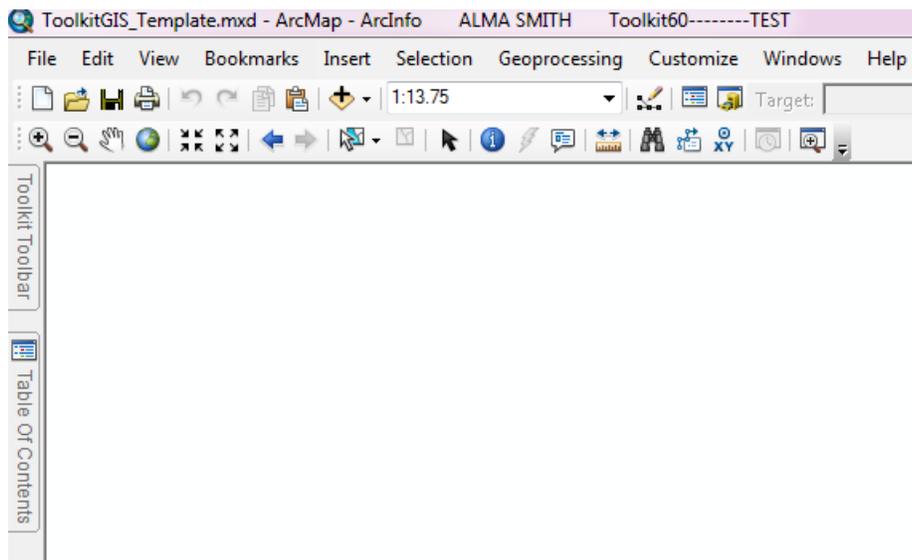
The images within the arrows are telling you where the Toolbar will be docked. Move the Toolbar over the one in the center square that is pointing to the left. The mouse needs to be over the blue triangle for the desired position, like this, then let go. It may take a while to get it right.



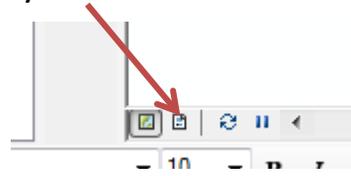
In this example, the Toolbar needs to be resized, so that the icons are vertical.



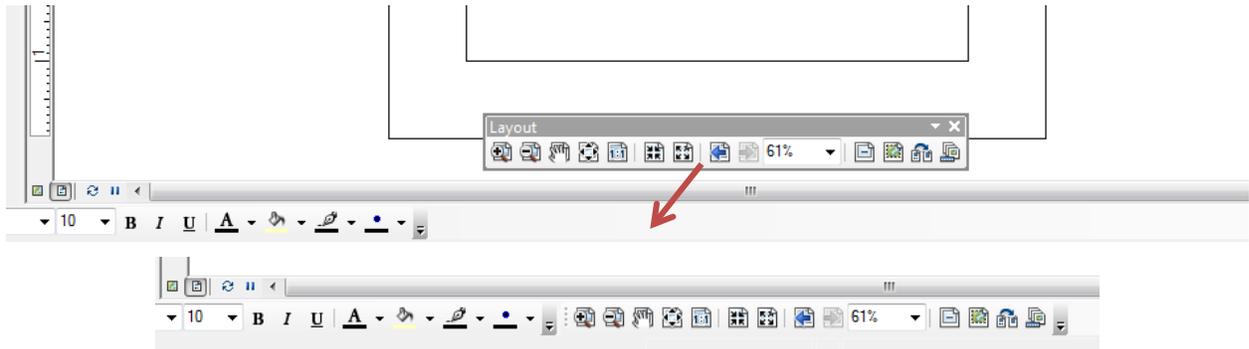
If you click on the little pin icon at the top of the Toolbar or the Table of Contents, they will auto-hide. This may be useful when editing.



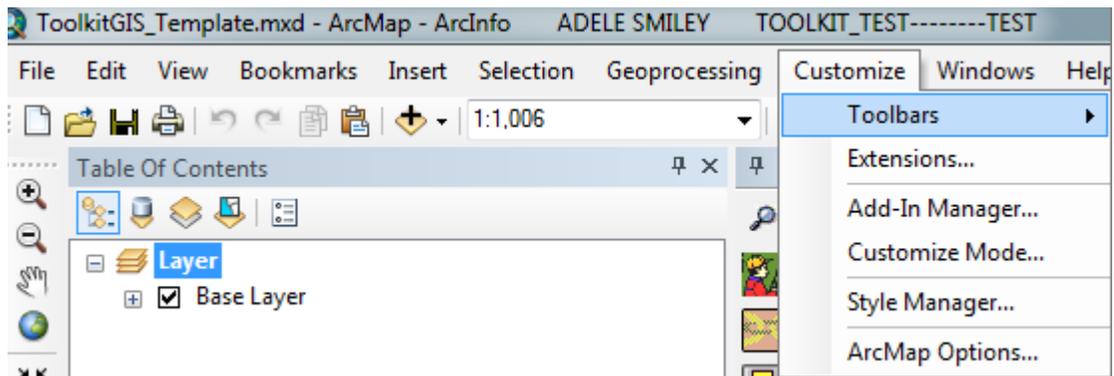
9. Click on **View**→**Layout** View or use the **layout icon** in the bottom left side of the map display.



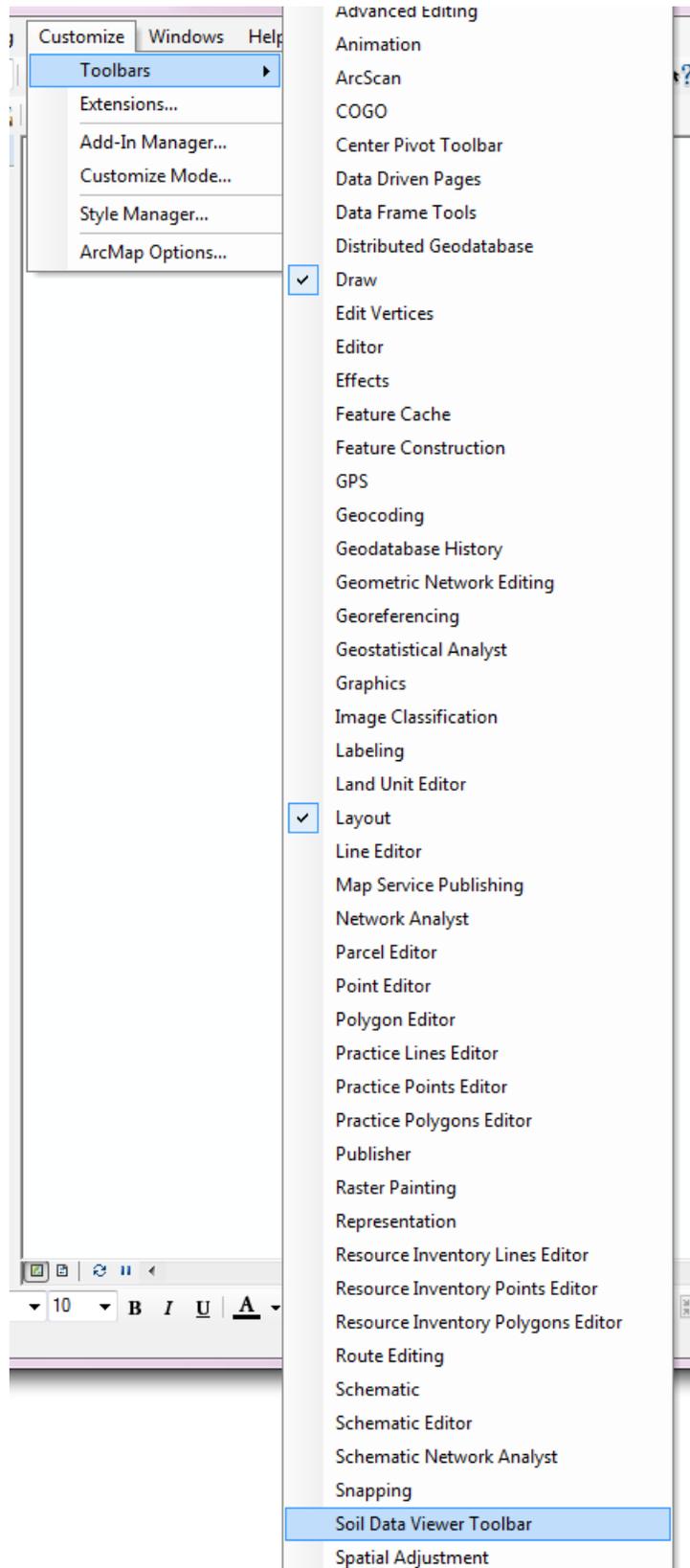
10. Dock the floating Layout Toolbar at the bottom of the page by holding down the left mouse button on it and dragging it down.



11. Switch back over to the data view: **View**→**Layout**, or click on the **Data View** icon at the bottom of the map display.
12. Turn on the **Soil Data Viewer** by clicking on the **Customize** menu at the top of the screen.
13. Select **Toolbars**.



14. Scroll down the list and turn on the **Soil Data Viewer Toolbar**.



15. The Soil Data Viewer icon  will be floating. Hold down the left mouse button over the gray part at the top of the icon and drag it up and place it at the end of the row near the Toolkit Toolbar icon.



16. All of these customizations will be saved by default in your Normal ArcMap template.
17. Exit the ArcMap project. There is no need to save the project.