Checking Out/In an Existing Customer

Toolkit 2004

When you start Toolkit 2004, a message asking if you want to synchronize with the NCPDB appears. Click yes.
You will have to authenticate through WEBCAAF. Click Continue.

Enter your WebCAAF credentials.
You are now authenticated, choose your county and click Go. (You may enter the other optional information to narrow your search.)

All the customer folders in the NCPDB appear on the left and all customer folders on your workstation appear on the right.
Click on the customer that you wish to check out to select the customer folder. Click the Check Out button.

The customer folder is checked out to the local workstation. Notice the copy on the NCPDB is locked and can only be checked out as read-only by other users. The write copy is now present on your workstation. Click on the Folders tab.
The Folders tab shows only the customer folders present on your workstation. Click the customer folder to select it.

Click the Open Folder icon.
The customer folder is opened on the General tab. (This data is not editable from within Toolkit 2004, Edits must be made in SCIMS) Click on the Assistance Notes tab.

There are no assistance notes for this customer, click the Land Units tab.
On the Land Units tab, Click the drop down button by Select a Plan and click the plan name to select the plan.

The land units for the customer appear. Note the land units show as unmapped. The land units will show as unmapped whether or not they were mapped with ArcView in the previous version of Toolkit. They will need to be linked to the map in ArcGIS later. Click on the Practice Schedule tab.
Select the plan by clicking the drop down button in the plan field. The current practice schedule appears. Click the Customer Files tab.

All customer files in the Customer’s folder were preserved from the previous version of Toolkit, including the old ArcView project files.
Once you are through editing the customer folder it needs to be checked back in to the NCPDB. Click the lower X in the upper right corner of the window. (The upper X closes Toolkit)

Click the Check In/Out tab.
Click the customer folder on the right to select it, then click the Check In button.

The customer folder is transferred back to the NCPDB. Notice the folder is now free to be checked out by other users.