

Toolkit 5.0 Instructions (Maryland, ver.1)

Using Online Help.....	1
Summary of Steps	2
Creating a County Template.....	3
Creating a Shortcut.....	3
Setting Preferences.....	4
Start Toolkit	6
Check Out a Customer	6
Rollover Existing Customer Folder into Toolkit 5.0.....	7
Creating Map Labels	8
Creating a Soils Map and Soils Inventory	10
Modifying the Map Layout	12
Setting the Map Layout Scale	12
Editing the Map Layout Legend.....	13
Printing the Map Layout.....	13
Appendix A – ArcGIS Basics	15
Appendix B – Symbology	19
Appendix C – Defining Projections	21
Appendix D – Using Conservation System Guides	21

The First Time You Use Toolkit...

- Set up the C:Geodata folder with frequently used GIS data for Toolkit projects
- Create or copy the customized County_Template.mxd file onto C:ProgramFiles/USDA/Toolkit5/Templates
- Set up Toolkit User Preferences
- Save a Toolkit Shortcut to the desktop

Using Online Help

- From Customer Service Toolkit, click on **Help>Contents**, or
- Click on the link: <http://cst.sc.egov.usda.gov/Toolkit/Help/>
- Click the **Search** button
- Type your subject, and click the **Enter** key

Summary of Steps

1. Start Toolkit
2. Check Out a Customer Folder
3. Open the Customer Folder, select the **Customer Files** tab, and open the **ArcGIS_Projects** folder
4. Double click on the plan_name.mxd or the County_Template.mxd
5. If you opened the county template, select **File>Save As**, and name your new map project.
6. Click on the **Add Plan** button (cyber Farmer) on the Toolkit Toolbar
7. Create (star icon), Link (chain icon) or Edit (pencil icon) your Digital Planned Land Units (consplan) Layer
8. Attribute your consplan layer, using the **Attribute** button (calculator/Waffle)
9. Label your consplan layer, using the **Map Labels** button (paint brush)
10. Create a Soils Map and Soils Inventory using the **Soil Map/Inventory** button (polygons/modern art)
11. The Soils Inventory is saved to the Customer Folder/Resource Maps folder
12. Add symbology to the soils map layer, or uncheck the layer to turn it off
13. Create (star icon) or Edit (pencil icon) a **practice layer**
14. Attribute the **planned practices**, using the Attribute button (calculator/waffle)
15. **Symbolize** your planned practices (Right click on layer>Properties>Symbology>Categories)
16. Click on the **Map Products** button (light blue flag/rectangle) to create the Map Layout
17. Select **Layout and Scale** tab to assign the map scale
18. Manipulate the Map Layout using the **Layout Toolbar** at the bottom of the ArcGIS interface
19. Go to **File>Print Preview** before saving or printing the map layout
20. Save the map layout by clicking on the **Adobe Acrobat** button in the Toolkit Toolbar (saves to the Customer Folder/ Resource Maps folder)
21. When your work is complete, **save your work**
22. Close ArcMap, then close the Customer Folder
23. **Check In** the Customer Folder to save your changes to the National Conservation Planning Database

Creating a Customized County Template

1. First, customize the **C:Geodata** directory
2. Copy frequently used data from the **F:Geodata** into **C:Geodata**
3. Reproduce the directory structure and folder names for the data you include in C:Geodata (ex. topographic_images, ortho_images, soils, transportation, government_units)
4. **Open ArcMap** from the Desktop
5. Click on **Start>All Programs>ArcGIS>ArcMap**
6. In the pop up window, “Start Using ArcMap with”, choose “**An Existing Map**”
7. Click the **Browse** button (yellow folder icon) to browse to the **ToolkitGIS_Template.mxd** (C:ProgramFiles>USDA>Toolkit5>Templates)
8. When the Template comes up, Click on **File>Save As**
9. Enter a new name for the County_Template.mxd, and browse to save the new template under C:ProgramFiles>USDA>Toolkit5>Templates
10. Now you can add data to your template, click the **Add Data** icon (plus sign)
11. **Browse** to the layer you want to add, and click once to highlight the layer
12. Click the **Add** button
13. To **Rename** a layer, right click on the layer name
14. Select **Properties**, click the **General** tab, and type in a new layer name
15. Click **OK** to close the layer **Properties** window
16. When you are finished adding data to your template, click **File>Save**, then close out of ArcMap

Create a Shortcut

1. Click on **Start > All Programs > Customer Service Toolkit**
2. Right Click on **Toolkit 2004**
3. Choose **Send To > Desktop**
4. Click away – your shortcut should appear on the desktop

Setting Preferences

(Preferences must be set for each toolkit user on each workstation the person uses toolkit. **Important! Make sure your GIS Preferences are set correctly!**)

- Click on the **Wrench** icon in the Toolkit Toolbar, **or** from the desktop, click on **Start>All Programs>Customer Service Toolkit>Toolkit Preferences 2004**
- Set preferences using the six (6) Preference Tabs across the top of the screen

1. Field Office Tab

- If the text fields are **not** prepopulated, click on the **Update FO Info** button.
- A message is displayed that your field office preferences will be overwritten, click **Yes** to overwrite the data.
- If needed, enter your eAuthentication **User ID** and **Password**, then click **Login**.
- If you have one Field Office, it is prepopulated in the text field. If you have more than one Field Office, you must select one from the **Field Office** drop-down list.
- Click the **Default office** checkbox to use the selected field office as your default setting when creating plan and contract documents.
- Click **Save** to save your changes, or click **Cancel** to retain your original settings.
- Click **OK**.

2. Conservation District Tab

- If the text fields are **not** prepopulated, click **Update CD Info**.
- A message is displayed that your district preferences will be overwritten, click **Yes** to overwrite the data.
- If needed, enter your eAuthentication **User ID** and **Password**, then click **Login**.
- If you have one conservation district, it is prepopulated in the text field. If you have more than one conservation district, you must select one from the **Conservation District** drop-down list.
- Click **Default district** checkbox to set the selection as your default conservation district when creating plan documents.
- Click **Save** to save your changes or click **Cancel** to retain your original settings.
- Click **OK**.

3. Practice Narratives Tab

- As needed, edit **Conservation Practices** using the check boxes to the left of each practice code.
- The default is for all conservation practices to be selected.

- Enter the URL or path for your **Job Sheet Location** or click the **Browse** button (yellow folder icon) to locate the job sheets (Maryland Jobsheets are located in the directory: **F:\FOTG\Section_IV\MD Conservation Tools**).
- Click **Save** to save your changes, or click **Cancel** to retain your original settings.
- Click **OK**.

4. GIS Tools Tab

- The **Toolkit GIS User Level** should be left at the **Basic** setting (Changing the setting to Advanced will remove the Customized Toolkit Toolbar).
- The **Default PLU Import** setting should be set to **All Planned Land Units**.
- Set the **Default Map Projection** to **NAD 1983 UTM Zone 18N** (or Zone 17N for Western Maryland).
- Click **Save**.
- Click **OK** to save your changes.

5. Choice Lists Tab

- As needed, edit the **NRCS Land Use** codes (For example, check only the codes that apply to your area or unselect a code by unchecking the check mark next to the code).
- When finished editing, click **Save**.
- Click **OK** to the message to save your changes.
- As needed, add **Local Land Use** codes.
- Click the **Add New** button to add a new local land use.
- Enter the name of the new local land use.
- When finished editing, click **Save**.
- You may use the check boxes to choose which local land uses are available in Toolkit.
- As needed, edit the **Program Codes**
- Unselect a code by selecting the checkmark next to the code.
- When finished editing, click **Save**.

6. Custom County Data Management Tab

- If you want to update the counties that you have access to, modify your selection by placing checkmarks in the boxes preceding the counties you want access to.
- Click on the **Update/Save** button.

- Click **OK**.
- To refresh your Custom County Data Management preferences, you must close **Toolkit**.
- Your new settings will be implemented after restarting Toolkit 2004.

Start Toolkit and eAuthenticate

1. Double Click on the **Toolkit 2004 shortcut**
2. A window appears “Domain data was last synchronized...” Choose **Yes**
3. USDA eAuthentication window appears. Choose **Continue**.
4. Enter your eAuthentication User ID and Password, then click **Login**
5. You **do not** need to eAuthenticate to work on a Customer Folder that has already been checked out. When you check the folder in, you will be asked to eAuthenticate again.

Check Out a Customer Folder

1. Click on the **Go** button to bring up the entire list of Customer Folders
2. To Search for a folder by **Customer Name**, type in part of the name in, then click **Go**
3. To make a New Search, click on the **Clear** button
4. To Search for a folder by **Tract**, type in the number only, then click on **Go**
5. To Check Out the folder, click on the folder name, so that it is highlighted
6. Click on the Check Out button

Rollover Existing Customer Folder into New Toolkit 5.0

Start Toolkit and Check Out Customer Folder

- Start Toolkit
- Click on the **Go** button to bring up the entire list of Customer Folders
- Enter your eAuthentication User ID and Password, then click **Login**
- To Check Out the folder, click on the folder name, so that it is highlighted
- Click on the **Check Out** button

Open the Customer Folder and Open ArcMap

- Double click on the checked out customer to open the folder
- Select the **Customer Files** tab
- Select the ArcGIS_Projects folder.
- Double click the County_Template.mxd customized for your county (If the county template is not listed, click on the **Change/Add ArcGIS Template** button on the lower left side of the view. A pop-up window comes up “Default Template already exists. Do you want to overwrite the default template?” Click **No**. Double click the county template).
- When ArcMap opens, save the map product with a new name.
- Click on File>Save As. Accept the default name “new_plan,” or type in a name. Click the **Save** button.

Add the Digitized Planned Land Units to the Data View

- Click the **Add Plan** button (Cyber Farmer) on the toolkit toolbar.
- Select the plan and click **OK**
- A pop-up window comes up “No Plan shapes were found...”
- Click **OK**
- Click the Import Legacy Shapefiles button (chain link button) on the toolkit toolbar.
- The Import Legacy Shapefiles window pops up
- Click the browse icon (yellow file folder)
- Click the **consplan.shp**, then click the **Select** button
- The **All Planning Land Units** box should be checked
- Click **OK**
- The Legacy Spatial Import Report pops up. Click **OK**
- Click **File > Save**


Create Map Labels

1. Click the **Map Labels** (Paint brush) tool on the Toolkit toolbar.
2. Select the **Layer** you wish to label from the drop-down list.
3. For **Label Style**, accept the default style **Text** or click the drop-down list to select **Bullet Leader** or **Callout** from the list.
4. Click the **Scale Labels** check box to resize labels automatically when the view is zoomed in or out.
5. Click the check boxes preceding the attribute fields to include up to **five** attributes in the label.
6. Under **Field**, click the drop-down list to select the **Land Unit Number** attribute for the first line of the label.
7. Under **Text**, type “Field”. This text will precede the attribute in the label.
8. Now select the **Land Unit Acres** attribute for the second line of the label.
9. Select **Units** to specify acres (ac).
10. Under **Decimals**, click the drop-down list to select the number of 1 decimal point.
11. Once the labels have been set up, save the preferences for future use by selecting **Save User Preferences** (When you use the Map Labels button in the future, use the **User Preference** button to retrieve your label preferences).
12. When you are finished setting up the labels, click **OK**.
13. You have just created an annotation layer.
14. Enter a name for the annotation layer in the box, click **OK**.


Turn Off the Annotation Layer

1. Hold the cursor over the **Layer** (Data Frame name), right-click and select **Properties**.
 - The Data Frame Properties dialog window is displayed
 - Under the **Annotation Group** tab, a list of available annotation layers is displayed.
2. To turn the **Consplan Labels** off, uncheck the annotation layer check box.
3. Click **OK** to close the dialog window.

Edit Labels




1. To edit the font size, style, or color of a label, use the **Select** icon  from the Drawing toolbar located at the bottom of the ArcGIS interface

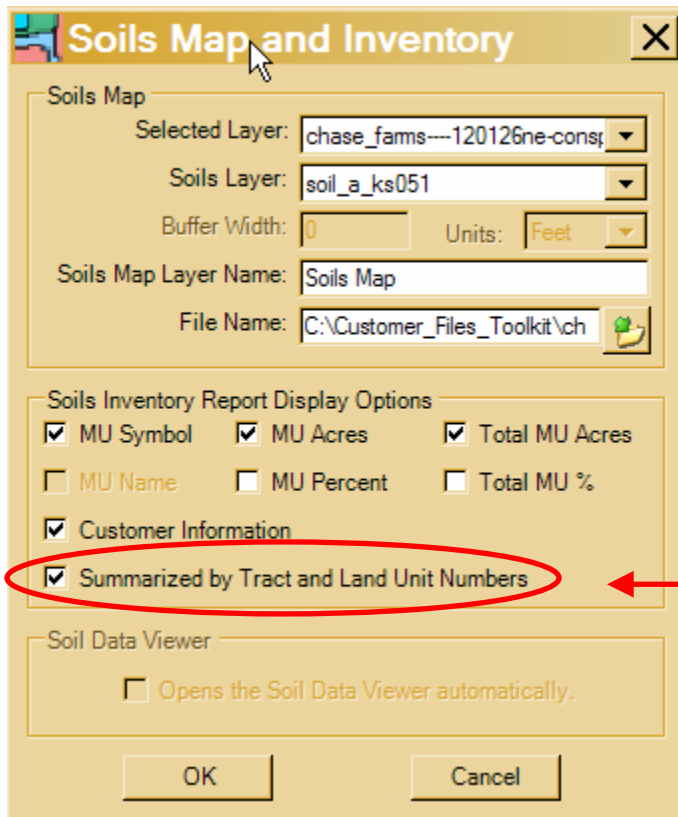
Soils Map/Inventory Tool

The **Soils Map/Inventory** tool  on the Toolkit toolbar works only when a soils theme and a land unit layer are added to the view. You can use the **Soils Map/Inventory** tool to:

- Produce a customized soils map and legend for the customer.
- View an inventory of soils for a specific field(s).

Create a Soils Map

1. To create a Soils Map layer for all the land units in the land units layer, clear any selected features in the land units layer.
2. You may use the Clear Selected Features icon  to clear a selection.
3. Click the **Soils Map** icon .
4. The Soils Map and Inventory dialog box is displayed.
5. To create a Soil Map theme for **only a few** land units in the land units theme, first select the land units from the theme with the ArcGIS **Select Feature** icon .
6. Then click the **Soils Map** icon.



Check this box to summarize by field.

7. Select **Land Unit Layer** from the from the Selected Layer drop-down list.

8. Select **Soils Layer** from the drop-down list.
9. Accept the **Layer Name, Soils Map** or enter another name.
10. Accept the default file name or click the **Browse** to enter another file name.
11. Do not change the path of the new layer.
12. In the Soils Inventory Report Display options, check the check boxes for any items you want to include in the soils report, including the Customer Information.
13. To summarize by **Tract and Land Unit Numbers**, check the check box.
14. Click **OK**.
15. The Soils Map layer is added to the view at the top of the table of contents.
16. A soils report is displayed on top of the **View** window.
17. You may print and/or save the soils report by clicking on the **File** menu.
18. Use the standard Windows **Print/Save** functionality.
19. To close the soils report click on the **X** in the top right corner of the document.

Note: The Soils Inventory is saved to the customer folder in Resource_Maps/soils_map_out.htm

Modifying the Map Layout

- Use the Layout Toolbar located at the bottom of the ArcGIS interface to maneuver and edit within the Layout View.

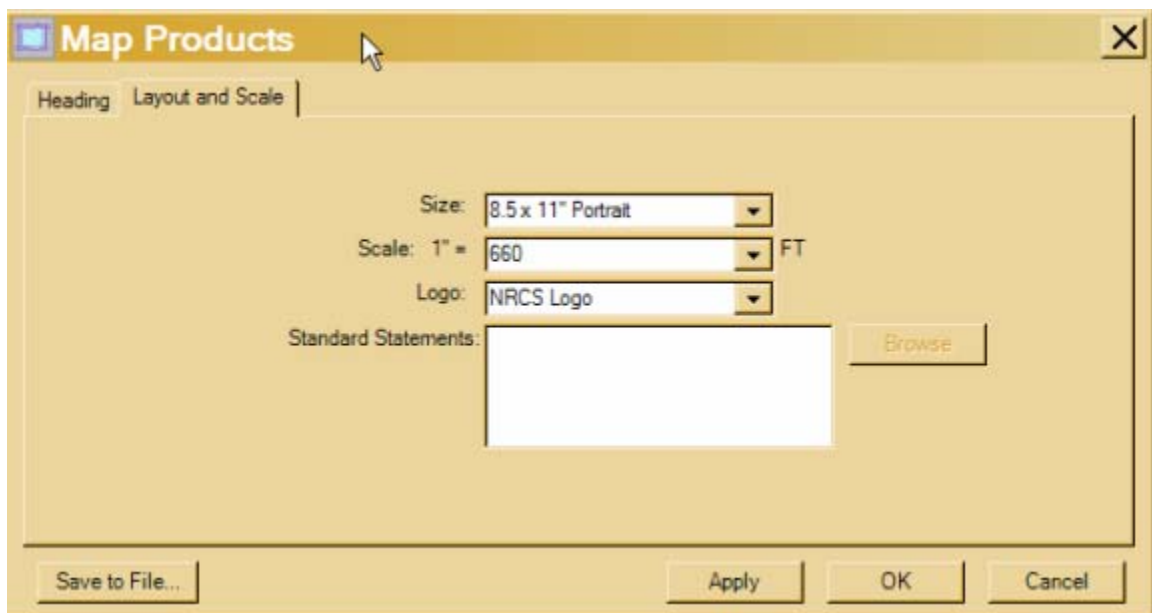


- If the Toolbar is not displayed, click on the **Tools** menu and check the **Layout** option.
- Use the **Select** icon (black arrow) to select the item you want to modify.
- Click on the element until a blue hashed “editing box” forms around the element.
- Right click on the element and click Properties.
- To switch back to the Data View, click on the Globe icon at the bottom of the ArcGIS interface.



Setting the Map Layout Scale

When you create a **Map Product**, don't forget to click on the **Layout and Scale Tab**.



For **Size** select a standard page size from the drop-down list.

For **Scale** select a standard scale from the drop-down list.

Click **Apply**.

Customize the Map Layout Scale from the Layout View

- Set the Map Layout Scale to 1 in = 660ft
- In the toolbar window at the top of the map layout view (left of the **Add Data** button), type **7920**

Start Editing the Map Scale Bar

- Select the Scale Bar, using the “arrow” pointer tool (a blue hashed box will appear)
- Right click on the selected Scale Bar, and choose **Properties**
- Click on the **Scale and Units** tab
- Where the dialog reads “When resizing,” select **Adjust Width**
- For **Division Value**, enter **660**
- For **Number of Divisions**, enter **3**
- Click **OK** until you exit the Scale **Properties**

Customize the Map Layout Legend

Start Editing the Legend

- Select the Map Legend, using the “arrow” pointer tool (a blue hashed box will appear)
- Right click on the selected Legend, and choose **Properties**
- Click on the **Items** tab

Remove Items from the Legend

- Under the **Legend Items** column, click and drag cursor down over entire list
- Click the “<” symbol to remove all the legend items
- Under the **Map Layers** column, click on a layer to add to the Legend
- Click the “>” symbol to add the legend item
- Click **OK** to exit the Legend **Properties**

Remove Extra Headings from the Legend

- Under the **Legend Items** column, click on one legend item to change
- Click the **Style** button>**Properties**>**General**
- Uncheck **Show Layer Name** and **Show Heading**
- Click **OK** until you exit the Legend **Properties**

Save and Print the Map Layout

Adjust Fit of Map Layout for Printing

- When you are ready to print your layout, go to **File > Page Setup**
- Under **Map Size**, check **Same as Printer**
- Under **Printer Setup**, click on the desired printer name
- Click **OK**
- Go to **File > Print Preview** to view the map layout as it will print
- Click the **Close** button
- After adjusting the layout for printing, **Check that the Scale is Correct!**

Save Map Layout

- To save the map layout, click on the red **Adobe Acrobat** button at the bottom of the Toolkit Toolbar (below the “Pencil” **Edit** button).
- Click **OK** to accept the default name, or enter a unique name, then click **OK**.
- The layout is automatically saved to your customer folder, under **Resource Maps**.

- *If you make additional changes* to the map layout, you *must* save your changes again
- Click on the red **Adobe Acrobat** button.
- You can click **Yes** to *replace the existing file*, or enter a new file name for the newly modified map

You can access and print the PDF file of the map layout from the customer folder, under **Resource Maps**, without being in ArcMap

Appendix A. - ArcGIS Basics

(Taken from Toolkit ArcGIS Extensions in the Toolkit Help, <http://cst.sc.egov.usda.gov/Toolkit/Help/>)

I. Data Frame and Layers

- A. Rename the Data Frame**
- B. Set Data Frame Properties**
- C. Add a Layer to the Data Frame**
- D. Connect to a Folder**
- E. Basic Layer Operations**
- F. Table of Contents**
- G. Rename a Layer**
- H. Zoom to Layer**
- I. Open a Layer's Attribute Table**
- J. Remove a Layer**

A. Rename the Data Frame

To rename a data frame (View), complete the following steps.

1. From the table of contents, right-click on the title "**Layers**".
2. Select **Properties**.
3. The Data Frame Properties dialog is displayed.
4. From the **General** tab, enter a new name for the data frame.
5. The new name is displayed in the table of contents.
6. Click **OK**.


B. Set Data Frame Properties

To set data frame properties, complete the following steps.

1. From the table of contents, right-click **Layers**.
2. Select **Properties**.
3. The Data Frame Properties dialog is displayed.
4. From the **General** tab, the **Map** unit for the data frame is automatically set to meters (i.e., the default for UTM NAD 83 data).
5. ArcGIS sets the map units based on the projection of the first data layer added to the data frame.
6. For the **Display** unit, select the unit that you wish to work with (generally this is set to feet).
7. Click **OK**.

C. Add a Layer to the Data Frame


To add a layer to a data frame (View), complete the following steps.

1. Click the **Add Data** icon  on the tool bar.
2. The Add Data dialog is displayed.
3. Browse to the location of the file that you wish to add.
4. If the directory you need is not available, see Connect to Folder.
5. Select the layer you wish to add to the data frame.
6. Click **Add**.


***NOTE:** You may select multiple layers by holding down the shift key and making your selections at the same time.*

D. Connect to a Folder

To connect to a folder, complete the following steps.






1. Click the **Add Data** icon  on the tool bar.
2. The Add Data dialog is displayed.

***NOTE:** the directories listed in the **Look in** dialog box are displayed from **ArcCatalog**, not from **Windows Explorer**.*

3. If the directory you need is not listed, click on the **Connect to Folder** icon .
4. Browse to the directory that you wish to add to the ArcCatalog directory list.
5. Highlight the directory.
6. Click **OK**.
7. The new directory is now available in the **Look in** dialog box (i.e., ArcCatalog).

E. Basic Layer Operations

Several basic display and query operations can be performed on layers.

- **Identifying:**  displays the attributes of a feature.
- **Selecting features from a layer:**  selects a feature by clicking on it. To select several features, draw a rectangular area around the area of interest or hold down the shift key when selecting the individual features.
- **Measuring distance:**  reports the accumulated distance between two or more points and temporarily displays them in the status bar.
- **Panning:**  repositions the display without changing the size.
- **Zooming:**  changes the size and extent of the map display in the View and changes the scale of the display. In addition, you can [zoom to layer](#).

F. Table of Contents

1. To turn a layer off, click to remove the **check mark** in the box.
2. To turn a layer on, click inside the **check box** to display the check mark.
3. To collapse the table of contents, click the **minus sign (-)** in the box.
4. To expand the legends in the table of contents, click the **plus sign (+)** in the box.
5. To change the order of a layer, click and hold the mouse over the layer name and drag the layer to the desired position.
6. ArcGIS draws themes sequentially starting with the layer at the bottom of the table of contents.

Note: For ease of viewing the table of contents, it is best to keep the base layer closed and turned off, which will hide the underlying layers used by the Toolkit personal geodatabase.

G. Rename a Layer

To rename a layer, complete the following steps.

1. Right-click on the layer name in the table of contents.
2. Select **Properties**.
3. The Layers Properties dialog is displayed.
4. From the **General** tab, enter the new **Layer Name**.
5. Click **OK**.
6. The new name is displayed in the table of contents (also legends created for layouts).
7. The original directory path and filename are shown under the source tab in the Layer Properties dialog.

Note: Changing the Layer Name does not change the data source file name (display purpose only).

H. Zoom to Layer

Since there are no active themes in ArcGIS, there is no zoom to active theme button. In order to zoom to a particular layer, complete the following steps.

1. Right-click on the layer name in the table of contents.
2. Select **Zoom to Layer** from the menu options.

Note: Zoom to Layer replaces ArcView's Zoom to Active Theme.

I. Open a Layer's Attribute Table

To view a layer's attribute table, complete the following steps.

1. From the table of contents, right-click on the name of the layer.

2. Select **Open Attribute Table**.

J. Remove a Layer

To remove a layer, complete the following steps.

1. From the table of contents, right-click on the name of the layer.
2. Click **Remove**.

Appendix B. - ArcGIS Symbology

(Taken from Toolkit ArcGIS Extensions in the Toolkit Help, <http://cst.sc.egov.usda.gov/Toolkit/Help/>)

Change Symbology

- A. Add Single Symbol Legends**
- B. Set up Legends using Unique Values**
- C. Save Symbology**
- D. Create Layer Files**

A. Add Single Symbol Legends

To add a single Symbol Legend, complete the following steps.

1. From the table of contents, right-click on the layer.
2. Select **Properties**.
3. The Layers Properties dialog is displayed.
4. Select the **Symbology** tab.
5. In the Show area, select **Features** and **Single symbol**.
6. Click **OK**.
7. Double-click on the colored box in the **Symbol** area.
8. The Symbol Selector is displayed.
9. Select **Category** from the drop-down list.
10. As needed, change the properties.
 - **Fill Color**
 - **Outline Width**
 - **Outline Color**
 - **Properties**
 - **More Symbols**
4. Click **Save**.
5. Click **OK**.

B. Set Up Legends Using Unique Values

To add a legend using unique values, complete the following steps.

1. From the table of contents, right-click on the layer.
2. Select **Properties**.
3. The Layers Properties dialog is displayed.
4. Select the **Symbology** tab.

5. In the **Show** area, select **Categories** and **Unique Values** for the legend type.
6. In the Value Field area, select the attribute from the drop-down list for sorting.
7. Double-click symbol box (i.e., a color box) to highlight the row.
8. As needed, **Add Values** or **Remove** values.
9. Click **Apply**.
10. Click **OK**.

C. Save Symbology

To save a legend for the current map document, complete the following steps.

1. From the table of contents, right-click on the layer.
2. Select **Save Symbology**.

D. Create Layer Files

Layer Files may be created as a way to store default legends for a layer. Layer files store the original dataset's location, the default legend, and layer name as a single file. Once layer files have been created they can be added as a layer (in place of the original dataset) in the map document. To create a new layer file, complete the following steps.

1. From the table of contents, right-click on the layer.
2. Select **Save as Layer File**.
3. Select the directory from the drop-down list for the new layer file.
4. Enter a name for the layer file.
5. Click **Save**.

Click **Save**.

Appendix C - Defining Projections

ArcGIS can re-project spatial data “on-the-fly,” only after you have defined the projection of the file you intend to re-project. For best results, copy the data onto your workstation before defining the data. Refer to the ‘Metadata’ to determine a file’s projection. The following instructions are for defining a commonly used projection, NAD 1983 StatePlane Maryland.

1. Click on **Start > All Programs > ArcGIS > ArcCatalog**
2. When ArcCatalog opens, browse to the file you need to “define”
3. Right click on the file, then choose **Properties**
4. Click the **Spatial Reference** tab, then click the **Edit** button
5. Click on the **Select** button
6. Double click on **Projected Coordinate System > State Plane > NAD 1983**
7. Double click on **NAD 1983 StatePlane Maryland FIPS 1900.prj**
8. Click on **OK** until you have completely closed the **Properties** dialog
9. To define additional files with the same projection, repeat steps 3 and 4. This time, click on the **Import** button. Browse to the previously defined file, and double click.
10. Click on **OK** until you have completely closed the **Properties** dialog
11. Close ArcCatalog

Appendix D – Using Conservation System Guides

1. Open the Customer Folder and choose the **Practice Schedule** tab
2. Select the **consplan** from the drop down window
3. The **Tract** number appears under the **Land Units** window
4. Click the **Plus sign** next to the Tract number to expand the list of fields
5. Check the box next to a field you want to select a Conservation System Guide for (you may check multiple fields with the same NRCS land use)
6. In the **Conservation System** window, click the **Guides** button
7. Click on the desired **Guide Code**, and click **OK**
8. Click the **Systems** button
9. Click on the desired **System Code**, and click **OK** (scroll down to the bottom of the list for R-Basic)
10. Click on the desired **Code** (hold the Ctrl-key to select multiple codes)
11. In the **All Practices** window, click the **Schedule Practices** button
12. The scheduled practices for each field are now listed in the **Schedule** window in the bottom half of the screen
13. Before you can **Save** and generate a plan using the **Plan Wizard**, you must enter the **Narrative** and the planned **Month** and **Year** for the scheduled practices