

# Customer Service Toolkit 2004 v5.0

## Installation Guide

Version 1.9

April 28, 2005



Natural Resources Conservation Service  
Information Technology Center  
Fort Collins, Colorado  
<http://www.itc.nrcs.usda.gov/>

Version 1.9

Date last modified 4/28/05

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## REVISION HISTORY

Version	Document Date	Change Summary
1.0	September 2004	Pilot release of this document.
1.1	January 25, 2005	Production release of this document.
1.2	January 26, 2005	Changed filenames for zip files and package.
1.3, 1.4, 1.5	January 27, 2005	Sections 1, 2.4, 3.4, 3.4.1, 3.5.1, 3.7.1, 3.8.1, and Appendix B modified.
1.6	January 31, 2005	Sections 1.1, 3.3, and 3.7 modified. Instructions for users to install Check In Wizard via the web-based installation package added in Section 3.7.3.
1.7	February 4, 2005	Sections 1, 3.4, and 3.9-3.11 modified. Minor wording changes to Overview and Scope on page iii. Section 1.2 added.
1.8	February 6, 2005	Sections 3.4.2, 3.4.2, 3.5, 3.5.1, 3.5.2 modified. Minor wording changes (Added .xx to various filenames)
1.9	April 28, 2005	Sections 1, 1.2, 3.3, 3.4, 3.4.1, 3.7, 3.8, and 3.11 modified. Appendix C added.

## OVERVIEW

This document contains installation instructions for the Customer Service Toolkit 2004 Version 5.0, the Check In Wizard Version 1.0, and Toolkit Utilities (Export Layout Utility and Toolkit APR Utility). Installing Toolkit 2004 requires a team effort from ITS System Administrators, State Toolkit Coordinators, State GIS Coordinators, and Local Field Office Staff. The overall installation process involves the following:

- Toolkit/GIS coordinators prepare the site to install Toolkit 2004 software.
- Toolkit/GIS coordinators enroll Toolkit users and set Toolkit permissions.
- ITS System Administrators install (or reinstall) Toolkit 2004 software.
- ITS System Administrators install optional software and utilities.

## SCOPE

This document contains installation instructions for (1) Customer Service Toolkit 2004, (2) Toolkit Utilities (Export Layout Utility and Toolkit APR Utility), (3) Check In Wizard Version 1.0, and (4) Soil Data Viewer. Information on preparing for the installation, registering endpoints, and setting up Toolkit permissions for users is also provided.

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## 1. Installation Components

The Toolkit 2004 v5.0 installation package contains files for installing Toolkit 2004 v5.0, Check In Wizard v1.0, and Toolkit Utilities. While Toolkit 2004 v5.0 is to be installed on designated workstations, Check In Wizard and Toolkit Utilities are optional. The installation package for Toolkit 2004 v5.0 (Build 66) also includes a hot fix for ArcGIS, designed specifically for NRCS by ESRI. The ArcGIS hot fix will not be uninstalled if Toolkit 2004 v5.0 is removed from the workstation.

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**Note:** Do not uninstall the ESRI Hot Fix (listed as 'NRCS ESRI QFE-DT-83-CQ00261837 ArcGIS SP3 patch') from any of the workstations.

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### ***Database Schema Change***

A new database schema is being deployed to support Build 66 of Toolkit 2004. When installing Toolkit 2004 Build 66, the installation package will automatically:

- **Remove** the previous version of Toolkit 2004, and
- **Update** the Toolkit geodatabase.

### ***Soil Data Viewer Option in Toolkit 4.1***

If Toolkit 4.1 is currently installed on a workstation, and the Soil Data Viewer option was not selected during installation, then Toolkit 4.1 will be automatically uninstalled by the Toolkit 2004 v5 installation package. Conversely, if Toolkit 4.1 is currently installed on a workstation, and the Soil Data Viewer option was selected during installation, then Toolkit 4.1 will be automatically uninstalled by the Toolkit 2004 v5 installation package.

### ***Toolkit 2004 v5.0 Software Summary***

- **Toolkit 2004** – ITS System Administrators should install Toolkit 2004 (v 5.0) on designated Toolkit workstations.
- **Check In Wizard (optional)** – The Toolkit Check In Wizard is used to check in planning data from Toolkit into the National Conservation Planning Database, so it be accessed by the Performance Results System. This software should be installed on at least one Toolkit 2004 workstation per office location. Although previously an instance of Check In Wizard was installed by each user of a given workstation, the ITS System Administrator now installs one instance of Check In Wizard per workstation which can be used by all users of that workstation. Installation is optional on additional Toolkit workstations within the same office.
- **Toolkit Utilities (optional)** – The *Toolkit APR Utility* reads in an APR file and creates a report on the extensions and data layers the APR file is dependent on, replaces the any occurrence of the old Customer\_Files folder with the new checkout folder Customer\_Files\_Toolkit in any data paths in an APR file, and automatically removes unnecessary Toolkit references. The Export Layout utility converts ArcView 3.3 layouts to graphic files (JPG, BMP, WMF, or EPS) to store as a historical record of maps developed in former versions of Toolkit.

- **Soil Data Viewer (optional)** – Soil Data Viewer, an extension to ArcView® that creates soil-based thematic maps, provides a tool for geospatial analysis of soil information for resource assessment and management.

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**Note:** Before Toolkit 2004 can be installed by the ITS System Administrator, Toolkit Coordinators should determine for each workstation or laptop which optional software, if any, will be needed on each system.

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## 1.1. Team Effort

Installing Toolkit 2004 requires a team effort by ITS System Administrators, State Toolkit Coordinators, State GIS Coordinators, and Local Field Office Staff. For instance, Toolkit 2004 Toolkit/GIS Coordinators prepare the site to install Toolkit 2004 software, enroll Toolkit users, set Toolkit permissions, and determine what optional software should be installed on a given workstation or laptop. ITS System Administrators install Toolkit 2004 software, Check In Wizard, and Toolkit Utilities. ITS System Administrators will need to perform any reinstallations of Toolkit 2004. Each user of Check In Wizard on a given workstation must uninstall his/her instance of Check In Wizard before the ITS System Administrator can install the new version of Check In Wizard. More information on the specific responsibilities of Toolkit/GIS Coordinators and ITS System Administrators are provided in Sections 2 and 3, respectively.

## 1.2. Silent Installation

A silent installation capability is included in the installation package. Silent installation differs from interactive installation in that it is intended to upgrade the workstation from a previous build to a new build, without modifying the original **type of installation** (i.e., **production** or **training**). Consequently, a workstation previously configured for training will remain configured for training after the silent installation. Some of the features of a silent installation are as follows:

- Suppresses interactive user interface screens which the InstallShield Wizard displays during an interactive installation.
- Does not suppress errors. If an error occurs during installation, it will be displayed and the installation will stop.
- Uses the configuration file from the previous Toolkit 5.0 build installation. If the previous installation was for production, the silent installation will be for production. If the previous installation was for training, the silent installation will be for training.
- Automatically uninstalls the previous Toolkit 5.0 build.
- Only installs over the previous build. For example, a silent installation of Build 66 will install over Build 65 or 64. It will not install over Build 63. Nor will it reinstall over Build 66 after Build 66 was successfully installed. In these cases, run the interactive installation.
- Displays the InstallShield logo in the Taskbar to indicate the installation is running. When this logo disappears, the installation is complete.



The silent installation requires that the previous build of Toolkit 2004 v5.0 is installed on the workstation. If it is not, you will need to perform an interactive installation.

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**Note:** In order to change the type of installation (i.e., production or training) on a given workstation, you will need to: (1) uninstall the version of Toolkit 2004 that currently resides on that workstation, and (2) complete the interactive installation of Toolkit 2004 according to the instructions in this document.

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## 2. Toolkit/GIS Coordinator Responsibilities

The Toolkit/GIS Coordinators are responsible for preparing the sites prior to the actual Toolkit 2004 software installation performed by the ITS System Administrator. Before the ITS System Administrators can begin installing Toolkit 2004 on the various workstations/laptops, Toolkit Coordinators need to:

- **Determine** for each workstation/laptop which optional software (if any) will be needed
- **Copy** customer folders from workstations to the server
- **Remove** Toolkit 4.1 Customer Folders from workstations/laptops
- **Organize** Customer Folders by county
- **Enroll** the Toolkit users and set up required Toolkit permissions
- **Register** endpoints, in cooperation with the ITS System Administrator.

These tasks are described in more detail in Sections 2.1 through 2.5.

### 2.1. Determine Optional Software to be Installed on each Workstation

Before Toolkit 2004 v5.0 can be installed by the ITS System Administrator on the workstation/laptop, Toolkit Coordinators should determine for each system which optional software, if any, needs to be installed along with Toolkit 2004. Provide to the ITS System Administrator a listing of software to be installed on each client system.

### 2.2. Copy Customer Folders from Workstations to the Server

Before installing Toolkit 2004, *any customer folders on a user's workstation that have more current data than the copy on the server* should be copied to the server. The state Toolkit/GIS coordinator should work with local field office staff to ensure that customer folders have been copied from the user's workstation (**C:\Customer\_Files**) to the server (**F:\Customer Files**) and prepare to migrate the data to the new server folder **F:\Customer Files Toolkit**.

The ITC guidance is that customer folders are to be placed on the servers in the field offices that most frequently use the customer folders. This guidance is to ensure that frequently accessing customer folders is supported over the high-speed, local-area network (LAN) rather than the low-speed, wide-area network (WAN). The "endpoint" server folders for the check in/check out process must reside on a server class machine

with backup procedures implemented. If a server is not available at a field office, a workstation must not be substituted as an "endpoint". In this case, the customer folders must be moved to a field office that has an endpoint server. The field office users will access the customer folders over the WAN.

### 2.3. Remove Toolkit 4.1 Customer Folder from Workstations

The Toolkit/GIS Coordinators must remove the Toolkit 4.1 customer files folder (**C:\Customer\_Files**) before the ITS System Administrator installs Toolkit 2004 on the workstation.

### 2.4. Organize Customer Folders by County

It is recommended that the server folder **F:\Customer Files** contain customer folders for a single county. If the server contains customer folders for more than one county, these customer folders can be separated and moved to the subfolder created for each county.

For example, a server contains customer folders for Abel county and Baker county within folder **F:\Customer Files**. Create a subfolder for Abel county (**F:\Customer Files\Abel**) and another subfolder for Baker county (**F:\Customer Files\Baker**). Identify the customer folders that belong to Abel county and move them to the **F:\Customer Files\Abel** subfolder. Move the remaining customer folders that belong to Baker county to the **F:\Customer Files\Baker** subfolder. The **F:\Customer Files\Abel** server folder is now organized and ready to be migrated to the new check in/check out server folder **F:\Customer Files Toolkit**.

The Toolkit/GIS coordinator should provide a list of counties and associated subfolder names to the ITS System Administrator who will set up the necessary folders on the server(s) and set permissions. (See *Appendix A* for example endpoints for the site servers.)

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**Note:** Once the ITS **System** Administrator has set up the folders on the server, the Toolkit/GIS coordinator can run the utility to register endpoints.

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### 2.5. Enroll Toolkit Users

State Toolkit/GIS Coordinators use the Toolkit User Permissions Web site to enroll Toolkit users (NRCS employees and affiliates). Toolkit users must have a Level 2 eAuthentication account.

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**Note:** Users may **apply** for Level 2 access by visiting the eAuthentication Web site at <http://www.eauth.egov.usda.gov/>, or by calling 800-457-3642.

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To enroll Toolkit users, complete the following steps.

1. Access the ToolkitV5 User Permissions Web site:
  - <http://cst.nrcs.usda.gov/Toolkit>

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**Note:** If the Security Alert window appears, click **OK**.

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2. Select **Training Login** or **Production Login**, as appropriate.
3. When the eAuthentication window appears, click **Continue**.
4. In the eAuthentication Login window, enter your **User ID** and **Password**.
5. Click **Login** or select **Enter**.
6. Click **Tools** on the main menu and then select either
  - **Toolkit User Permissions** for NRCS employees, or
  - **Toolkit Affiliates User Permissions** for non-NRCS employees.



**Permissions**

Clear | Delete | Print | Save

state:  Office: NATIONAL INFORMATION TECHNOLOGY CENTER

NRCS Employee: Ekblad, Steven

**User's Geographic Location Permissions**

state:

**Offices in this State**

- AKRON SERVICE CENTER
- ALAMOSA SERVICE CENTER
- AREA + AREA OFFICE
- BAGGS PROGRAM DELIVERY POINT
- BRIGHTON SERVICE CENTER

**Counties in this State**

- ADAMS
- ALAMOSA
- ARAPAHOE
- ARCHULETA
- BACA

**User's Office Permissions**

**User's County Permissions**

**User's Program Permissions**

Clear

**Toolkit User Basic Permissions**

- Toolkit User Basic Read/Only
- Toolkit User Basic Read/Write
- Toolkit User Basic All
- Toolkit State Coordinator

**NOTES:**

1. Toolkit User Basic Read/Only - can check out, but not check in
2. Toolkit User Basic Read/Write - can check out and check in changes
3. Toolkit User Basic All - check out, check in and unlock customer folders

The permission Toolkit State Coordinator is a separate permission which allows the user to set user roles and permissions only. It does not specify Toolkit application permissions. If State Coordinator needs permissions into Toolkit application, then they need to be set with one of the above permissions (1-3).

**Toolkit User Permissions Web Site**

7. In the first block, select the **State** associated with this user.

- A list of offices for that state will be displayed in the **Office** field at right.
8. Select an **Office** from Office drop-down list. (Example: Juneau Field Office)
- The employee list (NRCS or affiliate) is displayed.
9. Select the **Employee** (NRCS or affiliate) from the drop-down list.
- The user's Office and County Permissions will be displayed on the screen.
10. In the *User's Geographic Location Permissions* block (shown below), select the **State** for which the user needs permissions.
11. Select any additional Offices in the state from the left-hand window and click **Add**.
12. If needed, select the User's Office Permissions in the right-hand window and click **<-Remove** or **Remove All**.

13. If needed, select **County in this State** and click **Add**.
14. If needed, select the county in the right-hand window and click **<-Remove** or **Remove All**.
15. In the *User's Program Permission* block (shown below), select one of the following three basic user roles, as appropriate for this user:
- User Basic **Read/Only**

- User Basic **Read/Write**
- User Basic **Read/Write/Unlock**

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**Note:** Unlock allows you to remove someone else's lock on a customer folders. This features simple unlocks the files. If changes were made to the file, the **changes are lost** when the folder is unlocked.

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16. For users who need access the Toolkit Permissions Web site, check **Toolkit State Coordinator**.

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**Note:** The **Toolkit State Coordinator** role only grants the user access to Toolkit Permissions Web site. If the individual also will be using Toolkit 2004, be sure that the user also has one of the three basic user roles listed in step 14 above.

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17. If needed, you may **Clear**, **Delete**, or **Print** your selections.
18. Click **Save**.
19. If the user requires permissions for more than one state, repeat steps 8 through 13 above. (The same permissions granted to this user will apply to each state.)

For an overview of Toolkit permissions, see the “Toolkit User Permissions” section under “Getting Started” in *Toolkit Online Help*.

### 3. ITS System Administrator Responsibilities

Installing Toolkit 2004 is a multi-step process to be completed by ITS System Administrators. Installation tasks include:

- **Verify** Toolkit prerequisites and system requirements for registering endpoints (Section 3.1) (see *Appendix A* for example endpoints for the site servers)
- **Backup** Toolkit 4.1 data on the server (Section 3.2)
- **Create** Customer Files Toolkit folder on the server (Section 3.3)
- **Download** Toolkit 2004 software (Section 3.4)
- **Install** Toolkit 2004 on the first workstation/laptop (Section 3.5)
- **Set up** folders and set permissions needed to run the Endpoint Utility.
- **Register** endpoints, in cooperation with the Toolkit Coordinator.

- **Install** any optional software applications on the workstation, as directed by the Toolkit Coordinator. Optional software includes Check In Wizard, Toolkit Utilities, and Soil Data Viewer (Sections 3.7-3.9).
- **Install** Toolkit 2004 and utilities software on all other workstations/laptops (Section 3.10)

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**Note:** At each office location, Check In Wizard v1.0 should be installed on at least one workstation.

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### 3.1. Verify Toolkit 2004 Prerequisites

#### **Software Requirements**

Before installing Toolkit 2004 on a workstation/laptop, verify that the system has the following software installed:

- **CCE Windows XP with SP 1 (CCE Update CD #1)**
  - Microsoft .NET Framework 1.1 Toolkit 2004 on a workstation/laptop, verify that the system has the following software installed (CCE Update CD #1)
  - Microsoft Office XP (Professional Version)
- **CCE Version of ESRI® ArcGIS 8.3 (or ArcEditor 8.3) with SP-3**
  - Single license required for field users with laptops
  - Multi-user license required for site users
  - For specifics, see the CCE Team Services Web site.

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**Note:** Toolkit 2004 should only be installed on a CCE configured workstation.

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#### **Hardware Requirements**

Prior to installing Toolkit 2004 with ArcGIS 8.3 or ArcEditor 8.3, verify that the hardware has sufficient memory to operate ArcGIS (see *Appendix B*).

#### **Network Requirements**

In order to install Toolkit on a laptop or desktop workstation, you must have either:

- A USDA network
- A USDA VPN access (for more details, consult the following Web page: <http://www.itc.nrcs.usda.gov/toolkitng/toolkit2004/default.htm>)

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**Note:** Dial-up connections are not supported by Toolkit 2004.

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#### **Remove State and Local Scripts**

Remove all applications, scripts, and batch files that were created for Toolkit 4.1. If these files are not removed prior to installing and using Toolkit 2004, there is a high potential for losing data. Furthermore, customized state and local scripts are not supported by Toolkit 2004.

### 3.2. Backup Toolkit 4.1 Data from the Server

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**WARNING!** FAILURE TO SUCCESSFULLY BACK UP CUSTOMER DATA MAY LEAD TO THE PERMANENT LOSS OF BUSINESS DATA.

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Prior to migrating Toolkit 4.1 data to Toolkit 2004, follow your service area's procedure for backing up Toolkit data. Backup procedures vary by service area due to the size of the data and backup capacity. The time required to perform the backup depends on your server speed, network response time, number and size of files and other factors. Times may vary from several minutes to several hours.

Be sure to budget adequate time to backup the following data:

- All files in the **F:\Customer Files** folder on the server.
- All files in **F:\FOTG**.
- The Toolkit 4.1 Toolkit Customers **.pst** file in F:\CST. (Outlook is no longer required for Toolkit. Therefore, beginning with Toolkit 2004 v5.0, this folder for maintaining mailing lists in Outlook is optional.)

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**Note:** Toolkit preferences in Outlook do not have to be migrated because Toolkit 2004 does not use Outlook.

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### 3.3. Create Customer Files Toolkit Folder on the Server

The ITS System Administrator logs onto the field office server and completes the following steps.

1. Make sure that there is adequate space to make a complete copy of the Toolkit 4.1 customer data located in the folder **\\<server name>\data\Customer Files**.
2. Create a copy of the **Customer Files** folder containing all the customer folders and rename it to **Customer Files Toolkit**. The ITS System Administrator may need to set Full Control permissions for domain users on all subfolders and files in the **Customer Files** folder in order to create a complete copy of the **Customer Files** folder.

---

**Note:** At this point, both the **Customer Files** and **Customer Files Toolkit** folders are present.

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#### ***Change Permissions on the Customer Files Toolkit Folder***

The ITS System Administrator changes the permissions on the new Customer Files Toolkit folder (i.e., **\\<server name>\data\Customer Files Toolkit**) and adds the Toolkit service account for the appropriate domain (AgWest\Thaddeus.W.Uccello, AgCentral\Thaddeus.C.Uccello, or AgEast\Thaddeus.E.Uccello)

1. Right-click on the **Customer Files Toolkit** folder and select **Properties**.
2. Select the **Security** tab.

3. Uncheck “**Allow inheritable permissions from parent to propagate to this object.**” Click **Copy**.
4. Reset permissions for **Everyone** to only allow read access by selecting **Everyone**.
5. Uncheck all permissions except for **Read**. Click **Apply**.
6. Click **Add** to add the Toolkit services account appropriate for the domain.
7. Type in the appropriate Toolkit services account (e.g., Thaddeus.W.Uccello) using one of the accounts listed below.
  - AgWest\Thaddeus.W.Uccello
  - AgCentral\Thaddeus.C.Uccello
  - AgEast\Thaddeus.E.Uccello
8. Click **Check Names**.
9. When the Toolkit services account is found, click **OK**.
10. Set permissions to **Full Control**. Click **Apply**.

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**Note:** If the **Domain Admins** and/or **SYSTEM** groups are not present, add the missing groups and set their permissions to **Full Control**.

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11. To add the **Domain Admins** group, click **Add**. Type “Domain Admins” into the dialog box. Click **Check Names**. Click **OK**.
12. Select **Domain Admins**. Set permissions to **Full Control**. Click **Apply**.
13. To add the **SYSTEM** group, click **Add**. Type “SYSTEM” into the dialog box. Click **Check Names**. Select **SYSTEM** in the Select Matching Items dialog box. Click **OK**. Click **OK** again.
14. Select **SYSTEM**. Set permissions to **Full Control**. Click **Apply**.
15. Remove all other group or user names, EXCEPT for **Administrators** (if present), **Domain Admins**, **Everyone**, **SYSTEM**, and the Toolkit services account (e.g., Thaddeus.W.Uccello), by selecting the group or user name and clicking on **Remove**.
16. Click **Advanced**.
17. Check “**Reset permissions on all child objects and enable propagation of inheritable permissions.**” Click **OK**.
18. Click **Yes** in the Security dialog box.
19. Wait for permissions to be updated. (This could take a long time to reapply permissions to all files within the Customer Files Toolkit folder.)
20. Click **OK**.



### 3.4. Download Toolkit 2004 Software

This section contains instructions for downloading the Customer Service Toolkit 2004 (v5.0) and the APR Utilities software files.

1. Log onto the client machine using your non-administrative user account.
2. Using Internet Explorer, access the ITS Team Services Web site.
  - <http://century.itc.nrcs.usda.gov/cce-states/Default.htm>
3. Log on using your userid and password.
4. Click on **Supplemental Applications and Instructions** on the left menu to access the software download page.
5. Find the item "**CSToolkit2004V5.0.xx.zip**" located in this list, where **xx** represents the latest build number for Toolkit.

**Example:** The filename for installation package for Toolkit 2004 v5.0 Build 66 would be "**CSToolkit2004v5.0.66.zip**" in the list.

6. Click on **CSToolkit2004V5.0.xx.zip**.
7. Click on **Save**.
8. Browse to the **C:\temp** folder and click on **Save**.
9. Once the download has completed, click on **Close**.
10. Close the Internet Explorer Window.
11. Click on **Start > Run > Browse** to **C:\temp**; change "**Files of Type:**" to **All Files** to view all files.
12. Select **CSToolkit2004V5.0.xx.zip** and then click **Open**.
13. Click **OK**. The Winzip window will appear.
14. Click on the **Extract** icon.
15. In the Extract dialog window, check that **Extract to:** is set to **C:\temp**. (If not, change to **C:\temp**.)
16. Click **Extract**.
17. Wait for the file extraction to complete.
18. Close the Winzip window.

#### 3.4.1. Position Files for Server-based Installation

To prepare for installation, the Toolkit installation package can be placed on the server, or if your work site has no server, on the workstation hard drive, CD, or USB Device. The steps for positioning files for server-based installation are provided below. These

instructions assume that you have downloaded the Toolkit 2004 Software as detailed at the beginning of Section 3.4.

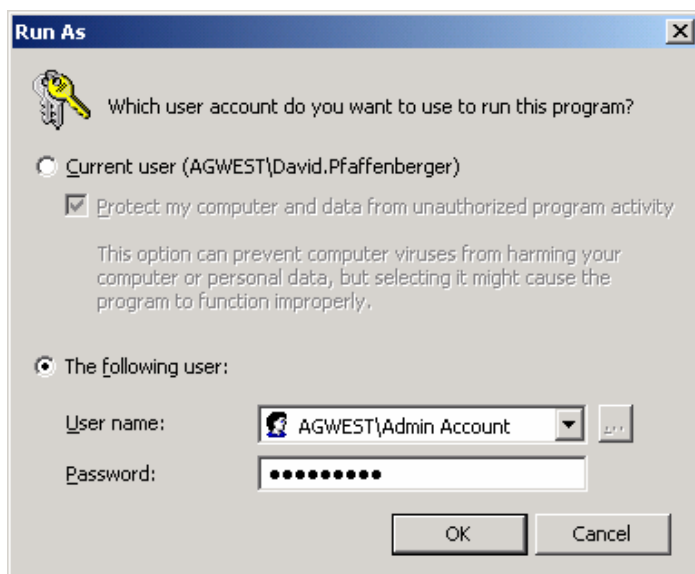
If you have a server at your location and plan to perform server-based installation of the software, the instructions for mapping a drive to a server will only need to be performed one time (as the software will be available on the server, where it can be used for all installations on client machines that have access to that server).

If you are installing the software at a work site that does not have a server, proceed to Section 3.4.2.

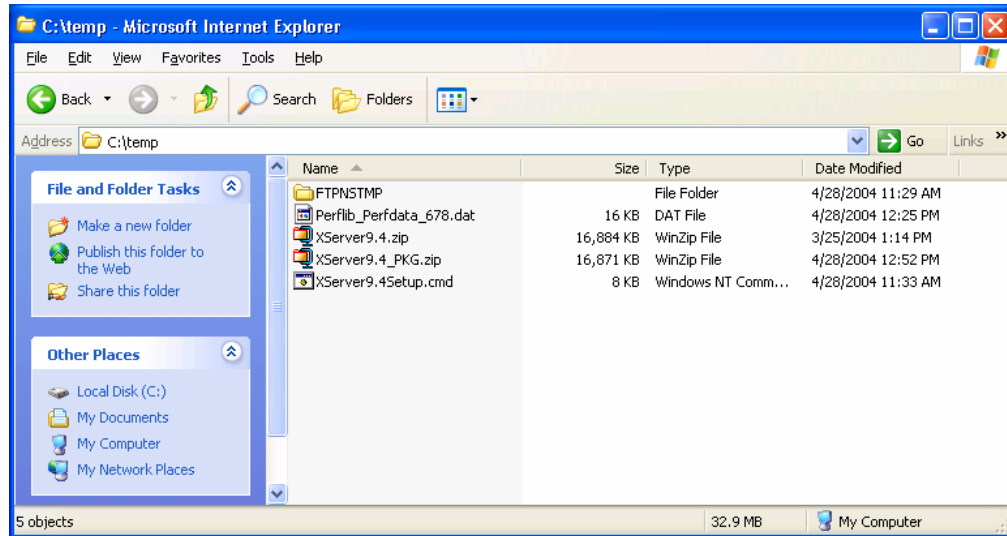
### ***Map Drive to Server***

To map a drive on the client machine to a server, follow these instructions.

1. Click on **Start > All Programs > Administrative Tools > IEAdmin**.
2. Click on **The following user:** radio button and enter your **domain administrative account** and **password** then click **OK**.

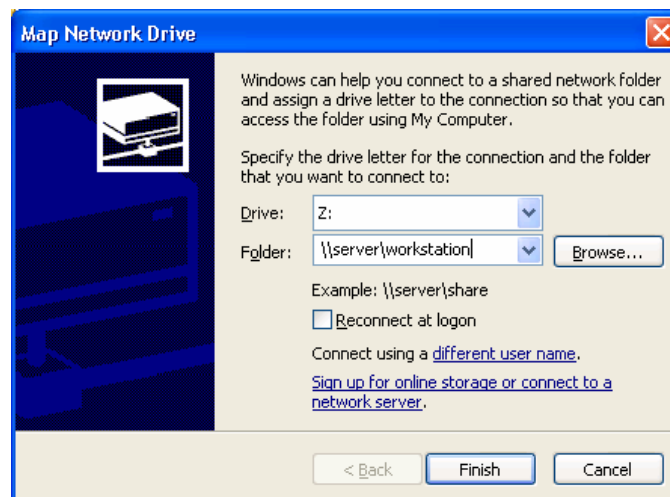


3. An Internet Explorer (IE) window will open. In the **“Address”** field, type: **c:\temp**, then press **<Enter>**.



**Example IE window displaying files that reside in C:\temp. The specific files listed in this window will vary between client machines.**

4. When the following window appears, click on **Tools > Map Network Drive**.
5. Select **Z** for the drive letter and type: **\\Server\workstation** for the folder location, where **Server** is either the Server IP or Server Name. Make sure there is **no** check mark next to **Reconnect at Logon**, then click on **Finish**.



6. The drive is now mapped to the server on which the Supplemental Applications reside.

### **Extract Application Files to the Server**

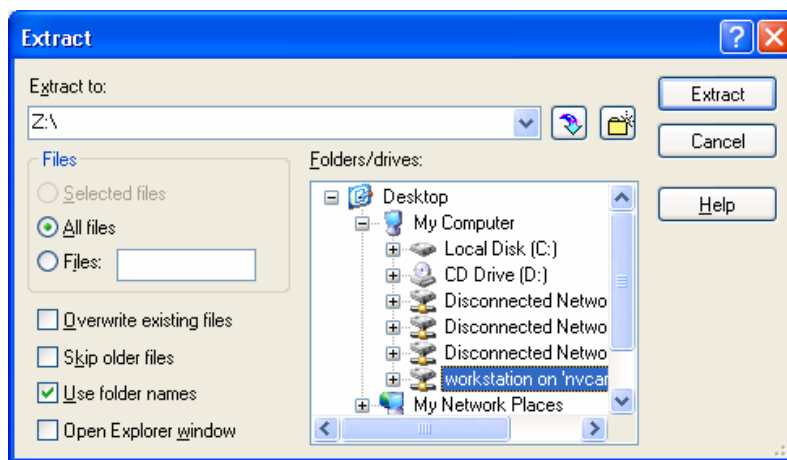
Follow the instructions below to extract the Toolkit 2004 software (including Check In Wizard and Toolkit Utilities) to the XP directory of the server.

1. With the Internet Explorer window open and showing the **C:\temp** folder in the "Location" field, locate and double-click on **CSToolkit2004V5.0.xx\_Setup.cmd**.

2. A Command window should open, followed by a Winzip window.
3. If the following message appears to inform that no packages were found, click **OK**.



4. In the Winzip window, click on **Extract**.
5. Change the “**Extract to:**” field to **Z:\** .



6. Click on **Extract** to initiate the extraction of files to the server.
7. Wait until the file extraction completes. Close the Winzip window.
8. In the Command window, you will see “Press any key to continue...” Press <Enter> to close out the screen.




---

**Note:** If any errors occurred during the extraction process, an error message describing the issue will be displayed in the Command window.

---

9. The Toolkit 2004 files are now available on the server, ready for installation on client machines (and the old CST 4.01.0004 and 5.0 Builds 64-65 files have all been removed from the server).
10. In the Internet Explorer window showing the **C:\temp** folder, click on **Tools > Disconnect Network Drive**.
11. Select the **Z:\** drive and click **OK**.
12. Close the Internet Explorer Window.

### 3.4.2. Position Files on a Workstation Hard Drive, CD Drive, or USB Device

If it is not possible to perform server-based installations at your location, Toolkit 2004 can be installed from a local storage device, such as workstation hard drive, CD drive, or USB device.

---

**Note:** If you performed the instructions in Section 3.4.1 to prepare for server-based installation of Toolkit 2004, you do not need to complete this section. Proceed to Section 3.5.

---

#### ***Extract Application Files to a Location Other than the Server***

Follow the instructions below to extract the Toolkit 2004 installation package to a local storage device.

1. Click on **Start > Run**.
2. **Browse** to **C:\temp** then change “**Files of Type:**” to **All Files** to view all files.
3. Select **CSToolkit2004V5.0.xx.zip** and click **Open**.
4. Click **OK**.
5. A Winzip window will open.
6. In the Winzip window, click on **Extract**.
7. In the Winzip window, for a Workstation Hard Drive Installation, set the “Extract to:” field to **C:\temp**. For a CD-RW drive, set the “Extract to:” field to **[drive letter]:\** of the CD drive. For USB Device installation, set the “Extract to:” field to **[drive letter]:\** of the Removable Disk.
8. Click **Extract** to initiate the extraction of files.
9. Wait until the Winzip completes the extraction of files.
10. The necessary files for installing *Toolkit 2004 v5.0*, the *Check In Wizard*, and the *Toolkit Utilities* are now staged on a local storage device.

You now may begin installing the Toolkit 2004 v5.0 software (and optional utilities) on the first workstation or laptop using the instructions provided in Section 3.5.

### 3.5. Install Toolkit on a Workstation

The ITS System Administrator installs Toolkit 2004 on the target workstations and laptops at each office location. On the client machine, Toolkit 2004 will be installed in C:\Program Files\USDA\Toolkit5\ for each user.

Before installing Toolkit 2004, complete the following steps.

1. Verify the prerequisites for the first client computer (see *Appendix B*).
2. Select one of two available methods of installation (i.e., from a server or from a drive on a local workstation)
  - **From a server** – Section 3.5.1 will guide you through a server-based installation. The instructions assume that you will use drive **Z:\** and that it is mapped to the Server's **G:\workstation** folder before you continue. This is not a silent installation; therefore, you cannot use the Supplemental Applications (SUPPAPP) program. It must be loaded individually.
  - **From a drive on the local workstation, CD drive, or USB device** – The instructions in Section 3.5.2 assume that you do not have a server and will be installing the application locally. To prepare for this type of installation, if you have not done so already, you will need to extract the **CSToolkit2004V5.0.xx.zip** file (located in your **C:\temp** folder). You may extract this file to any local storage device, including a RW-CD Drive, USB Device, or a local folder (e.g., C:\temp).

#### 3.5.1. Server-based Installation

---

**Note:** We recommend the server-based installation for offices that will be installing Toolkit 2004 on numerous client machines.

---

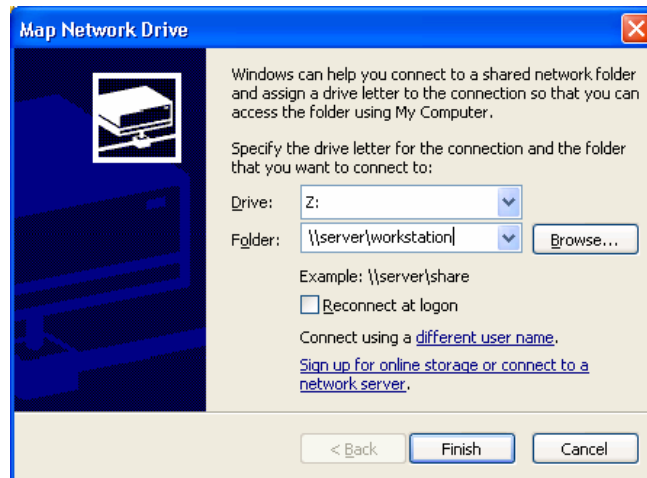
1. Log in with an account that has **administrative privileges** to complete these tasks, if you're not already logged on.

---

**Note:** If you have already mapped a drive (step 3.4.1), you'll need to open Explorer (right-click **Start**, click on **Explore**) and skip ahead to step 5.

---

2. Right-click on **My Computer**, then click on **Map Network Drive**.
3. Select **Z** for the drive letter and type: **\\Server\workstation** for the folder location, where **Server** is either the Server IP or Server Name.



4. Make sure there is **no** check mark next to **Reconnect at Logon**, then click on **Finish**. You now have a drive mapped to the Server where the Supplemental Applications reside.
5. Click on **Start > Run**, browse to **Z:\XP\NRCS\CustomerServiceToolkit\Client\2004V5.0.xx\**, select **install.cmd**, click **Open**, then click **OK**.
6. A DOS window will appear and run several scripts automatically.

```

C:\WINDOWS\System32\cmd.exe
of install.cmd *
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** increment eve
rytime you change install.cmd *
C:\temp\XP\rd\arts\client\1.1\pkg>REM *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** The real guts of the install.cmd *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** Tailor as needed *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** put your tailored code after this
line *****
C:\temp\XP\rd\arts\client\1.1\pkg>SET CMICR=CMICR
C:\temp\XP\rd\arts\client\1.1\pkg>SET CMDESC=
C:\temp\XP\rd\arts\client\1.1\pkg>SET INSTUER=1

```

7. Proceed to Section 3.5.3.

### 3.5.2. Installation from the Workstation Hard Drive, CD, or USB Device

If you performed the steps in Section 3.4.2, you will use the instructions in this section to install Toolkit 2004 v5.0 on the various client machines. To install Toolkit 2004 from a local storage device:

1. Log in with an account that has administrative privileges to complete these tasks.

2. Click **Start > Run** then **Browse** or type in:  
**[Drive]:XP\NRCS\CustomerServiceToolkit\Client2004V5.0.xx\.**

---

**Note:** [Drive] is the location of your unzipped files (i.e., C:\temp, RW-CD, or USB Drive letter).

---

3. Select **install.cmd** and click **Open**.
4. Click **OK**.
5. A DOS window will appear and run several scripts automatically.

```

C:\WINDOWS\System32\cmd.exe
of install.cmd *
C:\temp\XP\rd\arts\client\1.1\pkg>REM **** increment every
rytime you change install.cmd *
C:\temp\XP\rd\arts\client\1.1\pkg>REM *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** The real guts of the install.cmd
*****
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** Tailor as needed *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** put your tailored code after this
line *****
C:\temp\XP\rd\arts\client\1.1\pkg>SET CMICR=CMICR
C:\temp\XP\rd\arts\client\1.1\pkg>SET CMDESC=
C:\temp\XP\rd\arts\client\1.1\pkg>SET INSTUER=1

```

6. Proceed to the next section.

### 3.5.3. Silent versus Interactive Installation

The Toolkit 2004 installation will check for the existence of a Toolkit build on the workstation to determine whether it can proceed with a silent installation. The following four installation scenarios are possible.

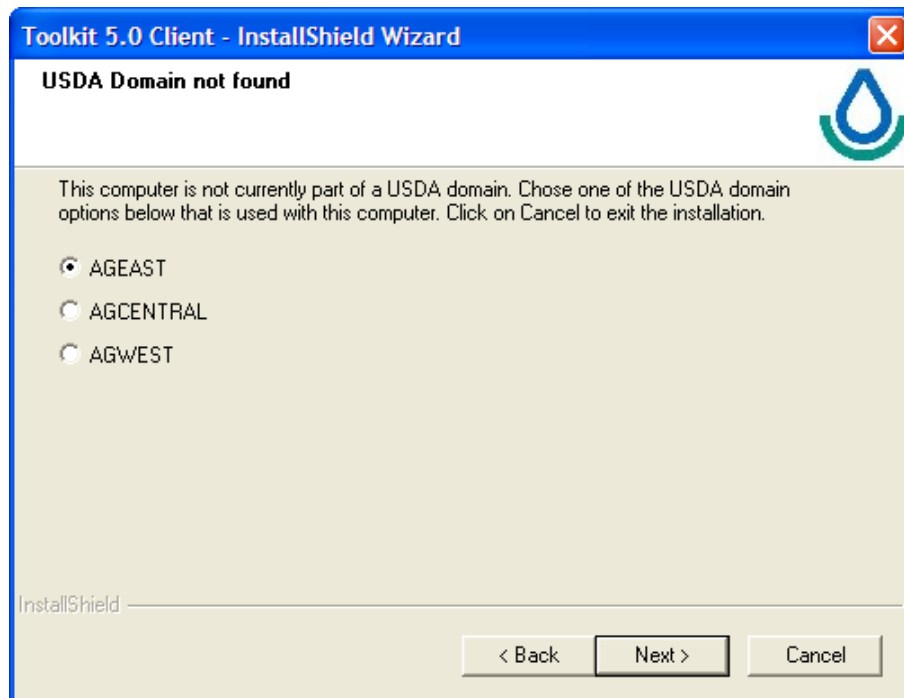
- **Previous Build Exists** - If the previous Toolkit 2004 build is installed on the workstation, a silent installation will be initiated. In this case, proceed to Section 3.5.5 to complete the installation.
- **Current Build Exists** - If the current build has already been installed on the workstation, the installation will proceed in interactive mode and the Repair/Remove dialog window will appear. You may cancel the installation, or select **Remove** to uninstall Toolkit 2004. (At that point, no build will exist on the workstation.)
- **No Build Exists** – If no build is detected on the workstation, an interactive installation will be initiated. Proceed to Section 3.5.4.
- **Other Build Exists** – If a version other than Toolkit 2004 v5.0 Build 64, 65, or 66 is detected on the workstation, then an error message will be displayed. You must uninstall the detected build and reinstall Toolkit 2004 (see instructions in Section 3.11).



### 3.5.4. Choose Installation Type

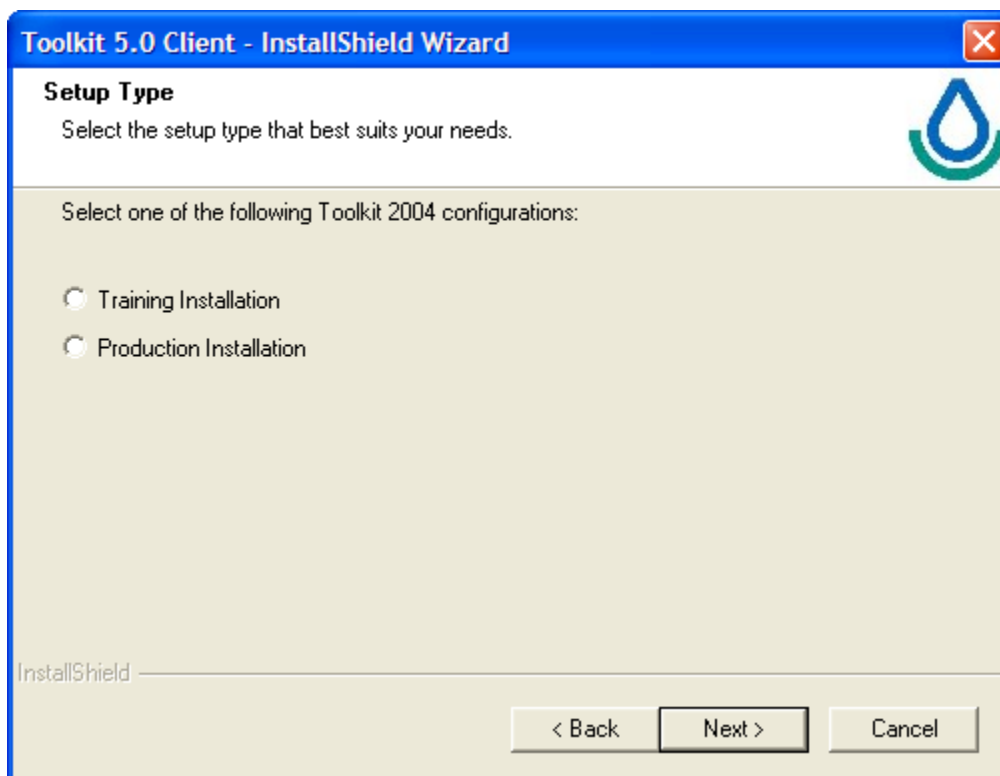
1. When the Toolkit 5.0 Client - InstallShield Wizard dialog window with the version number is displayed, click **Next**.

**Note:** If instead, the following window appears, your workstation is connected over a Virtual Private Network (VPN). Select the appropriate USDA domain and click **Next**.



*If the USDA Domain not found screen is not displayed, the InstallShield Wizard has automatically detected your USDA domain. Proceed to the next step.*

2. When the following window appears, select either **Training Installation** or **Production Installation** as your setup type and click **Next**.



### 3.5.5. Complete Installation

1. Wait for the installation to complete.

---

**Note:** If an error occurs, a message is displayed. Click **OK** and **Finish** to exit. Send email to [toolkitsupport@itc.nrcs.usda.gov](mailto:toolkitsupport@itc.nrcs.usda.gov), or contact the help desk for assistance.

---

2. Upon successful completion, the wizard will display a message confirming that the installation was successful. Click **Finish** to exit.
3. For users who will be working with Toolkit 4.1 (and earlier) contracts and conservation plans, see *Appendix C*.

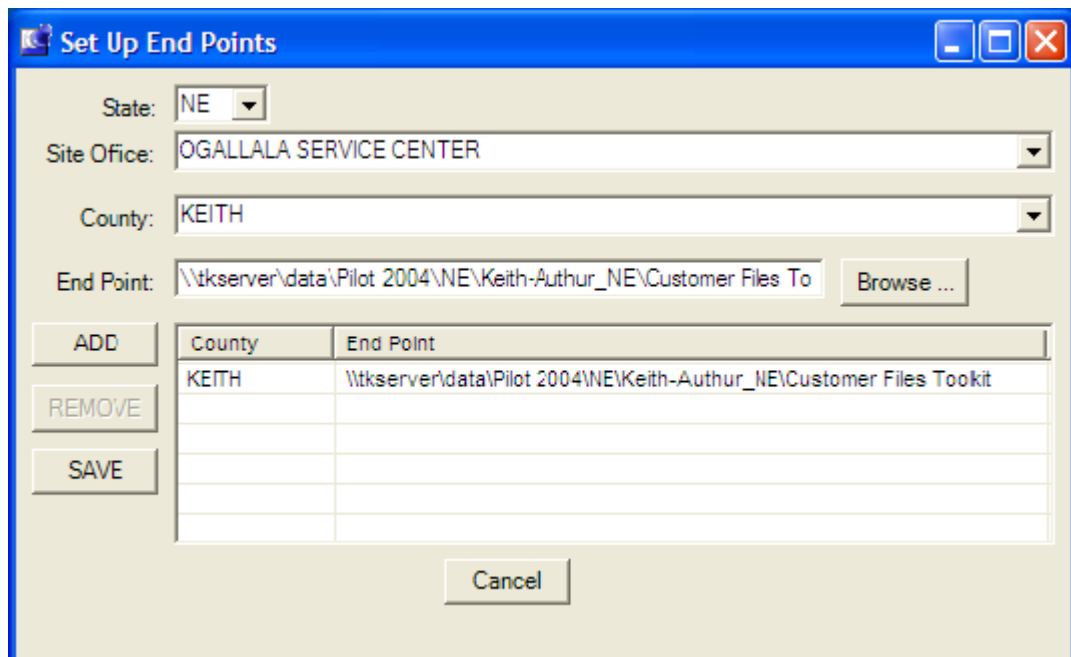
### 3.6. Register Endpoints

ITS System Administrators or a State Toolkit/GIS Coordinator with a Level 2 eAuthentication account use the Endpoint Utility to register field office sites to the Customer Files Toolkit folder (or subfolder) on a field office server. This task must be performed for every server where Toolkit 2004 customer folders will be stored.

**Note:** Endpoints need only be registered once for each field office server. (This process is not completed for each workstation, only for each server.) If you are reinstalling Toolkit 2004, skip to Section 3.7.

To run the utility and register the endpoints, follow these instructions.

1. Using Explorer, browse to:  
**C:\Program Files\USDA\Toolkit5\Utilities\SetUpEndPoints.exe.**
2. Double-click **SetUpEndPoints.exe**.
3. When the eAuthentication window is displayed, enter your **User ID** and **Password**.
4. Click **Login**.



5. When the Endpoint Utility dialog box appears, select your **State** from the drop-down list.
  - A list of site offices is populated.
6. Select a **Site Office** from the Site Office drop-down list. Select a **County** from the County drop-down list.
  - Previously set endpoints will be displayed for this site.

7. Select an endpoint by:
  - Typing in the server path to the Customer Files Toolkit folder location as the Endpoint (i.e., \\<server name>\data\Customer Files Toolkit), and clicking **Add**, or
  - Clicking on the **Browse** button (folder icon) to browse to the server on the network and selecting the **Customer Files Toolkit** folder to create the endpoint.

*See Appendix A for example endpoints for the Toolkit site servers.*
8. The server path is displayed in the dialog box (i.e., \\<server name>\data\Customer Files Toolkit).
9. If the endpoint already exists, a message is displayed. Click **OK**.
10. Click **OK** at the bottom of the Endpoint Utility dialog box to register the endpoint.
11. The Endpoint Set message will appear.
12. Click on **Yes** to repeat this process for any other server where customer folders will reside. Click on **No** to exit the Endpoint Utility dialog box.
13. To delete an endpoint, select the server path displayed in the dialog box and click on the **Remove** button.

For additional information, see the “Registering Endpoints” section under Getting Started in **Toolkit User Help**.

### 3.7. Install Check In Wizard

#### 3.7.1. Users Uninstall All Instances of Check In Wizard

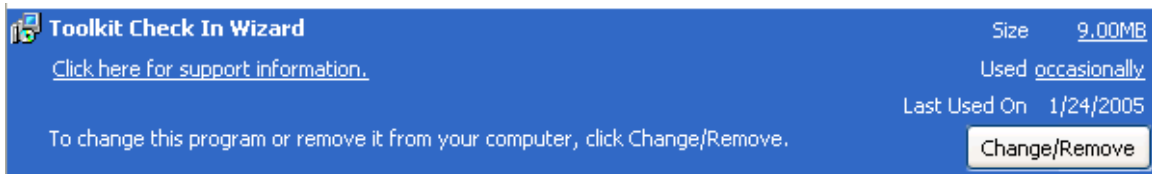
Each installation of Check In Wizard on a given workstation must be uninstalled by the user before the ITS System Administrator can install the new version of Check In Wizard.

---

**Note:** Each user of Check In Wizard on a given workstation must perform the following steps to uninstall his/her instance of Check In Wizard.

---

1. Log on under your user account.
2. Close all Windows applications.  
Click the **Start > Panel > Add/Remove Programs**.
3. Find and select **Toolkit Check In Wizard** in the list of software.



4. Click the **Change/Remove** button.
5. Several informational messages are displayed as the InstallShield wizard loads.
6. When the **Welcome to the InstallShield Wizard** dialog window displays, follow the directions to remove the software.
7. If you are unable to successfully uninstall your instance of Check In Wizard from the workstation, you will need to follow the instructions in Section 3.7.2 with the assistance of your ITS System Administrator.

#### 3.7.2. Apply Check In Wizard Uninstall Fix

We recommend that the user and the ITS System Administrator perform the instructions in this section together.

If the removal of Check In Wizard fails, some key components of the installation package will be missing. This will prevent Install Shield from successfully uninstalling Check In Wizard. To resolve this problem, a file named "CheckInWizard\_Uninstall\_Fix.exe" is included in the installation package for Toolkit 2004 v5.0.

To restore the missing components, follow these instructions:

1. Navigate to the **XP\NRCS\Toolkit Check In Wizard\Client\1\_35\pkg** directory of the workstation in the Windows explorer window.
2. Double-click on **CheckInWizard\_Uninstall\_Fix.exe**.
3. The necessary files will be automatically extracted to the workstation.
4. Repeat the instructions in section 3.7.1 to uninstall Check In Wizard.

### 3.7.3. System Administrators Install Check In Wizard

Once all users have uninstalled all instances of Check In Wizard on a workstation (according to the instructions in Section 3.7.1 and 3.7.2), the ITS system administrator can install the Check In Wizard using the instructions below.

Depending on the choice made in Section 3.5 (i.e., to install from a server or from a drive on a local workstation), proceed to section 3.7.4 or 3.7.5.

- **From a server** – Section 3.7.4 will guide you through a server-based installation. The instructions assume that you will use drive **Z:\** and that it is mapped to the Server's **G:\workstation** folder before you continue.
- **From a drive on the local workstation, CD drive, or USB device** – The instructions in Section 3.7.5 assume that you do not have a server and will be installing the application locally.

---

**Note:** This is not a silent install. After starting the installation below, you will need to follow the prompts to complete the installation.

---

### 3.7.4. Server-based Installation

To install the Check In Wizard on a workstation in which Toolkit 4.1 has never been installed, complete the following steps.

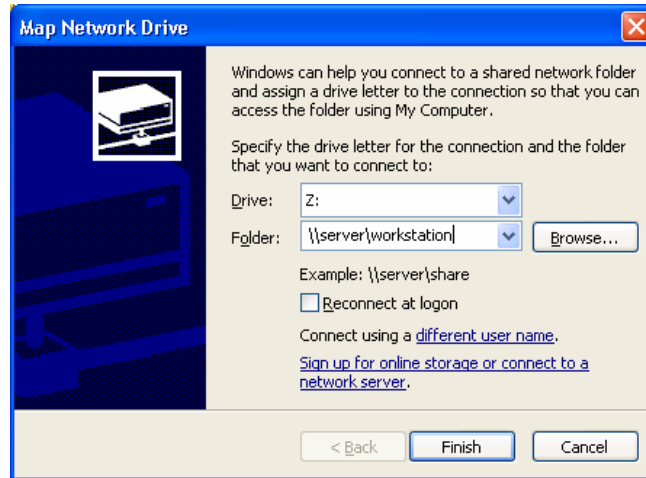
1. Log in with an account that has **administrative privileges** to complete these tasks, if you're not already logged on.

---

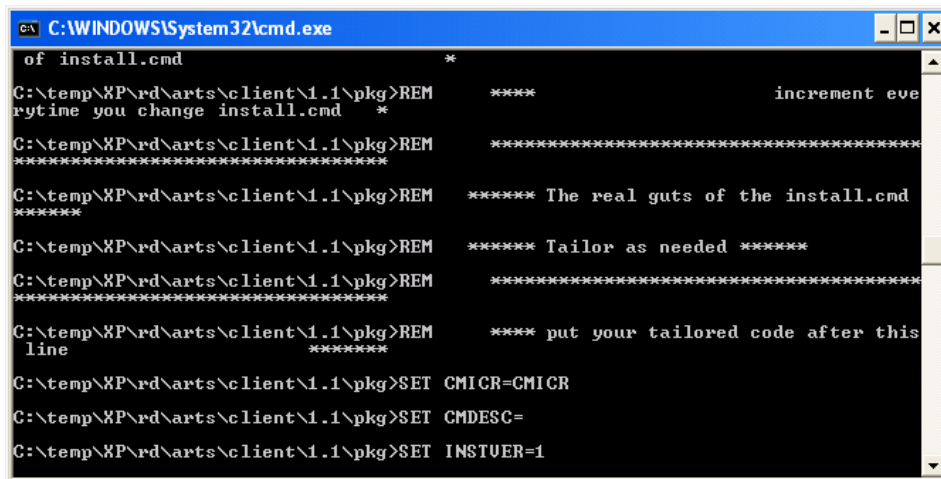
**Note:** If you have already mapped a drive (step 3.4.1), you'll need to open Explorer (right-click **Start**, click on **Explore**) and skip ahead to step 5.

---

2. Right-click on **My Computer**, then click on **Map Network Drive**.
3. Select **Z** for the drive letter and type: **\\Server\workstation** for the folder location, where **Server** is either the Server IP or Server Name.



4. Make sure there is **no** check mark next to **Reconnect at Logon**, then click on **Finish**. You now have a drive mapped to the Server where the Supplemental Applications reside. The workstation exploring screen will appear
5. To initiate the installation, either:
  - Navigate to the **XP\NRCS\Toolkit Check In Wizard\Client\1\_35\_Administrator\** subfolder in the workstation exploring screen and double-click on **install.cmd**, or
  - Close out the exploring screen, click on **Start > Run**, browse to **Z:XP\NRCS\Toolkit Check In Wizard\Client\1\_35\_Administrator\** select **install.cmd**, click **Open**, then click **OK**.
6. A DOS window will appear and run several scripts automatically.



7. The InstallShield welcome screen will appear.
8. Click **Next**.
9. Wait while the InstallShield performs the installation.

---

**Note:** If an error occurs, a message is displayed. Click **OK** and **Finish** to exit. Send email to [toolkitsupport@itc.nrcs.usda.gov](mailto:toolkitsupport@itc.nrcs.usda.gov), or contact the help desk for assistance.

---

10. Upon successful completion, the wizard will display a message confirming that the installation was successful. Click **Finish** to exit.
11. To install the optional Toolkit Utilities software, proceed to the Section 3.8.

### 3.7.5. Installation from the Workstation Hard Drive, CD, or USB Device

If you performed the steps in Section 3.7.1, you do not need to complete this section.

1. Log in with an account that has administrative privileges to complete these tasks.
2. Click **Start > Run** then **Browse** or type in:  
[Drive]: XP\NRCS\Toolkit Check In Wizard\Client\1\_35\_Administrator\.

---

**Note:** [Drive] is the location of your unzipped files (i.e., C:\temp, RW-CD, or USB Drive letter).

---

3. Select **install.cmd** and click **Open**.
4. Click **OK**.
5. A DOS window will appear and run several scripts automatically.

```

C:\WINDOWS\System32\cmd.exe
of install.cmd
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** increment eve
C:\temp\XP\rd\arts\client\1.1\pkg>REM *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** The real guts of the install.cmd *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** Tailor as needed *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** put your tailored code after this
line *****
C:\temp\XP\rd\arts\client\1.1\pkg>SET CMICR=CMICR
C:\temp\XP\rd\arts\client\1.1\pkg>SET CMDESC=
C:\temp\XP\rd\arts\client\1.1\pkg>SET INSTUER=1
  
```

6. The InstallShield welcome screen will appear.
7. Click **Next**.
8. Wait while the InstallShield performs the installation.



---

**Note:** If an error occurs, a message is displayed. Click **OK** and **Finish** to exit. Send email to [toolkitsupport@itc.nrcs.usda.gov](mailto:toolkitsupport@itc.nrcs.usda.gov), or contact the help desk for assistance.

---

9. Upon successful completion, the wizard will display a message confirming that the installation was successful. Click **Finish** to exit.
10. To install the optional Toolkit Utilities software, proceed to the Section 3.8.

### 3.7.6. Remove Check In Wizard from the Workstation

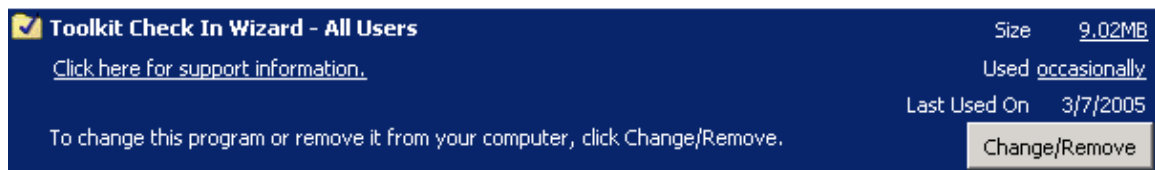
In the future, you may wish to remove this application from the workstation or laptop. To remove the Check In Wizard from the client machine, follow the steps below.

---

**Note:** The instructions in this section need to be performed by an ITS System Administrator.

---

1. Log on under your administrative account.
2. Close all Windows applications.
3. Click the **Start > Panel > Add/Remove Programs**.
4. Find and select **Toolkit Check In Wizard** in the list of software.



5. Click the **Change/Remove** button.
6. Several informational messages are displayed as the InstallShield wizard loads.
7. When the **Welcome to the InstallShield Wizard** dialog window displays, follow the directions to remove the software.

### 3.8. Install the Toolkit Utilities

Only ITS System Administrators can install the Toolkit on a workstation. Two utilities are included in the installation package: the Export Layout Utility and the APR Utility.

Depending on the choice made in Section 3.5 (i.e., to install from a server or from a drive on a local workstation), proceed to section 3.8.1 or 3.8.2.

- **From a server** – Section 3.8.1 will guide you through a server-based installation. The instructions assume that you will use drive **Z:\** and that it is mapped to the Server's **G:\workstation** folder before you continue.
- **From a drive on the local workstation, CD drive, or USB device** – The instructions in Section 3.8.2 assume that you do not have a server and will be installing the application locally. The instructions also assume that you have already extracted the files using the instructions provided in Section 3.4.2.

---

**Note:** This is not a silent install. After starting the installation below, you will need to follow the prompts to complete the installation.

---

#### 3.8.1. Server-based Installation

---

**Note:** ArcView 3.3 must be installed on the workstation before the utilities can be installed.

---

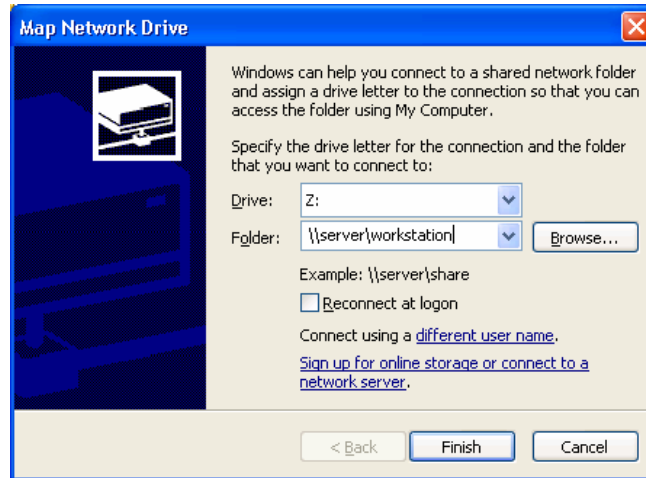
1. Log in with an account that has **administrative privileges** to complete these tasks, if you're not already logged on.

---

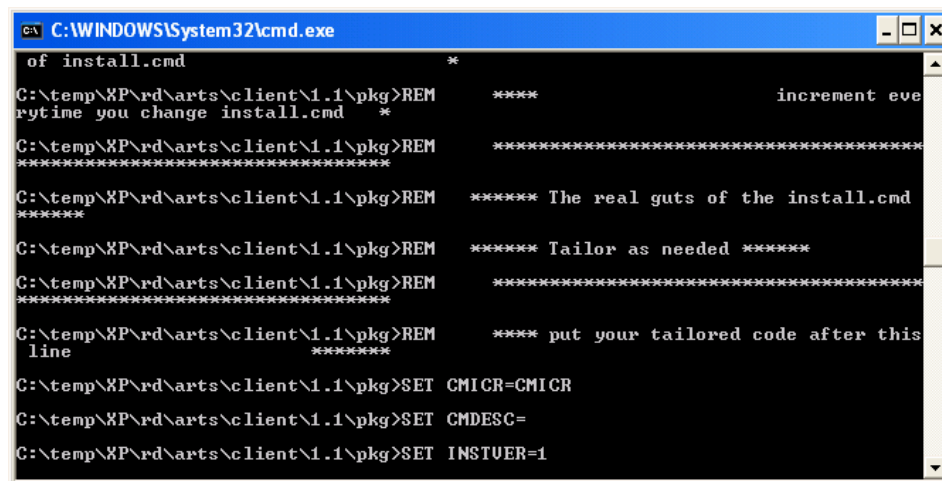
**Note:** If you have already mapped a drive (step 3.4.1), you'll need to open Explorer (right-click **Start**, click on **Explore**) and skip ahead to step 5.

---

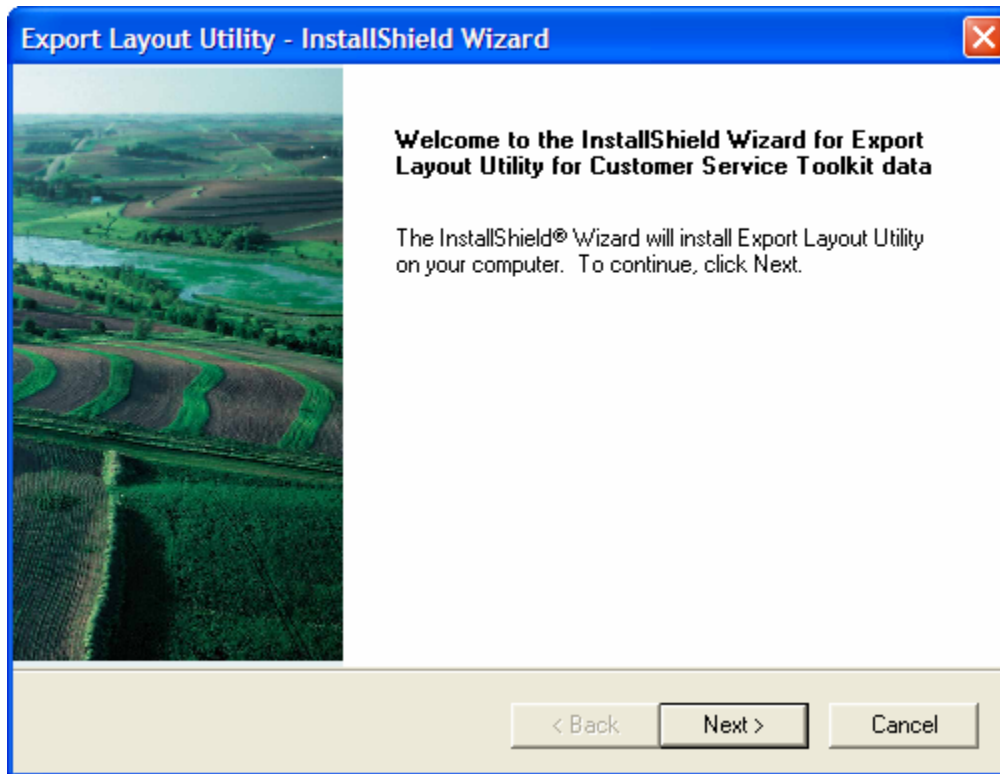
2. Right-click on **My Computer**, then click on **Map Network Drive**.
3. Select **Z** for the drive letter and type: **\\Server\workstation** for the folder location, where **Server** is either the Server IP or Server Name.



4. Make sure there is **no** check mark next to **Reconnect at Logon**, then click on **Finish**. You now have a drive mapped to the Server where the Supplemental Applications reside. The workstation exploring screen will appear
5. To initiate the installation, either:
  - Navigate to the **XP\NRCS\CustomerServiceToolkit Utilities\Client\1\_09\** subfolder in the workstation exploring screen and double-click on **install.cmd**, or
  - Close out the exploring screen, click on **Start > Run**, browse to **Z:XP\NRCS\CustomerServiceToolkit Utilities\Client\1\_09\**, select **install.cmd**, click **Open**, then click **OK**.
6. A DOS window will appear and run several scripts automatically.



7. When the Toolkit InstallShield Wizard dialog window is displayed, click **Next**.

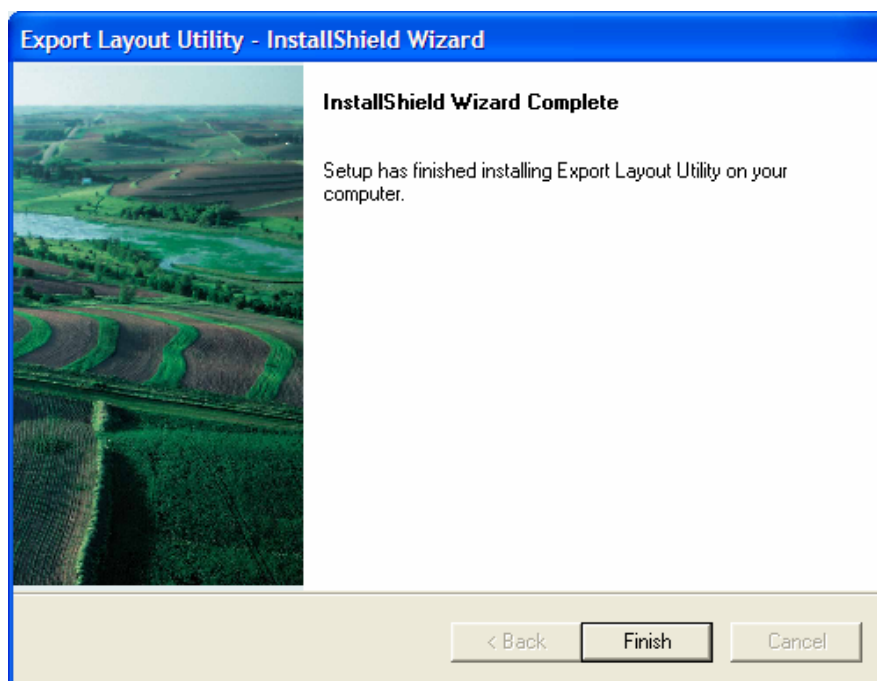


- When the installation is complete, click **Finish** to exit.

---

**Note:** In the event that an error was encountered when installing the APR Utilities, please send email to [toolkitsupport@itc.nrcs.usda.gov](mailto:toolkitsupport@itc.nrcs.usda.gov), or call the Help Desk.

---



### 3.8.2. Installation from the Workstation Hard Drive, CD, or USB Device

If you performed the steps in Section 3.8.1, you do not need to complete this section.

---

**Note:** ArcView 3.3 must be installed on the workstation before the utilities can be installed.

---

1. Log in with an account that has administrative privileges to complete these tasks.
2. Click **Start > Run** then **Browse** or type in  
**[Drive]:\XP\NRCS\CustomerServiceToolkit Utilities\Client\1\_09\**.

---

**Note:** **[Drive]** is the location of your unzipped files (i.e., C:\temp, RW-CD, or USB Drive letter).

---

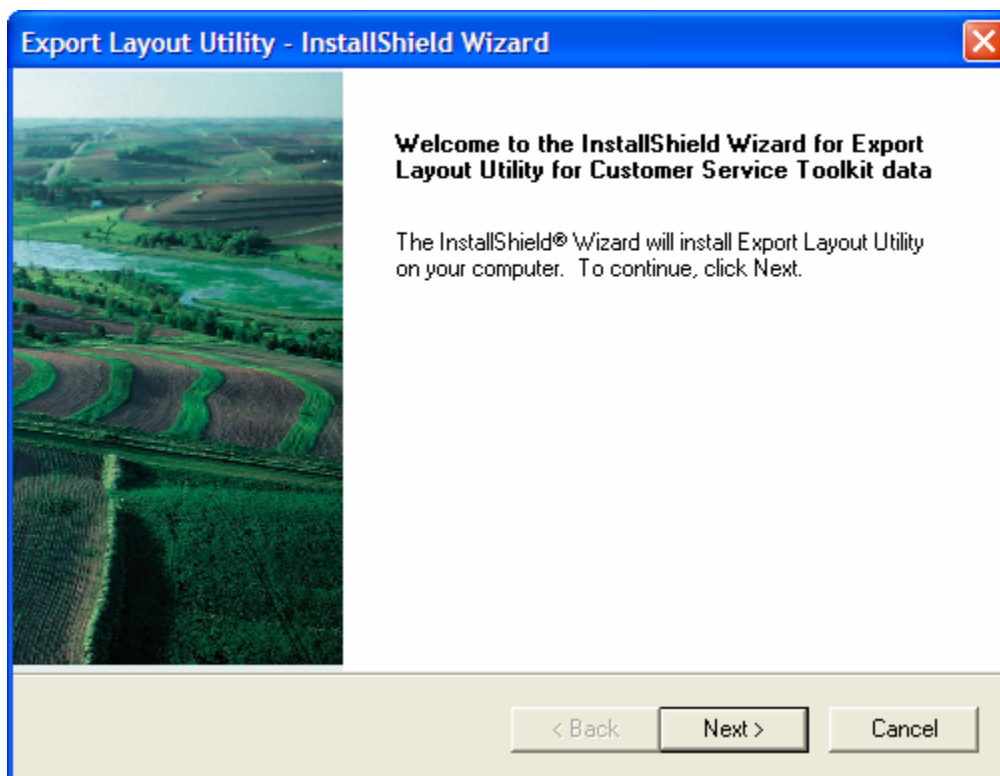
3. Select **install.cmd** and click **Open**.
4. Click **OK**.
5. A DOS window will appear and run several scripts automatically.

```

C:\WINDOWS\System32\cmd.exe
of install.cmd *
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** increment eve
rytime you change install.cmd *
C:\temp\XP\rd\arts\client\1.1\pkg>REM *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** The real guts of the install.cmd
*****
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** Tailor as needed *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM *****
C:\temp\XP\rd\arts\client\1.1\pkg>REM ***** put your tailored code after this
line *****
C:\temp\XP\rd\arts\client\1.1\pkg>SET CMICR=CMICR
C:\temp\XP\rd\arts\client\1.1\pkg>SET CMDESC=
C:\temp\XP\rd\arts\client\1.1\pkg>SET INSTUER=1

```

6. When the Toolkit InstallShield Wizard dialog window is displayed, click **Next**.

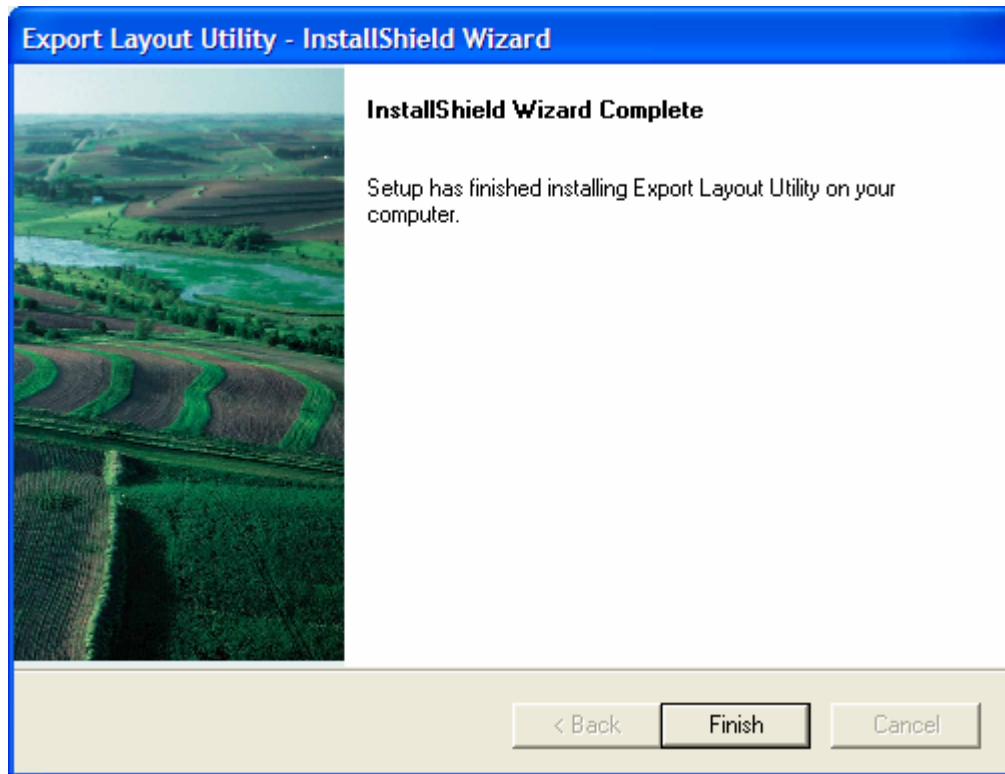


7. When the installation is complete, click **Finish** to exit.

---

**Note:** In the event that an error was encountered when installing the APR Utilities, please send email to [toolkitsupport@itc.nrcs.usda.gov](mailto:toolkitsupport@itc.nrcs.usda.gov), or call the Help Desk.

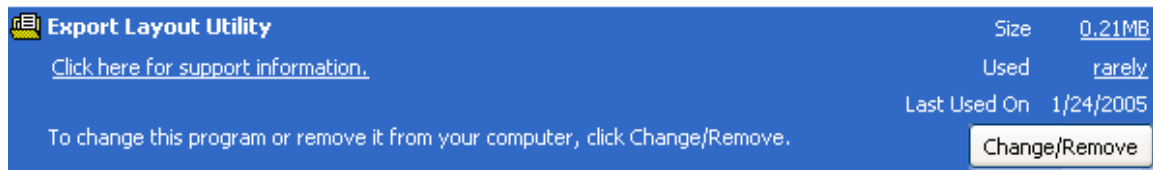
---



### 3.8.3. Remove Toolkit Utilities

In the future, you may wish to remove this application from the workstation or laptop. To remove the Toolkit Utilities, including the Export Layout Utility and the APR Utility:

1. Log on as a system administrator.
2. Close all Windows applications.
3. Click the **Start > Panel > Add/Remove Programs**.
4. Find and select **Export Layout Utility** in the list of software.



5. Click the **Change/Remove** button.
6. Several informational messages are displayed as the InstallShield wizard loads.
7. When the **Welcome to the InstallShield Wizard** dialog window displays, follow the directions to remove/repair the software.

### 3.9. Install Soil Data Viewer

This section provides instructions for installing the Soil Data Viewer. The Toolkit 4.1 installation package and the Toolkit 4.1 Installation Guide are available at:

- <http://www.itc.nrcs.usda.gov/toolkit/SoilDataVwr.htm>

Soil Data Viewer is bundled with Toolkit v4.1. Although you need to use the Toolkit 4.1 InstallShield Wizard to install Soil Data Viewer, you will not be installing Toolkit4.1 on the workstation.

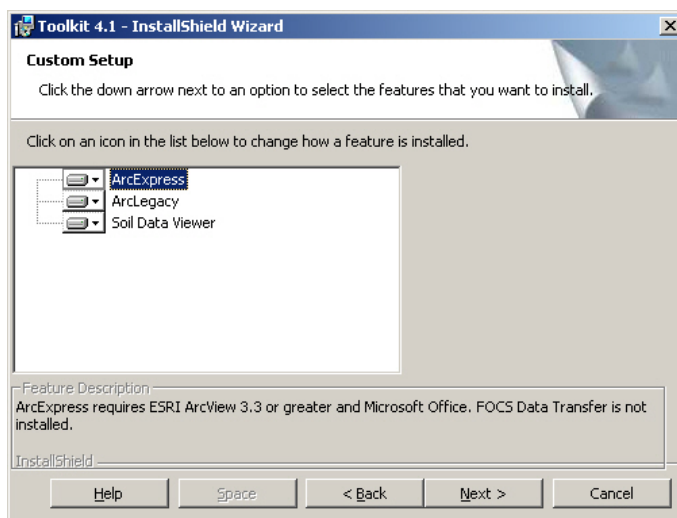
---

**Note:** ArcView 3.3 must be installed on the workstation before the Soil Data Viewer can be installed.

---

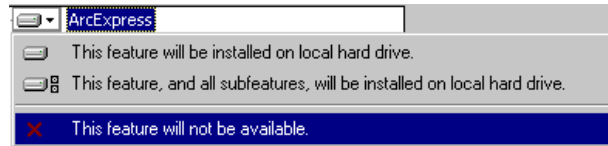
To install the Soil Data Viewer, follow these instructions.

1. Download and unzip the Toolkit 4.1 installation package and the Installation Guide from <http://www.itc.nrcs.usda.gov/toolkit/SoilDataVwr.htm>.
2. Review the installation prerequisites for Soil Data Viewer in the Installation Guide.
3. Follow the instructions provided in the Installation Guide, until you arrive at the Custom Setup dialog window. The *Custom Setup* dialog window (shown below) lists three installation options: ArcExpress, ArcLegacy, and Soil Data Viewer.



4. To install only the Soil Data Viewer, you will need to disable two options in this dialog window (ArcExpress and ArcLegacy) and enable the Soil Data Viewer.
5. To disable the installation option for ArcExpress:
  - Click on **ArcExpress**.
  - Click the down arrow next to **ArcExpress** to display the choice list.
  - Select **This feature will not be available**.



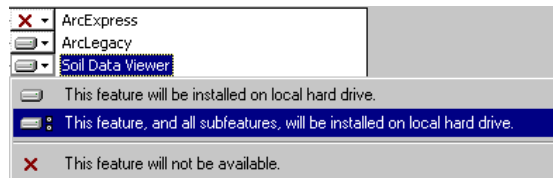



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**Note:** A red **X** should appear next to the down arrow for that component.

---

6. Repeat the above step to disable the installation option for ArcLegacy.
7. To enable the installation option for Soil Data Viewer, select **Soil Data Viewer**.
  - Click the down **arrow** next to **Soil Data Viewer** to display the choice list.
  - Select **This feature, and all subfeatures, will be installed on local hard drive**.



8. Continue the installation by following the prompts in the InstallShield Wizard, as described in the Installation Guide.

### 3.10. Install Toolkit on Remaining Workstations

To install Toolkit 2004 (and any optional software) on the remaining workstations, refer the instructions provided in sections 3.5-3.9. You will not need to perform the steps for registering Toolkit endpoints that are provided in Section 3.6.

### 3.11. Reinstall Toolkit 2004

This section provides instructions for reinstalling Toolkit 2004.

#### 3.11.1. Check In Customer Files Before Reinstalling Toolkit 2004

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**Note:** It is a recommended practice for Toolkit users to check in customer files on a regular basis. Some users routinely check in their customer files each day. Such a procedure helps prevent accidental loss of data due to hardware failure. By checking in the customer files, the latest work is saved to the NCPDB.

---

If the user is available when the ITS System Administrator is ready to reinstall Toolkit 2004, we recommend that the user check in all customer files before the software is reinstalled. However, this is not a requirement; the installation package allows the Toolkit 2004 to be installed with customer files checked out. When the reinstallation is complete, the customer files will still show as being checked out.

#### 3.11.2. Reinstallation Instructions

**Step One: *Check that the users have checked in their customer files (Optional)***

**Step Two: *Install Toolkit 2004***

Repeat the instructions for installing Toolkit 2004 and the optional software provided in Sections 3.5-3.9. You will not need to perform the steps for registering Toolkit endpoints that are provided in Section 3.6.

### 3.11.3. Remove Toolkit 2004

When reinstalling Toolkit 2004, the existing version of Toolkit will be removed from the workstation automatically by the installation package. You do not need to follow the instructions provided here. Toolkit 2004 can be manually removed from a workstation, as desired, by following the instructions included here.

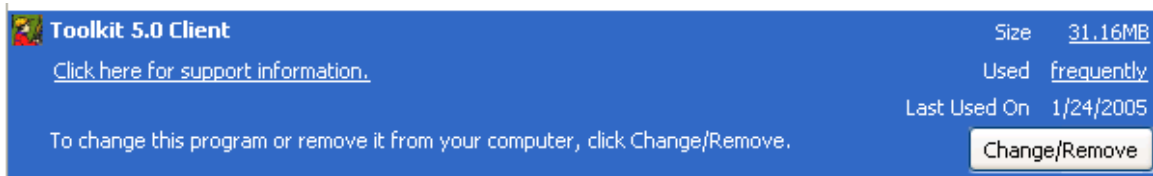
---

**Note:** Do not uninstall the ESRI Hot Fix (listed as 'NRCS ESRI QFE-DT-83-CQ00261837 ArcGIS SP3 patch') from any of the workstations. By design, the ArcGIS hot fix will not be uninstalled if Toolkit 2004 v5.0 is removed from the workstation.

---

To remove Toolkit 2004 manually, follow these instructions:

1. Log on to the workstation with an account that has administrative privileges.
2. Close all Windows applications.
3. Click the **Start > Panel > Add/Remove Programs**.
4. Find and select Toolkit 5.0 in the list of software.



5. Click the **Change/Remove** button.
6. Several informational messages are displayed as the InstallShield Wizard loads.
7. When the Welcome to the InstallShield Wizard dialog window displays, follow the directions to remove/repair the software.

## Appendix A: Endpoints

### Toolkit Site Endpoints

Toolkit site endpoints should be documented. As part of the preparation for installing Toolkit 2004 v5, the Toolkit/GIS coordinator should provide a list of counties and associated subfolder names to the ITS System Administrator to use for endpoint registration (see example table below for recording Toolkit endpoints).

State	State Office	County	Endpoint
SO	Office_Name	County A	\\<state office server>\data\Customer Files Toolkit\County_A
		County B	\\<state office server>\data\Customer Files Toolkit\County_B
		County C	\\<state office server>\data\Customer Files Toolkit\County_C

**Note:** *Customer folders from multiple counties may be located under the same Customer Files Toolkit folder.*

Update your endpoint documentation whenever Toolkit site endpoints are added, deleted, or modified.

## Appendix B: Hardware Requirements

### Hardware Requirements

Use the following table of recommended CCE platforms as a guide for selecting your hardware.

CCE Configuration	Model	Additional Memory Requirements
CCE021	2001 Dell C600 Laptop (IT)	No additional memory needed (already 512 MB)
CCE025	2001 Dell C600 Laptop	1-256 MB (256 MB PC100-SDRAM)
CCE026	2001 Dell OptiPlex GX240	No additional memory needed
CCE027	2001 Dell Precision Workstation 330	No additional memory needed (already 512 MB)
CCE037	2003 Gateway E4100 Mid-Range Workstation	No additional memory needed
CCE038	2003 Gateway E450 Laptop	No additional memory needed (already 512 MB)
CCE039	Gateway E-4100 High-End Workstation	No additional memory needed (already 1024 MB)
CCE044	HP Compaq dc5000 Mid-Range Workstation	No additional memory needed (512MB expandable to 3GB)
CCE045	HP Compaq dc7100 High-End Workstation	No additional memory needed (1GB expandable to 2GB)
CCE046	HP Compaq nc6000 Notebook	No additional memory needed (1GB)

### Notes:

- The 2003 High-End Gateway workstations do not have the Open GL driver installed as part of the base XP software image, which is required by ArcGIS and must be installed. At this time, only the E4100 Gateway High-End workstations have been performance tested.
- The CCE Project has purchased workstations in FY 2004 for the Service Center Agencies to replace those originally acquired in FY 1999 and to meet current business requirements of the agencies. See entries for CCE044 through CCE046 in the above table for configuration information.

## *Appendix C: Using Toolkit 4.1 Contracts and Conservation Plans*

The Toolkit 4.1 contracts and conservation plans are Excel spreadsheets that include code to access the **standspec.mdb** located in the **C:\Field\_Office\_Tech\_Guide\Section\_IV** folder. This code executes when the user clicks either the **Make Plan** or **Make Contract** button. A contract/plan will not be created if the **standspec.mdb** file cannot be found in the expected location.

Users who will be working with Excel contracts and conservation plans developed in Toolkit 4.1 and earlier versions will need a **standspec.mdb** file in their **C:\Field\_Office\_Tech\_Guide\Section\_IV** folder. To properly configure the workstation, copy the **standspec.mdb** file from F:\FOTG (on the server) to the **C:\Field\_Office\_Tech\_Guide\Section\_IV** folder.

A **standspec.mdb** file is not needed in the **C:\Field\_Office\_Tech\_Guide\Section\_IV** folder if the **Make Plan** or **Make Contract** feature will not be used.

