

Lesson Plan: Upload Bulk Obligation Package to the Conservation Desktop (CD) Document Management (DM) system

Requirements: User is logged in to the CD and has selected a default Service Center. User has a CD role and a Toolkit role that includes the Service Center where the case file is located. The Decision Maker and the Agreement number used to create the agreement items for the RCPP18 application are known.

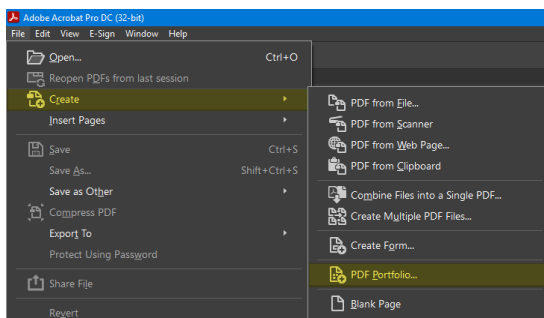
Objectives: At the end of this lesson, you will be able to:

- Combine multiple files using Adobe Acrobat
- Upload a file linked to a CD Agreement number
- Retrieve and View a previously uploaded document.

Note: *Additional information on the use of CD-DM can be found in Section 2.4 Documents in the CD Comprehensive User's Manual. (Access the Manual by clicking Help in Conservation Desktop)*

Combine the Files using Adobe Acrobat

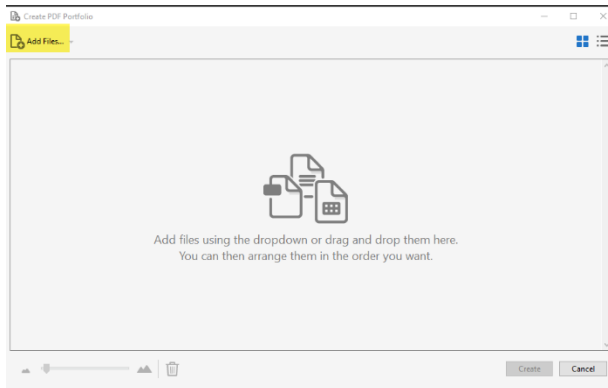
1. Open Adobe Acrobat from the Windows Jewel/Start menu
2. From the File menu select Create → PDF Portfolio



Note: *You may also combine your files into a Single PDF. However if you choose this option, you need to ensure the check marks and original signatures in the separate files are retained after they have been combined. One way to do that is to Print them to PDF prior to using the combine functionality in Adobe.*

3. Click **Add files** or drag and drop them from Windows Explorer

Attachment B



4. When you've added all the required files, select Create.
5. A file including the name 'Portfolio' will be created. Click on that tab then using the File menu save it with the following naming convention:
<Application Number>_RCPP18_Obligation_Package

Upload the Combined File to the CD-DM

1. Log into CD
2. Click Documents on the main CD Toolbar

* = required field

Document Category
Other

* Document Type
Other Agreement

* File To Upload
[Choose File] No file chosen 912D37210010_Obligation_Package.pdf

* Document Title
912D37210010_Obligation Package

Comments

Internal View Only

Agreement Search

* Source Number
CD 912D37210010 SEARCH

Agreements (1)

Number	Decision Maker	Program	Fiscal Year	Service Center	County	State
912D37210010	BOB	RCPP18	2021			PA

* Participant(s):
Select all that apply (at least one must be selected)

<input checked="" type="checkbox"/>	Name	Decision Maker	Street Address	City	State	Zip Code	Phone
<input checked="" type="checkbox"/>	BOB I	<input checked="" type="checkbox"/>					

Assistance Request:
Select one

ID	Name	Type	Date	Status	Comments
No records to view					

CANCEL UPLOAD

3. **NEW** Make the following selections:
 - a. Category – Other
 - b. Type – Other Agreement

Attachment B

Note: *Obligation packages uploaded using a document type of “Other- Plan” following the FY21 bulletin prior to the posting of the FY22 bulletin do not need to be uploaded again (although you may wish to do so to avoid confusion and make the document easier to find in the future).*

4. Click **Choose File** then navigate to and select the Obligation Packet document file
For the document title enter: <Application Number>_RCPP18_Obligation_Package
5. For Agreement source select **CD** then enter the Agreement number and click **Search**
6. For Client Name enter the Decision Maker’s name then click **Search**.
7. Click the radio button in front of the appropriate Agreement
8. Select the appropriate Participant.
9. Then select **Upload**.

Note: *This process described what is called an “out of context” document upload. See the note at the end of the lesson plan for information about uploading the document using the “in context” upload process.*

View or Download the Obligation Package using CD-DM

1. Log into CD
2. Select the **Programs** button on the CD toolbar, then select **Manage CD Applications and Agreements**.
3. Select the appropriate Fiscal Year and Program then enter the application number in the box then click **Search**

Note: *Make sure the correct state and service center are included your preferences or you will get no results.*

Search Applications and Agreements Legend ? x

Select at least State and Fiscal year or Program and Fiscal Year. Use Advanced Search for multi-select.

Fiscal Year: 2021	Program: RCPP18	Client Name:
State: All States	Program Component: All	Application/Agreement Number: 912D37210010
Service Center: All Service Centers	Enrollment Type: All	Status: All
	Sign Up Number: All	Historically Undeserved Category: All
		Phase: All
		Priority: All

[Advanced Search Options](#)

Search Results


Applications and Agreements (2) Legend Export Columns

Program	Program Component	Enrollment Type	Fiscal Year	State	Service Center	County	Duration	Estimated Cost	Funding Level	Priority	Agreement Number	Phase	Applicant	Status	Actual Cost	Actions
Regional Conservation Partnership Program - 2018	Classic	Land Management/Rental	2021				--	\$90000.00	--	--	912D37210010	Agreement	BOB H	Active	\$88050.00	


Attachment B

4. Click on the appropriate agreement number to load the Decision Maker, Case File, Practice Schedule, and Agreement into the Table of Contents (TOC)
5. Click on the Practice Schedule name.
6. Click on Documents in the CD toolbar.
7. Notice the Document View shows the schedule. Select Agreement - <Application Number>

The screenshot shows the 'Document Management' interface. A dropdown menu is open, listing various document categories. The 'AGREEMENT: 912D37210010' option is highlighted. The main area shows 'Status: Active' and 'Decision Maker: BOB H ANDERSON'. Below the menu, there are buttons for 'View Selected', 'Download Selected', and 'Upload New Document'. A table with columns for Title, Version, Client(s), Agreement, Schedule Info, Last Upd., Signature Types, Internal Only?, and Actions is visible, but it is currently empty with the message 'No documents found'.

8. Select  to download the appropriate document. (Preview does not function well with Adobe Portfolios.)

The screenshot shows the 'Document Management' interface with the 'AGREEMENT: 912D37210010' selected. The 'Document Collection' is set to 'Document List'. The table below shows one document entry:

<input type="checkbox"/>	Document Type	Title	Version	Client(s)	Agreement	Schedule Info	Last Upd.	Signature Types	Internal Only?	Actions
<input type="checkbox"/>	Other Agreement	912D37210010_Obligation Package	1.0	BOB [REDACTED]	Nbr : 912D37210010	--	04/06/2022	--	<input checked="" type="checkbox"/>	

Note: *The obligation package could also be uploaded by clicking **Upload New Document** from this screen. The system would retain the Decision Maker, Schedule, and Agreement information. The user would only need to select the document category and document type before uploading the document.*