Lesson Plan: Create a New Cost List in Conservation Desktop

Requirements: The user is logged in to the Conservation Desktop training site and has completed the previous lesson plans.

Rationale: Cost Lists can be created in CD to be used for non-ProTracts agreements. Practice components can be created, edited or imported into the cost list.
Roles that can perform lesson plan: CD-FA State Business Tools Coordinator/State Programs or CD-TA State Business Tools Coordinator/Toolkit State Role Grantor. Designated Conservationist can create a Service Center cost list.

Objectives: At the end of this lesson, you will be able to:
- Import a cost list
- Add practices to a cost list

1. Select **Data Configuration** located in the user's profile on the CD Toolbar.
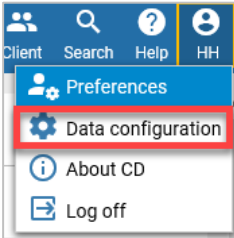
2. Select **Add New**.

3. In the New Cost List menu, select the Program (**ACEP-WRE**), State, and Statewide, Fiscal Year(s), and select **Save and Add Components**.

4. Verify the Cost List Details are displaying the selected State, Program, Service Centers, FY, default cost list name (State, FY, Program, Number) and status is Draft.

5. Change the cost list name to include state abbreviation, fiscal year, and program code.

6. Set the Start Date for beginning of the fiscal year, October 1, 2020., and select APPLY

7. Select 📥 Import

8. Browse, select the **ACEP-WRE Cost List** created for FY 2021 and select Open.
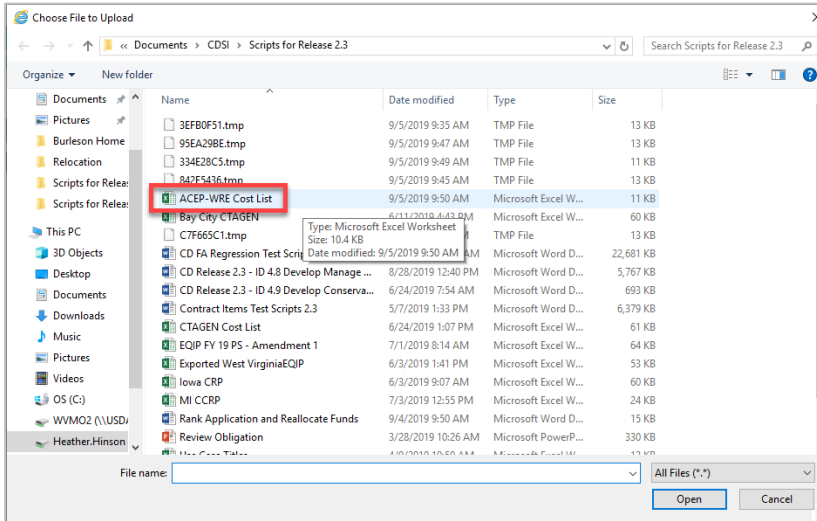
9. Verify components are imported. The blue folder icons indicate the components have imported successfully but haven't been saved.
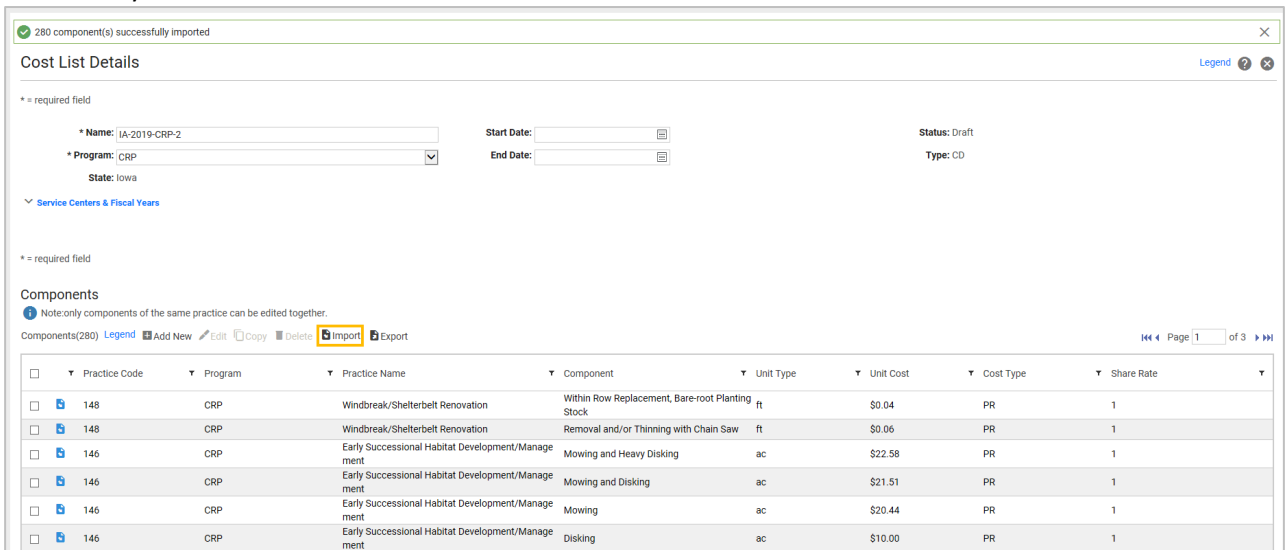
10. To add a practice to a cost list, select **Add New**.

11. Select the Practice, enter in a component name, verify **unit type**, enter verify the **Share Rate,** and select **Apply**.

Edit Component	⊠
Practice:	645 Upland Wildlife Habitat Management
Component:	Non Cost Share
Unit Type:	Ac ⌄ ↻ Refresh Unit Type
Unit Cost:	$0.00
Cost Type:	NC ⌄
Share Rate:	0

CANCEL   APPLY

12. The practice codes were added to the cost list, changes will show up at the top of the list.

Components

ⓘ Note: only components of the same practice can be edited together.

Components (28) Legend ⋮ Show ➕Add New ✏Edit ⧉Copy 🗑Delete 🖬Import 🖬Export Custom Units Manager   ⏮◀ Page 1   of 2 ▶⏭

☑	▼	Practice Code ▼	Practice Name ▼	Component ▼	Unit Type ▼	Unit Cost ▼	Cost Type ▼	Share Rate ▼
☐		LTAPTS	Acquisition Process - Title Search	Title Search	No	$500.00	PR	100
☐		645	Upland Wildlife Habitat Management	Non Cost Share	Ac	$0.00	NC	0
☐	🗋	657	Wetland Restoration	HU-CY Macro-Features	CuYd	$1.92	PR	100
☐	🗋	657	Wetland Restoration	HU-Crush Tile/Fill Ditch	CuYd	$4.33	PR	100

13. Scroll down and select **SAVE**.

14. The blue folder icons will be removed.

Components

ⓘ Note: only components of the same practice can be edited together.

Components (28) Legend ⋮ Show ➕Add New ✏Edit ⧉Copy 🗑Delete 🖬Import 🖬Export Custom Units Manager   ⏮◀ Page 1   of 2 ▶⏭

☐	▼	Practice Code ▼	Practice Name ▼	Component ▼	Unit Type ▼	Unit Cost ▼	Cost Type ▼	Share Rate ▼
☐		644	Wetland Wildlife Habitat Management	Cover	Ea	$20.00	PR	100
☐		644	Wetland Wildlife Habitat Management	Habitat	Ac	$15.00	PR	100
☐		645	Upland Wildlife Habitat Management	Development of Deep Micro-Topographic Features with Heavy Equipment.	Ac	$84.95	PR	100

15. Close the Cost List by selecting the **X** in the upper right-hand corner.

16. Select **X** in the upper right-hand corner to close out of Data Configuration.

Note: Users can access a Cost list training was provided on September 19, 2019, as part of the CD/CART Pretraining webinars, the recording is available on CD SharePoint at:
https://gcc02.safelinks.protection.outlook.com/?url=http://nrcs.adobeconnect.com/phu7md9isbb9/?OWASP_CSRFTOKEN%3D4c8da1d8df9cc0e30fef1d85fe7f7036e3275ebac6bd29c715e2dc6d2d3d3e58&data=02%7c01%7c%7c251b96177d97454b3b8d08d73d44b8d6%7ced5b36e701ee4ebc867ee03cfa0d4697%7c0%7c0%7c637045238153080697&sdata=ZUn1brUf7NyR1MPMZgSl8dA4jlU7LovJrFATXmfl2lU%3D&reserved=0.