Hello this is demo 2: Entering Case Data of the online training for LR2000. I'm Joe Mayless, a data analyst from the Arizona state office. I've been a data analyst for the past 3 years working as the land maintainer for Arizona. Prior to that, I was the data analyst spacial for Arizona BLM, working on the Bureau's one to one hundred thousand series surface management maps. I've also held the land law examiner position with the Bureau. All three of these jobs have a common thread to them. I utilize data from LR2000 and I entered data into LR2000 to perform tasks associated with the positions. The Bureau manages approximately 253 million acres; more than any other federal agency. This land, known as the National System of Public Lands is primarily located in 12 western states including Alaska. The Bureau with a budget of about 1 billion dollars also administers 700 million acres of subsurface mineral states throughout the nation. The BLM's multiple use mission is to sustain the health and productivity of the public lands for the use and enjoyment of present and future generations. The public lands make up about 13% of the total land surface of the United States and more than 40% of all the land managed by the federal government. With so much we have going on, you can see why it's important to have a system, LR2000, to assist in managing the data associated with BLM's lands. Management of the system via data entry is also important.

Properly entering data into LR2000 will save you time by returning accurate information and reports on your cases, allowing you to answer questions post to you by your managers and customers; both inside and outside customers. It will save you effort by assisting you and managing your workload by reports that can or may be run. It'll save you work by running reports that will alert you for cases on grants, permits, withdrawals to name a few that may be about to expire or that require periodic review. With that said, let's look at the purpose of this demo. Purpose of this presentation is to demonstration how to enter a new case into case recordation. Now that you know the purpose, let's take a look at what we will be covering. In this demo I will demonstrate to you how to access LR2000 then I'll show you how to enter the following case data; serial number, case type in acreage, customer details, location details, action details and other applicable info. Now that you know what we will be covering, let's begin by learning how to access LR2000.

Now let's look at how we gain access to the BLM's application security system or BAS, which will allow us to enter data into LR2000. If you don't have access to BAS you'll need to fill out form 1260-12 to request access. You may request the form from your Information Technology Security Manager. Follow the instructions that are on the form. Once you have BAS permission and are ready to enter case information into LR2000, go online to lr2000.blm.gov. The LR2000 home page will appear. A short narrative on what's available in LR2000 is present; user guides are also available for your use; click on transactions to get started. After you click on transactions a log in screen appears. Type in your user name like you do to log on to your work computer. Your password will be the same as the one you use to log onto to your work computer. When your work computer password changes; your password to BAS will automatically change. After filling in the required information, click on log in.

Depending on your permissions in BAS, your screen will look similar to this. You would normally click on LR2000 production, but for this demonstration we'll be utilizing the test/training database. Next click on: click here to enter. The screen is time sensitive; you must proceed through this screen in the timely fashion, for security reasons, or you will be taken back to the login screen to start the process again. Next insure the state you are working in is shown correctly in the state region section then click on the log in button. Lastly, read and understand the IT security notice page then click on the continue button on the bottom right hand side of the screen. When you enter through BAS, the BLM application security system and click on case recordation new to create your new case; here's what the screen will look like. Before entering any data into your case, make sure you check the national data standards which pertain to the case type you are about to work on. This information is available from the Corporate Meta-Data Repository, otherwise referred to as the CMR. Please refer to demo 1 for more information on the CMR. Also perform your status checks, looking at your MTPs, the LLD database and insure your costumer is in the customer database before you proceed. Now that you know how to access BAS and LR2000 let me now demonstrate how to enter case data beginning with header details.

The header details consist of case type, acres, commodity code and case file jurisdiction. Case type codes are based on the titles and the code of federal regulations. For public lands this is title 43. Cases that begin with a case type 2 are lands cases. Those that begin with 3 are mineral type cases. For our demo; the example we'll use is an application for a right-of-way across BLM land. The applicant is AT&T, which has an office out of Rancho Cordova, California. The road consists of 5 acres. We know lands cases start with two and that right-of-ways fall under section 2800 of the CFR. So we'll enter 28 under the case type and we'll utilize the look up button to help us out. Only case types that begin with 2800 appear. Right now the list is sorted by code. We can also sort the list by meaning. If you remember; we said it was a right-of-way for a road across BLM land. So we will scroll through and find right-of-way for road and use the select button to choose that selection. Now we'll move on to the acres field. From the application we also see that it's 5 acres. We will manually enter that in. The system will zero fill to up to 3 decimal places. For our commodity portion of the case; it's very important to use the proper codes when entering data into your case. Failure to do so may return erroneous information or result in insufficient, inaccurate reports. Commodity codes differ from case type to case type so be careful. Consult demo 1: CMR to learn more on how to look up the data standards on commodity codes. For our example; we said we had an application for a road right-of-way. The data standards tell us that there are 7 commodity codes that are appropriate for rights-of-way cases. Those include energy, non-energy, oil and gas, fiberoptic, wind, solar and interstate energy, and our example of the appropriate commodity code is non-energy facility which is code 971. Case disposition allows the status of the case to be viewed. The most common dispositions are pending, authorized and closed. Disposition of a case is set by the action codes that are entered. It is not manually entered. Action code 124, application received, would set a case to pending as an example. Action code 307, right-of-way granted / issued, would set the disposition as authorized. Pay close attention to the codes that are being entered and when they are entered as the disposition should be accurately reflected in the current status of the case. Case follow jurisdiction identifies which office has the lead or physical custody of the case file. Normally an optional field; this field is mandatory on rights-of-way cases, leases and permits and mineral material cases. If you know the code you can enter it. Otherwise choose the look-up feature for some help. You will need to know part of the office code; such as LL followed by your state. For our demo we have an application for a right-of-way in Arizona that falls within the jurisdiction of the Tucson field office. We entered LLAZ; I click on the look up button, I scroll through the list and I find the Tucson field office I select that.

Now that we know how to enter header details lets look at customer details. When a new customer or proprietor needs to be entered into the LR2000 system; send a note to your state office individual assigned to perform the data entry into the customer database. They will enter your new customer for you into the database. In our demonstration we received an application from AT&T Wireless in Rancho Cordova, California.  Once your new customer has been added to the customer database; use the look up button to locate your customer.  So you'll want to enter in partial entry of your proprietor into the look up.  Now I see several AT&T Wireless companies that I could choose from, but we know it's out of Rancho Cordova, California.  I would click on that and then hit the select button.  Next we'll talk about our interest relationship.  Put the cursor in the interest relationship field and again utilize the look up button.  Here we find a complete list of options to fit the case that we are working on.  We will review the list and we know that in this case they are the applicant; so we will highlight that and choose select.  Finally we need to choose our percent of interest for the case.  This figure may be split up several ways if you should have more than one applicant or party in an application or patent, but for our example we will put in a hundred percent as a hundred percent should tally up in all cases.

Now that I've entered customer details, let's look at how to enter location details.  Location details consist of meridian code, township, ranger, section, survey type, survey number, survey suffix, subdivision and case land agency.  The meridian code is a two digit code.  I could place my curser in the meridian and choose the look up button and I would see all of the meridians listed from my state.  I know that from my application information that it falls in the Tucson field office jurisdiction, which I know is in the Headland Salt River.  I highlight that and click select.  Same can be done for township and range.  Place my cursor in the township, hit the look up button and I have a list of all the townships.  I know from the application information that it falls in township 6 south.  The range; I can do the same thing.  Do a look up, all the ranges appear and I do my range is 15 east.  I highlight that and select it.  Sections are a 3 digit field.  So we know from the application our section is number 1 so I enter that as 001.  Section 25 would be 025; so on and so forth.  Now we want to talk about survey type.  Survey type is a single alpha or numeric character.  We can also do a look up on that as well and we have a list of different survey types.  From our research we found that from our application; it's the southwest quarter.  I would click A for aloquit and select that.  Next we have number.  The survey number may be up to 5 characters, as an example perhaps a mineral survey and then we have survey suffix which is a 2 digit character.  This would be utilized in say a freeform description which I will explain in just a moment.  So we now have entered our description; meridian 14, township 6 south, range 15 east, section 1 and we know it's an aloquit type survey and we said that the subdivision was the southwest quarter.  So enter that in as southwest.  Now I don't enter as one / quarter for southwest quarter and I do not enter it in as 4 for representing a quarter.  I just enter it in simply as the southwest, ending with a semicolon.  Now if we had say the freeform type description with say the part lying north of highway 60, and I know it's in the same area; I could simply click on the next line, the meridian township and range all automatically fill in saving me a little bit of time.  I'm going to say it's also in section one, but for the type, using our look up again we see that freeform is the number one.  I would select that and then I would type in my description.  This is part lying north of; north of the highway and east of the river. Now this shows up as two separate lines. If the suffix area is not used in description, case recordation will automatically alphabetize the description line by line and would place this out of sequence; would not make much sense so in the suffix I would need to number that as Ot1 and Ot2. The first line of this description is what pertains to our application so I don't need the next two lines. So have some toolbars at the bottom. First one representing where the radio button, line three in this example, if I were to click that I would be able to insert a line above line three. If I were to click the last button I would enter a line below the radio button, and the middle one is cut. So I want to cut out those two freeform lines. So I click the radio button on which line I want to delete and use the middle button, and there we have our description for the application for our right-of way. The county, field office and agency text fields are auto filled. If you want to override the agency text field that is automatically brought over from LLD; you would utilize the case land agency field. Otherwise just leave it blank.

Now that I've show you how to enter the location details; let's look at how to enter the action details. The action details consist of the action date, the code, the doc number, the action remarks and the pending field. The action date formate in case recordation calls for an 8 digit date giving the month, day and year. Month and day are two digits each with the year being four digits. I forward slash separates each field. I've entered in the date that the application came in. The action code to enter is extremely important. You may choose to run reports to ascertain answers to questions posed by your manager, the Washington officer, the public or others in your office or state. Many reports are run by a wide variety of individuals based on action codes; so it's very important to pay close attention to the codes you are entering into your case. To view the available action codes to utilize, run the domain code report from the CMR web site. Please refer to demo 1 for more info on the CMR. When entering action codes for your case, you may also click on the look up button to view a list of action codes and meaning. This list may be viewed in order by code, numerically or alphabetically by meaning. Click on the radio button for which method you would like to view the pick list. Highlight the desired code then click on select to have the code appear in your case. We know that we have an application received. I would scroll through the list, I find application received and I would select that. Always insure you are entering the correct code for the case. You may enter an action code remark with some codes. As an example, action code 500 equates to geographic name. In action remark you would enter geographic location near your case location as a point of reference. Action code 404 refers to title recordations; you would enter the book and page number where a title action, for instance, was recorded with the county under the action remark column. However, you do not need to enter the text description for the action code we chose. The text field, while not visible here, will appear in the view update screen and will appear on reports. The doc number field is used exclusively for mining plans. Please refer to the demonstration on mining plans and notices. The pending field is used to set an action to an entity. For example if you request information from an office; you can set the request pending to that particular office. Once the information has been received, remember to remove the pending office from this field. In our example and application has been received by the Tucson field office. The office must process the application so action 124, application received, needs to be set to the Tucson field office. Entering pending office codes comes in handy for managing your work load. I typed in LLAZ for the pending field office and I'm now looking for the Tucson field office. I highlight it and I select it and now they are set as the pending field office.

Some special formatting rules to keep in mind when entering data into LR2000 are; do not use commas in dollar amounts or in measurement details. Decimal points must be preceded by a number; use a leading zero for fractional entries. Money amounts begin with a dollar sign and end with a semicolon. Some national data stewards are working with the national operations center to build in system edits to insure data entered is in the correct format; so stay tuned for system enhancements.

Now that I've show you how to enter action codes, let's look at remarks. The remarks section of your case is an area you may place information about the case. It alerts a viewer to other cases that are related to the current case as an example and it may be noted here. Notations in this field are optional. Be aware this section does show up on the serial register page. As such insure no personally identifiable information appears, such as home phone numbers; this sort of thing. The jurisdiction acreage field is a hold over from the legacy ORCA system; it is not utilized at this time.

Now that we have at least one line of data for the required fields; we're ready to set up a new number for our case. We scroll up to the top or we can hit the go to the top screen line, and we're ready to generate validate the serial number. We click on the generate validate serial number button. A new case number will be assigned by the system. A preSNAM may also be validated if we entered it in the serial number field. After the generate validate serial number is clicked, a save button will appear on the right side of the screen. Insure you right down and remember the new number. Click your save button once your new number is assigned. It's also a good practice to write down your assigned number before clicking on the save button, and you'll notice there'll be a note returned that your new case has been inserted successfully, congratulations. Notice now that the disposition is set to the number 2, which equals pending so your case is now pending. Any additional updates or changes to the case will need to be done through the view update function.

Having said that, let's wrap this demonstration up. In conclusion I just demonstrated how to enter a new case into case recordation. During the demo I showed you how to do the following; showed you how to enter LR2000 through BAS; remember you'll need to fill out form NI1260-12 in order to gain access to BAS. Next I showed you how to enter header details; case types are tied into the code of federal regulations. Case types beginning with 22 as an example are exchanges and can be found under group 2200, exchanges, in the CFR. Showed you about acreage; acreage must be entered manually. Next I showed you about customer details; remember customers can only be obtained from a customer pick list. If you have a new customer request that they be added to the customer database from your person at the state office who maintains the database. Next I showed you about location details; adhere to the required formatting, fill in all fields for the legal description for your case; remember meridian codes are 2 digits, township and ranges are 5 characters each with the 4$^{th}$ character reserved for fractional designations; the number one representing a quarter, the number 2 a half, the number 3 represents 3 quarter designation, 5$^{th}$ character represents the direction. Sections are 3 digits each. Survey type is a single alpha or numeric character. Survey number may be up to 5 characters and a survey suffix is a 2 digit character. Next I showed you action details. We discussed how action details are extremely important where reports may be run to ascertain answers to questions posed by your manager, the Washington office, the public, yourself or even others in your office. It's important to pay close attention to the codes you are entering into the case. Next I showed you about remarks. Remarks are an optional field for your case. If you choose to enter remarks always remember you should never enter any personal information into the remarks section; such as personal phone numbers, social security numbers or comments just to name a few. Finally we addressed, once we have at least one line of data for the required fields for sending up a new case; we click on the generate validate serial number button to use the serial number automation module or SNAM and a new case number will be assigned by the system.  A preSNAM number may also be validated if we enter into the _____ serial number field.  Remember after the generate validate serial number button is clicked, a save button will appear to the right hand side of the screen. Make sure you write down and remember the new number.  Click the save button and your new serial number will be established.  Remember the old saying; garbage in, garbage out; so you want to please remember to follow the data standards when you're entering your data into case recordation.  Please refer to the CMR for the latest data standards and remember there is a demo on how to access the CMR if you need assistance.  As we previously mentioned; properly entering data into LR2000 will do the following; will save you time by returning accurate information and reports on your cases while allowing you to answer questions posed to you by your managers and customers, both inside and outside customers.  It will save you effort by assisting you in managing your work load by reports that can be run.  It will save you work by running the reports; they will alert you to cases such as grants permits or withdrawals to name a few that may be about to expire or that require periodic review.