

Demo_6_Shortcuts_for_Updating_Existing_Cases_FINAL

Hello and welcome to the shortcuts for updating existing cases demonstration; my name is Lydia Ferguson. I am a land and resources information systems application specialist at the Idaho state office. I started with the Bureau in 1989 and have been involved in the data collection and quality control of the automated land records project since then.

And my name is Emma Green; I am a land and resources information systems specialist at the Idaho state office and I teach LR2000 classes throughout the Bureau. I have worked at the Idaho state office since 1976, and I've been involved at the automated land records project since its inception.

In this lesson, we will describe how to use some shortcuts for updating existing cases in the case recordation database. During the last few years, with all the budget cuts, most of us have been assigned additional duties and so we are all very busy and anything that saves us time doing data entry in LR2000 will be a great benefit. The programmers have provided us with several tools to use that will make us make data entry easier and more efficient. It is extremely important that we enter our data accurately and on a timely basis. The Washington office has designed many reports that they use to show Congress what the tax payers are getting for their money. The reports are designed to show production, whether it be the number of sales in a community pit, how many acres of land has been acquired by the US, or how many miles of pipeline rights-of-way we have issued for various time periods. They also use reports to determine how

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many actions have occurred for each program element during the fiscal year, which directly affects our budget. So remember, their reports will only be as accurate as the data that has been entered.

Now that you know why knowing how to use shortcuts for updating existing cases is very important, let's take a look at the purpose of our demonstration. The purpose of our demonstration is to show how to copy and how to renumber an existing case to a new serial number for cases that are similar in nature and how to enter new action records to multiple cases. We will also demonstrate how to update an existing case by entering lines of general remarks in the middle of existing data.

Now that you know what our purpose is for this demonstration, let's take a look at what we will be covering. In this lesson we will cover copying cases. When entering a new case that largely duplicates another case it may be easier to use the copy function and change just the data that is different. When using the copy function, if the case has the following action codes they will not be copied to the new case. Also, if you use the copy function and the serial number copied has CBS entries, those entries will not copy to the new case.

We will also cover renumbering cases. If you use the renumber function and the case has action codes sent through the CBS interface, LR2000 users will be able to delete, update, or change the action record sent by CBS, but if any new action

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records are sent through the interface the new records will be locked and users will not be able to update the action remarks for the new entries. And, we will cover updating multiple cases. The update screens for land, actions, customer and remarks allow entry of data to multiple cases. You can update as many cases as necessary with as many lines of data as you need.

We will also cover adding to and renumbering general remarks. The option to renumber line numbers in general remarks has been added to assist those that need to insert lines of data between existing remarks or have alphas in the line number and want to renumber the case to all numeric. The general public does not have a right to know some information which may be found in case files. Please make sure you do not put sensitive information into the LR2000 database either into a data element or in the general remarks section. Please take a moment to review the list of sensitive data. Now that you know what we will be covering, let's begin.

Quite often, as adjudicators, you find yourself working on many similar cases such as rights-of-way or solid mineral leases. It could tend to be quite time consuming if each of these cases were entered into LR2000 individually. So, we have been provided with a copy function that makes entering like cases more efficient. Watch as we demonstrate how the copy function works. Under case recordation in the menu panel, click on view update. To use the copy function, open an existing case by entering the serial number in the transaction screen

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and then click on view. Change the serial number to the new number and then click copy. Click on OK in the “Are you sure you want to copy this case?” dialogue box. This copies all of the data in the case to the new serial number except any actions that were populated from CBS. Then you would need to change any or all data that needs to be changed to represent the new case such as customer, legal description, dates, actions, etc. The copy function works very well on cases that require suffixing such as pooled exchanges or R&PP, classification leases, and sales. Sometimes a case is entered with a typo in the serial number or with the wrong serial number. The renumber function would be used to correct the serial number. To do so, just enter the correct serial number and click on renumber.

The update multiple cases function is very useful when doing things such as compliance inspections on rights-of-way. After doing the inspections in the field for all the rights-of-way in your area of interest, you could use this function to enter the data without having to open each case individually. I will now demonstrate how to update multiple cases. To do so, open the first case by entering the serial number and clicking the view button; then scroll down to the action details section and click on update multiple cases. For this demonstration we will enter action code 950 – compliance approved and then click on save. Next, we will change the serial number to the next case and enter action code 041 – compliance exam completed and we will type needs reseeding in the action remarks for the reason. We will then click on save again; then we will

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change the action code to 474 – notice of non-compliance and click on save again. These steps could be would be repeated for any additional cases. When all the compliance exams are entered, click on cancel to exit the update multiple cases screen. This brings us back to the first case we worked on and as you can see it was updated with the appropriate action.

Adding to and renumbering general remarks. For training purposes we will be referring to the remarks portion of the data entry screen as general remarks. This is to differentiate between the remarks field and the action remarks field. While you are working on a case, you might realize that there is something you want to add to general remarks and maybe the best place to logically place it is in the middle of what is already in general remarks. Watch as we demonstrate this function. In the transaction data entry screen, open the case by entering the serial number and clicking on the view button. Then scroll down to the general remarks section and click on the renumber drop down menu. Select the renumber by 5 and click OK in the dialogue box. Then click on the update remarks button and add the number of blank lines needed. For this demonstration we will add 2 new lines. Enter new remarks using intermediary line numbers and click on save and continue. If the data you entered is what you wanted, click save and exit. Then we will open the renumber drop down menu again and select renumber by one and click OK again. The general remarks data is now complete and is number sequentially.

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Now let's review. The purpose of our demonstration was to show you how to copy and how to renumber an existing case to a new serial number for similar cases and how to enter new action records into multiple cases.

We also demonstrated how to update an existing case by entering lines of general remarks in the middle of existing data. In this lesson we covered copying cases, renumbering cases, updating multiple cases and adding to and renumbering general remarks.

In conclusion, the copy function makes entering like cases more efficient. The renumber function can be used to correct a serial number without having to delete the old case and create a whole new case. The update multiple cases function can be used to enter data without having to open each case individually. The adding to and renumbering function makes it easier to insert data into the middle of what is already in general remarks. Now you know how to use the shortcuts for updating existing cases to make data entry easier and more efficient. Washington office program leads are running reports any time they need information for a multitude of various reasons and time frames. Entering complete and timely data will help us justify our budget at the field office level as well as the state office level.

Now that we have reviewed the shortcuts for updating existing cases, let me finish by saying, remember that your reports will only be as accurate as the data

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that has been entered so please use the data standards set forth by the various instruction memoranda which are located in the Corporate Meta-Data Repository.