

WIS Advanced Features Part III

I'd like to do now is drill down a little bit more into the advanced features and look at some of the advanced features that are available at the form level but before I do this; before we moved off the screen that we have in front of you and look at some individual forms. I'd like to point a couple of additional features that are available on this screen. One of the things that you'll notice is that the columns have bold headings all the way across here and the default sort order for these forms are the most recent form at the top; chronologically going down in time. If we click on the date column it'll resort that page or that column to a modification date that's actually in reverse order starting from oldest to newest. If we're looking for a particular step we can click on the step column and sort from low to high or we click on it again and it'll go from high to low. Now these sort columns can also allow you to sort by process name so all of your documents of a certain kind are grouped together and again we can reverse the sort order and go from high to low or low to high. Clearly the sort order item; that's just the item number and it really doesn't do you anything for sorting.

What I'd like to do next is look at a number of features that are advanced that are actually seen on the individual form. So we'll open up this well completion report that's right here and I'd like to point out a number of things that are featured on the form itself. One of the first thing that you'll notice is that again we have the SP or the Probarus help button on a given form, we have a button to close the process, to print the process and then remember this is not the pretty print version of the form but it's actually the full data entry form that's there. We've

WIS Advanced Features Part III

looked at attachments previously, the auto fill button and the save button and the capability to go to the bottom of the form using the, to the bottom of the form button or to the top of the form with the same button that's on the bottom.

What I'd like to show you is a little bit more detail about the process details and again the I is for the information and the C is for comments exist. If we click on the button it actually brings us to what could be thought of as a history screen. You'll see that we have a process title, a process number, a unique identifier, where it's at in the process and some information about the modification date and time. Also down below we've got the basic chronology of the form, when it was created, who created it, what the action was, whether there were comments at that time, the next step that was done, the next step that was done etc. etc. The comment is right here that this particular WIS automation transaction was sent to the Mile City Office on 2/29 of 2012 at 2:06 p.m. and was given the six digit transaction number of 131936. This is a real good screen if you're not sure exactly where you are in the process that you can open up this screen and actually see the historical steps that were done on this document.

Another item that I'd like to show you is towards the bottom of the page. After you get done doing all your form information and you click on route, the sections 2 through 7 will be populated as the transaction is processed. The first thing that will occur is that section 2 will be filled in with your transaction number, the date that it was sent and the office that it was sent to. Now you remember we talked

WIS Advanced Features Part III

about steps 1 of 7, 2 of 7 through 7 of 7; this is where you will actually see those steps occur. Again to repeat 0 of 7 means your document has not been sent. 1 of 7 means it's been sent to BLM. 2 of 7 means it's been received by BLM and actually identified as a transaction. Here is step 2 of 7 in section 2. There are 4 review steps that are possible on a document internally in BLM so we have internal review 1, internal review 2, internal review 3 and internal review 4. When these reviews are done they will give you the type of review that was done, the date that it was completed and who completed that as a reviewer as well as any comments that they might've made about that particular review. The 4 steps of review that can be done on a given document are adjudication, engineering, geologic and surface. Some documents will get all 4 reviews; some documents will get 1 review or a combination of the 4. Again when those reviews are done, the review category will be populated in this block, the date the review was completed and the reviewers name as well as any comments that the reviewer puts in. Once all of the review steps that are required are done, the reviewer for that particular office will come down and actually trigger step 7 of 7 which is also the same as the action in section 7 and they will do a final disposition whether they approve or accept for the record or deny or reject the request there will be a disposition. The date will be completed, the reviewer name, the reviewer title and any comments that that approver will put in.

Now one of the things that you will notice is that the WIS application will send you e-mails in the process as the steps occur along the way. You'll get an e-mail

WIS Advanced Features Part III

message in your inbox when your transaction reaches step 2 of 7 when it goes to a review in any of the 3, 4, 5 or 6 steps in sections 3 through 6 and finally you'll get an e-mail in your inbox when the transaction goes to step 7 of 7 and has a final action taken on it. We've included in our resource section some examples of these e-mails. One thing you will notice is that the e-mail that you get at step 2 of 7 and 7 of 7 will have a pdf file attached to it which will allow you to do the same thing as the pretty print feature that you find under the attachment. You can print the PDF version of that form whether it was the submitted version or the approved or final revised version that the BLM sends you back. There will be those two pdf documents not only in your e-mail but they'll also be available from your WIS account.

Finally I'd like to show you some of the functions; the additional functions that are on the process action. We've gone over these before but just as a form of review. There are process actions on particular documents. Once you've routed a document you could transfer it to another individual in your office, send a copy of a blank form or send a copy of a filled in form to a coworker who has a WIS account or we could actually clone this document, duplicate it, save the work and send it on as an edited document without having to type of all the information in. So the clone feature should be your friend, you should use it often and if you do a clone remember to save your work, then edit it; close that process. Remember save early; save often is our motto.

WIS Advanced Features Part III

I hope I've given you some good tools in this session about some of the advanced features. If you have any questions about some of the advanced features or the tabs or the selections on these screens; feel free to contact the WIS administrator or check out the WIS user guide that is a link on the home page. What we'll do next is show you some troubleshooting hints to take care of form problems as you run into those.