



United States Department of the Interior



BUREAU OF LAND MANAGEMENT

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EMS TRANSMISSION: 2/25/05
Instruction Memorandum No. CA-2005-023
Expires: 09/30/06

To: CA Field Managers and CA Field Offices
Attention: Records Managers

From: DSD, Support Services

Subject: Revised BLM California Records Inventory User Guide **DD: 03/14/05**

Purpose: To provide an updated version of the California Records Inventory User Guide to all California field office records managers. (See attachment).

Due to an upcoming software conversion, the format of the current California records inventory will change. To facilitate this change, it is requested that all records managers review and update existing records **no later than March 14, 2005**.

Statewide access to the old application will be removed on March 15, 2005 to allow time for the new application to be rolled out.

An e-mail will be sent to all records managers, with a button to access the new application on March 16, 2005, by Fern Shepard, CASO IT specialist.

For further assistance or any questions, please contact acting California Records Manager, Richard A. Erickson, at (916)978-4303 or via e-mail.

Signed by:
Karen Barnette
DSD, Support Services

Authenticated by:
Richard A. Erickson
Records Management

Attachment:
BLM California Records Inventory Users Guide (4 pages)

BLM CALIFORNIA RECORDS INVENTORY
USER GUIDE

Basic User Instructions

Introduction

The CA Records Inventory database is a BLM California state database written in Lotus Notes. The program contains information on official records covering a variety of media types located in the California State Office and each of the BLM field offices within California. Mandated by the Bureau and the National Archives and Records Administration (NARA), a records inventory also serves as an office index to official records.

The system administrator for this program is located in the Branch of Information Resources Management (IRM) in the State Office. The Program Manager is the State Records Manager. The designated Records Manager in each of the field offices is responsible for input and verification of data entered for their associated field office.

Accessing the Database

If you are a new Program Manager, contact the IRM Help Desk and ask for access to the Records Inventory database.

- Access the Lotus Notes Database on your personal computer.
- Click on the Database icon to the left of the screen.
- Click on "Records Inventory"
- The BLM California Records Inventory page will open.

To Begin

- Clicking the "Horizontal Scroll" button at the top of the screen will toggle on and off the horizontal scroll bar at the bottom of the screen.
- Arrow keys may also be used to scroll horizontally or vertically.
- Clicking on a green arrow will expand a heading to reveal entries under that heading. Clicking again, on the same green arrow, will collapse the list.
- When creating a new record or editing an existing record, clicking on an arrow within a box will reveal select lists.
- On the left side of the BLM California Records Inventory screen, under the heading "View Information By" are several "views". These views simply arrange ALL records in the database differently. Note: the views DO NOT contain "copies" of the records; each record is in the database only once.
- Select your office location

Adding a New Record

New records are added by highlighting an item from the select list for each entry in the record.

- On the main screen, click on the "New" button at the top of the screen.
- Complete each item noted below for every new record entered.

Special Note: If you have a unique record specific to your office, and it is not on the select list, contact the State Records Manager so this unique record may be added to the list.

Records Description

The records description is taken from the GRS/BLM Combined Records Schedule, or as identified by a specific California office for a unique record. The record description is the title of the record series. Once data has been entered, the records disposition schedule citation will automatically be displayed next to the record description on the "Current Record Details" screen.

- Using the "Records Description" scroll bar, scan the list for the required record description.
- Highlight the item to be added.
- Click on "OK"

Subject Code

Subject codes are identified in the Bureau of Land Management (BLM) Manual 1220 Appendix 3.

- Using the “Subject Code” scroll bar, scan for the subject code applicable to the selected record description.
- Highlight the appropriate code, and click on “OK”.

Custodian

Custodian indicates the position title of the individual in charge of the record series.

- Using the “Custodian” scroll bar, scan for the position title of the individual who maintains the record.
- Highlight the appropriate position title, and click on “OK”.

Location

This identifies the office in which the record is located.

- Using the “Location” scroll bar, scan for your office location..
- Highlight the selected office, and click on “OK”.

Official Record

The definition of an official record can be found in BLM Manual 1220.11B.

- Highlight the accurate response, “Yes” or “No”, and click on “OK”.

Vital Record

The definition of a vital record can be found in BLM Manual 1270.13F. Vital records information may be obtained by referencing the GRS/BLM records schedules under the record series description.

- Highlight the accurate response, “Yes” or “No” as to whether the record being entered is a vital record.
- Click on “OK”.

Record Status

- Indicate, by highlighting, if the record is “Active” or “Closed”.
- Click on “OK”.

Cutoff Date

If you have indicated the record is closed, enter the closed date. The cutoff date is to be entered as month/day/year (xx/xx/xxxx), e.g. 09/30/2004.

Media Type

- Highlight the accurate response: Audio Visual, Electronic, Microform, Mylar, Paper, Photography. Indicate “Other” if the media is not listed.
- Click on “OK”.

Access Control

Privacy Act (PA) notations for Bureau records series are located in the GRS/BLM records schedules. The access category codes are noted in Washington Office Instruction Memorandum No. 97-094.

- Using the “Access Control” scroll bar, scan the list of Privacy Act restrictions.
- Highlight the correct response and click on “OK”.

Notes

Type in any additional information specific to, or which would be helpful to, your office.

Disaster Recovery

For **vital records** enter information pertaining to the location of any duplicate which may be referenced in the event the original record is destroyed in an office or location disaster.

Add or Cancel

When all entries have been completed, click on “Save” at the top of the input screen to add the record to your office inventory. Then click on “Close”.

If you wish to leave the input screen without adding a record, click only on “Close”. You will be prompted to save the record. Click “No”.

Viewing Information

- Information for each office may be viewed by highlighting a view under “View Information By” on the main screen.
- As an example, highlight “Access Control” to view the list of Privacy Act notations and access categories.
- Highlight one of the items on the list and click on the green arrow to see a list of locations that have used the notation.
- Highlight a location and click on the green arrow to view the record(s) associated with the PA notation or access category.

Viewing an Individual Record

- On the main screen of the BLM CA Records Inventory, under “View Information By”, click on “Location”.
- Highlight your office name.
- Click on the green arrow to the left of your office name to view all the records in your office inventory.
- To view all information for an individual record, highlight the record and click on the “Open” button at the top of the screen.

Editing or Updating an Individual Record

- Highlight your office location and click on the green arrow to view all records.
- Scan the list for the individual record you wish to edit or update and highlight the entry.
- Click on the “Edit” button at the top of the screen.
- On the “Current Record Details” screen, make any necessary corrections or additions.
- On the select list for the item you wish to edit, highlight the change and click on “OK”.
- Click on “Save” and then “Close” at the top of the screen.

Deleting an Individual Record

- On the main screen select “Location”
- Highlight your office name and click on the green arrow
- Scan the list of records for the individual entry you wish to delete
- Highlight the entry to be deleted
- Hit the delete key on your PC keyboard. A blue trash can symbol will appear in the column next to the marked record.
- Hit F9
- A small window appears asking if you want to delete the document from the database.
- Click on “Yes” or “No”.
- If you click on “Yes” the record will be deleted.
- If you click on “No” the record will not be deleted but will remain marked for deletion. See instructions To Undelete a record.

Deleting More Than One Record

- Click in the left column next to each record to be deleted
- Hit the delete key
- Hit F9
- A small window appears asking if you want to delete the number of documents you have selected from the database.
- Select “Yes” or “No”.

To Undelete

- Click next to the trash can symbol for the record marked for deletion. A check mark will appear.
- Hit the delete key and the record will no longer be marked for deletion.

Generating a Report

- On the main inventory screen, click on the “Generate Report” button at the top of the screen.
- Choose the type of report you want to create, then click OK
- Next, choose the office to report on, then click OK
- **Note: Generating the report will take several moments. Please be patient!**
- The report will be created and presented to you in Excel
- Click File, Print to send the report to the printer. Note: All page formatting has been done for the report to print in LANDSCAPE.
- When the report has finished printing, click File, Close then “No” when asked to save changes.
- Note: There is no need to save Excel reports.

Exiting the Program

In the upper left hand corner of your computer screen, click on “File” and “Close”.