

PHILIPPINES-AUSTRALIA LAND ADMINISTRATION AND MANAGEMENT PROJECT

User Manual PIO2 Tracking/Cross Index System

Version 11

Prototype 2 – Land Records Management
Quezon City

May 2004

REPORT D31



DOCUMENT VERIFICATION

DOCUMENT APPROVAL

TITLE: Manual on Field Validation Procedures					
GENERAL DESCRIPTION: Procedural Manual to support the validation and management of land records for Prototype 2 of the Philippines Land Administration and Management Project (LAM Project).					
REFERENCED DOCUMENTS: DENR Manual on Settlement of Land Disputes (also prepared under the Italian funded project GOP/PH/040/ITA). LAMP Project Preparation Report, February 2000. LAMP Project Implementation Plan (maintained by the PMO). LAMP Financial Management Manual LAMP Framework Monitoring and Evaluation World Bank Procurement Guidelines LAMP PIO2 One-Stop-Shop Manual (not yet prepared) LAMP PIO2 CRS Manual (not yet prepared) Social Assessment Phase 1 for LAM Project (Prototype 2 IAW) Technical Specifications for Orthophotography					
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	APPROVED	NAME	POSITION Prototype Manager	SIGNED	DATE
	APPROVED	NAME Henry Pacis	POSITION Deputy Prototype Manager	SIGNED	DATE

1 Introduction

The PIO2 Tracking and Cross index system has been developed in Access this manual sets out the basic operations and is a guide to the features that have been developed as at the day of publication. Where enhancements are made to the Tracking/Cross index this manual must also be updated.

1.1 Purpose of the Tracking/Cross index

The Cross index is used to locate land records from existing systems held by the Registry of Deeds (ROD), Local Government Unit (LGU), both assessor's and treasurer's and the BIR. It also contains references to the Cadastral Index Maps (CIM) that will held in the One Stop Shop (OSS), which will enable the searching of land records using the CIM.

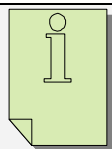
The Tracking System will be used to track dealings lodged in the OSS to enable the staff to quickly locate where a dealing is and what processing has already taken place.

1.2 Updating of the Tracking/Cross index

The Tracking system is updated by the staff within the OSS. The initial updating of the Cross index will be carried out as part of the office/field validation. Once in the OSS the updating will occur as part of the day to day operations.

1.3 Use of this manual

This manual has been developed for use in the OSS to aid the work of the staff assigned there. The manual sets out how each screen operates and may have additional information (as shown below)



The additional information will explain what the system will do when an entry is performed. Or it may be a reminder of an action that must take place.

Or alternative suggestions as many functions can have an alternate that can be used what is set out in the manual is the standard way to enter detail, but there may be alternatives that some people are more comfortable with



Alternate suggestions. A system wide alternative in Access is to use the Tab key instead of the Enter key both of which act the same way on the screens.

2 Main Menu

The main menu (as shown below) will automatically be displayed when the database is opened.



The main menu allows the user to select the operations, which they wish to perform.

The Menu is setup to display the options available for creating and tracking requests and for searching the cross Index. The request menu also allows the creation and maintenance of staff details.

To make a selection click on the button for the desired operation, for example to create a new request to be tracked click on Request Form in the Requests menu.

3 Requests Menu

The Request menu is located on the top left hand side of the Main Menu and is shown below.

Requests

- Request Form
- Move Transaction
- Track Movement
- OSS Staff

The requests menu allows the user to select the tracking operations, which they wish to perform.

The four options are:

- to go to the request form screen to create a new request and record the customer details
- to go to the move transaction screen where a transaction can be moved to another person within the OSS, a mother unit or marked as completed for the operation being carried out.
- To go to the track Movement screen where all movements of the transaction are shown, the latest position being shown at the top.
- To add, modify or enquire on staff within the OSS.

The required operation is selected by placing the cursor over the box to the left of it's name and clicking the left hand mouse button.

3.1 Request Form

The Transaction Request Form is designed to capture basic information about the customer and the type of transaction they wish to perform. Each copy of the cross index will have a default value of the staff Id belonging to the main user of that PC. In the top right hand corner under the Date and Time the staff Id and the Staff members name will be displayed. If the name displayed is not the operators name they must change the details to their own **after** they press the next customer button. Each new request will be allocated the next available request number, which will be allocated as soon as data is entered into any other field on the form

Buttons used on the form

Most forms contain pre-programmed buttons that will carry out specific actions. These are designed to assist the operator in there work. The buttons displayed on the Transaction Request form are:

Next Customer

Displays a blank Request form ready to service the next customer.

Locate Request

Before using the cursor should be in the field that the details being searched are in. Allows the operator to locate an existing request by request number, customer name, etc.

Main OSS Menu

Returns the operator to the main menu where they can select another request or search function.

Move Transaction

Takes the operator to the Track movement form where the document can be moved to another location

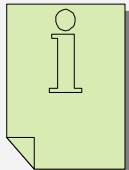
Close Form

Closes the form and will display the last form used (usually the OSS menu).

The Transaction Request Form is shown below.

3.1.1 Staff Identification

The first step in the process is to ensure that the correct staff member performing the operation is displayed. The Staff Id in the top right Hand Corner will be set on the screen as the person who is logged on. The Id number of the operator is linked to the OSS staff table and will link the request to the officer who served the customer. Each staff member who works in the One Stop Shop will be allocated a unique identification number.



It is important that you have selected next customer if you are creating a new request and changing the staff identification, otherwise you will change an existing record.

To change the staff information, click on next customer when a blank screen is displayed move the cursor a position over the staff id number and click. The field will appear with a white back ground and the staff id number can be changed, when the enter key is pushed the staff name will be changed to the name of the person whose staff number was entered.

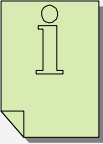
3.1.2 Creating a new Request

To create a new request click on the Next Customer button and a blank Request Form screen will be displayed.

Click on the arrow on the right hand side of the Type of Transaction field and a pull down list of option will be displayed as shown below

Scroll down the list until the desired transaction type is displayed then select it by clicking on it.

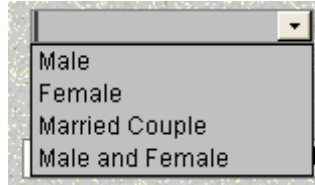
Then press Enter to move to the customer name field



The Request Number field which initially displayed (AutoNumber) will be automatically filled with the next request number. Also the date and time of the request are system generated and displayed.

Key the customer Name then press Enter to move to the Customer Address Field.

Key the Customer Address and press Enter to move to the Gender field. The following alternatives will be displayed:



The gender field is a new innovation within the OSS and is used to determine the profile of the customers using the services. The standard Male and Female options also have Married Couple, as well as Male and Female to identify where the applicants are more than one person, not married and they are a mixture of male and female.

If there is more than one applicant and they are all male select "Male", alternatively for multiple female applicants select "Female".

Once the Gender has been selected press TAB and the cursor will move to the Contact Number field.



Alternate suggestions. You can just use the cursor to click into any field rather than the TAB key.

If the request is a 'General Enquiry' and the customer has been satisfied, click the "Transaction Complete" field box to close the request.

3.2 Move Transaction

The screenshot shows a Microsoft Access window titled "Microsoft Access - [Request Tracking]". The window contains a form for "Move Transaction" under the heading "LAND ADMINISTRATION AND MANAGEMENT PROJECT" and "Project Implementation Office 2 - Quezon City". The date and time are "Monday, March 15, 2004" and "9:27:20 AM". The form includes fields for "Transaction Number", "Date of Transaction" (8/11/2003 1:20:30 PM), "Active" (checkbox), "Date Completed" (8/11/2003 3:34:00 PM), "Sent to" (Atty Cas), "Staff Id Number" (1), "Given Name" (Henry), "Surname" (Pacis), and "Department" (LAMP Prototype Implementation Office 2). A "Note" field is present with a "Track this transaction" button. At the bottom, there are navigation buttons: "Move a Transaction", "Locate Request", "Main OSS menu", "Track Movement", "Request Form", and "Close Form". The status bar shows "Record: 1 of 10" and "Form View".

3.3 Track Movement

The screenshot shows a Microsoft Access window titled "Microsoft Access - [Track request]". The window contains a header with a logo on the left and text on the right: "LAND ADMINISTRATION AND MANAGEMENT PROJECT", "Project Implementation Office 2 – Quezon City", and "Monday, March 15, 2004 9:29:31 AM". The main title is "Track Movement".

Below the header, the form displays the following information:

- OSS Dealing No**: 4
- Transaction Type**: Certified true copy of title
- Customer Name**: Fred Smith
- Customer Address**: # Jones Street QC
- Contact Phone Number**: 925 3129
- Created by**: Shirley Sinson
- Start Date**: 8/28/2003 3:29:50 PM
- Gender**: Male

A "Transaction Tracking" table is displayed with the following columns: Name, Date and Time Created, Active, Date Completed, Sent to, and Additional Details. The table contains two records:

Name	Date and Time Created	Active	Date Completed	Sent to	Additional Details
Shirley Sinson	8/28/2003 3:35:53 PM	<input checked="" type="checkbox"/>			Waiting customer
Henry Pacis	8/28/2003 3:31:56 PM	<input type="checkbox"/>	8/28/2003 3:34:43 PM	ROD	Getting Copy of title


At the bottom of the window, there are navigation buttons: "Close", "Move Transaction", "Locate Request", "Main OSS menu", and "Request Form". The status bar at the bottom indicates "Form View" and "NUM".

3.4 OSS Staff Maintenance

Microsoft Access - [OSS Staff]

File Edit View Insert Format Records Tools Window Help

Type a question for help



LAND ADMINISTRATION AND MANAGEMENT PROJECT

Monday, March 15, 2004

9:30:47 AM

Project Implementation Office 2 – Quezon City

OSS Staff Maintenance

Staff Id Number: 4

Title: Ms Given Name: Gina C. Surname: Pobre

Gender: Female

Department: Registry of Deeds Quezon City Designation: Examiner

[Add New Staff](#) [Find Staff Record](#) [Main OSS menu](#) [Track Request](#) [Request Form](#) [Close Form](#)

Record: 4 of 36

Form View NUM

4 Cross Index Search

Search

- **Name Search**
- **Company Search**
- **Address Search**
- **TCT Search**
- **Survey Plan Search**
- **PSPIN Search**
- **CIM/UIP Search**
- **Cancelled TCT Search**