Conservation Easements Registry
Admin Manual

Public Search

To search the registry.
1. Log on to http://easements.resources.ca.gov
2. Click the 'Public Search' tab (at the top of the page, next to 'Home')
3. Fill out the search field and click 'Search' to make a general search
4. To make an advanced search click 'Advanced Search'
   o You will see multiple search boxes. Simply fill in the boxes for your search criteria and click search. This search will only display records that match ALL of your search criteria.

Once you have searched, you have several options to view the data.
- Online.
   o You can sort the results by clicking the 'Sort Records' button. A popup menu will display all of the columns in the public table. Mouse over the column you wish to sort by, then click 'Ascending' or 'Descending'.
   o If you wish to view the data in a popup, make sure the 'Inspect' check box is checked. Then click on a row you wish to view. That row's data will popup in a dialog window for easy viewing.
- Excel document.
   o If you wish to download the results of a search, simply click 'Export Search Results'. The results will be downloaded as a .xls (Microsoft Excel) file.

Creating an Account

Create an admin account for the registry.
1. Log on to http://easements.resources.ca.gov
2. Click the 'Login' tab (at the top of the page, next to 'Public search') or click 'Login' under the Site Links section (at the left of the screen).
3. At the login screen click 'Create Account' underneath the login box that asks for email and password.
4. Fill out ALL of the form fields. Then click 'Create Account' at the bottom of the page.
5. You should see a confirmation page telling you 'Your account is pending approval. After approval a confirmation email will be sent to you'.
6. Once your account is approved by an administrator, you will receive an e-mail to confirm your account.
7. Open your e-mail and click the URL (or copy and paste the URL into the address field of your browser). You should be redirected to a page saying 'Your account has been confirmed '.
8. You are now registered.

Verifying your account.
1. Log on to http://easements.resources.ca.gov

2. Click the 'Login' tab (at the top of the page, next to 'Public Search') or click 'Login' under the Site Links section (at the left of the screen).
3. Enter your e-mail address and password into the appropriate boxes and click 'Login'
4. You should see 'Welcome Conservation Easement Administrators!' at the top of the page. You are now logged in.

What would you like to do?

Add/Update/Remove Existing Records Online

Export Data

Re-upload Updated Data

Download Excel Spreadsheet Template to Start From

Add/Edit/Remove Data Online
1. Log on to http://easements.resources.ca.gov
2. Click the 'Login' tab (at the top of the page, next to 'Public search) or click 'Login' under the Site Links section (at the left of the screen).
3. Enter your e-mail address and password into the appropriate boxes and click 'Login'
4. Then click 'Add/Update/Remove Existing Records Online' under 'What would you like to do?'
5. You will be taken to a page that allows for:
   o Inserting a new record
   o Removing a record
   o Editing an existing record
6. Follow directions below
   o Note: only records you have permission to edit will be shown. Permissions are based on which organization you are registered with.

Sort Records   Edit Mode   Delete Mode   Create New Record   Save Changes

Editing an existing record
1. To edit records click the check box next to 'Edit Mode'. You are now in the tables editing mode.
2. Click on a record (row) you wish to edit.
3. A popup will appear allowing you to edit the contents of the selected record.
   o Note that some of these fields have drop down selection, some are text open text fields and one is a type ahead field.
   o The 'Nearest City' text box is based on the GNIS list of incorporated cities for California. Only these cities will be valid. As you start typing, suggestions for cities will appear.

Nearest City: sac

Responsible Agency: Parkway-South **Sacramento**

Identity Of Easement Holder: **Sacramento**

Size (Acres): West **Sacramento**

- o To select a date, click the calendar icon and a calendar will popup. Click the day on the Calendar you wish to enter in the text box to the left. To navigate to different months or years, use the arrows above the date boxes.

Date Of Recordation: 4/15/2009

Holder Unique ID:

Property Name:

Agency Parcel No:

Grantor:

DGS History Number: 0

Assessors Parcel Number:

Multiple Funding: No

Please Select Date Below						
<	<<	April, 2009			>>	>
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Cancel

4. While you are making changes you can click 'Check For Errors' to update the error fields or see if you have entered any invalid data.
5. Once your are done click 'Update' or if you wish to cancel your changes simply click 'Cancel'.
   - o If you have errors that prevent the record from being displayed to the public a popup box will show alerting you of this. You are free to continue saving, just know that records with errors will not be shown to public. These records have a red boarder around them in the admin table.
6. Repeat this process as many times as needed.
7. Once you have finished with your updates, click the 'Save Changes' button. Note, this is very important. The database will not be updated until you hit this button. If you leave the page without clicking 'Save Changes', all of your changes will be lost.
   - o Once you have edited a row you will see it is highlighted yellow until you click save.

Removing a record
1. To remove a record from the database, first click the check box next to 'Delete Mode'. The admin table is now in deletion mode.
2. Click the record (row) you wish to delete from the table. A popup window will display showing you the contents of that record. Review it and make sure its the record you wish to delete. If so, click 'Delete Record'. Otherwise click 'Cancel' and the record will not be deleted.
   - o Note, once you have selected a record to be deleted it will show with a grey background and all text will be strikethrough.
3. Repeat this process as many times as needed.
4. Once you have finished with your deletions, click the 'Save Changes' button. Note, this is very important. The database will not be updated until you hit this button. If you leave the page without clicking 'Save Changes', all of your changes will be lost.

Inserting a new record

1. To insert a new record click the 'Create New Record' button.
2. A popup will display with a blank record for you to fill out. Fill out the form fields.
3. Once you have finished filling out the form click 'Create Record'. You may also click 'Cancel' if you wish cancel your creation of a new record. At any point you may click 'Check for Errors' to see if you have added any invalid data.
   o If you have errors that prevent the new record from being displayed to the public a popup box will show alerting you of this. You are free to continue saving, just know that records with errors will not be shown to public. These records have a red boarder around them in the admin table.
4. Repeat this as many times as needed.
5. Once you have finished with your updates, click the 'Save Changes' button. Note, this is very important. The database will not be updated until you hit this button. If you leave the page without clicking 'Save Changes', all of your changes will be lost.
   o New records will be highlighted green until they are saved.

Searching for data to edit

1. You may find you have a lot of data and wish to search for some subset of the records your organization owns. Enter your search text into the text box next to the 'Search' button. Click 'Search' and all of your records will be searched for any cell matching the search text (this includes numeric and date cells).
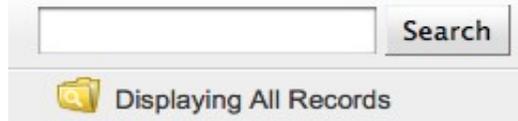
2. You can also search by the record's status. This includes records with errors, updated records, new records and deleted records. To do this simply click the yellow folder with the magnifying glass. A menu will display asking for what type of records you wish to see. Just select a type from the menu.
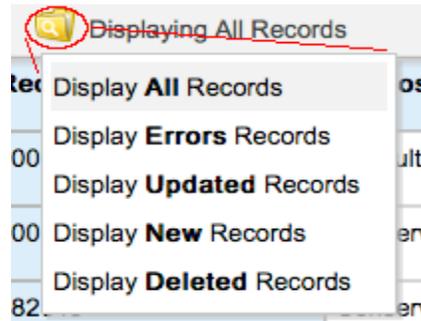
3. Finally, you can sort your searches by clicking the 'Sort Records' button. A menu will display showing all of the columns for the table. Mouse over the column you wish to sort by, then click on 'Ascending or Descending' and the table will be sorted by that column.

Edit Data Offline

1. Log on to http://easements.resources.ca.gov
2. Click the 'Login' tab (at the top of the page, next to 'Public search') or click 'Login' under the Site Links section (at the left of the screen).
3. Enter your e-mail address and password into the appropriate boxes and click 'Login'
4. Then click 'Export Data' under 'What would you like to do?'
5. Click 'Get Data (Excel File)'. This downloads an Excel file to your computer.
   o Note: this document contains every record in the database. You can change any field while the document is on your computer, but only records you own will be updated when you upload changes to this document.
6. Now you are able to edit data rows off line. You can add, delete and edit cells.
7. Once your changes are complete, reopen your web browser and return to the admin page.
8. Click 'Re-upload Updated Data'.

9. Browse to the Excel document by clicking browse and select who the data belongs to (most people will have only one group to choose from).
10. Now click 'Submit Data'.
11. Once your data has been uploaded you will see a screen showing the results of your upload.

12. If everything looks correct you can click 'Save to Database' and all of your changes will be saved.
13. If you wish to cancel the upload, simpley click 'Cancel Upload' and none of your changes will be saved.
14. If would like to review the upload before you save (recommended) click 'Review Upload'.
    o Once you click 'Review Upload' you will be redirected to a table showing ONLY the changes about to be made to the database.
    o Here you are free to further add/edit/delete these records in the same manor as the normal admin table (see instructions above). Once you are ready to save the records click 'Approve' or 'Cancel' if you wish to cancel.

Upload New Data Set
1. Log on to http://easements.resources.ca.gov
2. Click the 'Login' tab (at the top of the page, next to 'Public search) or click 'Login' under the Site Links section (at the left of the screen).

3. Enter your e-mail address and password into the appropriate boxes and click 'Login'
4. Then click 'Download Excel Spreadsheet Template to Start From' then click 'Download Template'.
5. An Excel spreadsheet will be downloaded to your computer.
6. Update this spreadsheet with as many records as you would like.
7. Once your changes are complete, reopen your web browser and return to the admin page.
8. Click 'Re-upload Updated Data'.
9. Browse to the Excel document by clicking browse and select who the data belongs to (most people will have only one group to choose from).
10. Now click submit data.
11. You will proceed through the same process from step 11 above (Edit Data Offline).