



PURPOSE

The purpose of this Work Instruction is to aid volunteer editors of the PRS in transcribing data found in original Record Copies.

SCOPE

This process should be used by all volunteers editing Patriot records within the PRS.

DEFINITION

Annotations – In our context, annotations are often handwritten corrections and additions the applicant or SAR Staff Genealogists add.

PDF - Abbreviation that stands for Portable Document Format. It's a versatile file format created by Adobe that gives people an easy, reliable way to present and exchange documents.

PRS – Patriot Research System, the Sons of the American Revolution online research tool for individuals who served or aided the United States during the Revolutionary War period.

Publisher – Approver, a role assigned to review and approve the work submitted by PRS editors.

RC – Record Copy.

Record Copy – A scanned copy of an original member application.

ROLES

- PRS Volunteer Editors
- PRS Volunteer Publishers

Document: PRS-009	For Internal SAR Use Only	Effective Date: 27 Aug 2023
Revision: 2		Page 1 of 10



Transcribing Record Copies - Part 1 How to Get Work



Contents:

Volunteer Dashboard Menu	3
Application Statistics and Filters by Society	4
Get Work	6
Application Search Results	7
Reopening Saved Work	9

Terms and Help:

- Volunteers must follow these instructions.
- Have system access to allow them to perform this process.
- Have been assigned a state(s) to work in.
- Understands how to log into the **PRS** system.
- Have completed this required training.

If you find an issue or problem where you can't follow the instruction, please reach out to your state lead or email the PRS administrators at PatriotGraves@SAR.org

Document: PRS-009	For Internal SAR Use Only	Effective Date: 27 Aug 2023
Revision: 2		Page 2 of 10

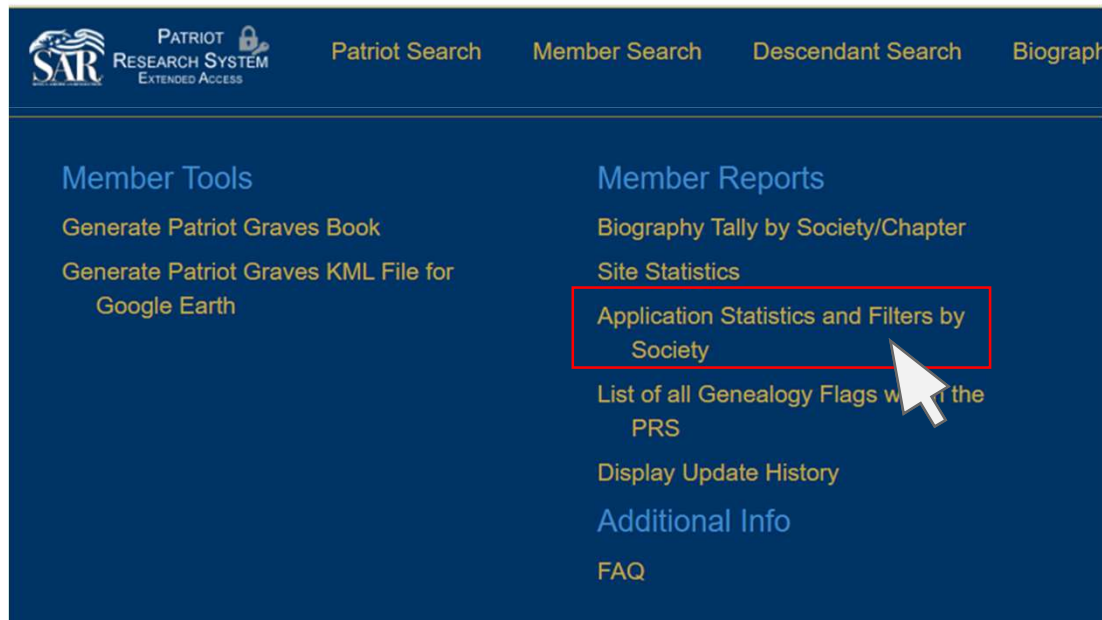
A. Volunteer Dashboard Menu - From the PRS App, look for the Volunteers option in the upper right of the screen in the Action Tab Menu.

1. Click on the link to open the **Volunteer Menu**. Note: Always read the screens, as options may change occasionally.



2. Under the Member Reports section, click on the **Application Statistics and Filters by Society** option.

Image 2



B. The **Application Statistics and Filters by Society** report may take a few moments to run, so be patient.

Image 3

This is a waterfall report of the statistics per Society. Each column must meet all characteristics of the columns to its left.
Latest version changes the computation of the %-ages to be based up records available to the volunteers (column 4) instead of known existing records with National (column 3).

(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)
Abbreviation	Society	Total Apps	+ Record Copy Available	+ Patriot Linked	% Patriot Linked	+ Complete Lineage	Percent Done	Remaining Unavailable Record Copies
AK	Alaska	225	225Q	225Q	100.0%	225Q	100.0%	0
AL	Alabama	5077	5073Q	5073Q	100.0%	5073Q	100.0%	4
AR	Arkansas	1978	1969Q	1967Q	99.8%	1967Q	99.8%	9
AZ	Arizona	3528	3522Q	3522Q	100.0%	3522Q	100.0%	6
CA	California	10401	10393Q	10393Q	100.0%	10393Q	100.0%	8
CAN	Canada	166	165Q	163Q	98.7%	163Q	98.7%	1
CHE	Switzerland	30	30Q	30Q	100.0%	30Q	100.0%	0

1. You see a Filter option at the top of the report screen. It is unlikely you will need to use these filter options.

Image 4

- Filters are used to limit the data by a range of Approval Dates.
- The system defaults to All Applications, so that's a good place to start. No changes are required in that case, and you can continue with the results.

2. This is a waterfall-type report, meaning you drill deeper into the report each time you click a link. Links are shown in Blue text in columns two (2) and three (3).
 - The goal is to reach 100% in column eight (8) **Percent Done**, which means you have transcribed all available Record Copies.
 - Some record copies may not be available. That quantity is shown in column nine (9), **Remaining Unavailable Record Copies**.
 - By clicking on the state name in column two (2) **Society**, you expand the report to show individual Chapters (image 6).

Image 5

(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)
Abbreviation	Society	Total Apps	+ Record Copy Available	+ Patriot Linked	% Patriot Linked	+ Complete Lineage	Percent Done	Remaining Unavailable Record Copies
AK	Alaska	224	224	224	100.0%	224	100.0%	0
AL	Alabama	5060	5056	5056	100.0%	5007	99.0%	4
AR	Arkansas	1971	1962	1962	100.0%	1894	96.5%	9

List of Chapters within the state.

Image 6

Abbreviation	Society	Total Apps	+ Record Copy Available	+ Patriot Linked	% Patriot Linked	+ Complete Lineage	Percent Done	Remaining Unavailable Record Copies
AR	Abraham Van Buren	93	93	93	100.0%	93	100.0%	0
AR	Arkansas Society SAR	432	431	431	100.0%	431	100.0%	1
AR	Bayou Bartholomew	70	70	70	100.0%	70	100.0%	0
AR	Casimir Pulaski	190	190	190	100.0%	190	100.0%	0
AR	Chickasawba	53	53	53	100.0%	53	100.0%	0
AR	Col Daniel McKissick	43	43	43	100.0%	43	100.0%	0
AR	Crowley Ridge	118	118	118	100.0%	118	100.0%	0
AR	Desoto Trace	193	193	193	100.0%	193	100.0%	0
AR	Ecore Fabre	18	18	18	100.0%	18	100.0%	0
AR	Gen Lafayette	216	215	215	100.0%	215	100.0%	1
AR	Jordan Milam	91	91	91	100.0%	91	100.0%	0
AR	North Little Rock	7	7	7	100.0%	7	100.0%	0
AR	Old Fort Smith	86	86	86	100.0%	86	100.0%	0
AR	Southwest Trail	85	85	85	100.0%	85	100.0%	0
AR	unassigned	180	179	179	100.0%	179	100.0%	1
Grand Total		1875	1872	1872	100.0%	1872	100.0%	3



The next section shows you can click on any red magnifying glass icon to view work.

3. To Get Work, start by reviewing columns three (3), four (4), five (5), and seven (7). Look at the line for Arkansas in the example below.

- **Column 3 = Total Apps.** This is the total number of processed and unprocessed applications.
- **Column 4 = Record Copy Available.** This column shows the number of application Record Copies that have been linked to an application. These are PDF file copies of the original member applications. Occasionally, it's determined that an error has been made during this process, which causes the application record copy to not be available to you. The total number of these for Arkansas (example below) is 9 in column nine (9).

1971 is the value of Column 3

 -9 subtract the value of Column 9

1962 is the sum of these two numbers, reflected in Column 4

- **Column 5 = Patriots Linked.** Part of the processing of work includes linking a Patriot's "P" number to the Application. We will describe this in detail in Module 2.
- **Column 7 = Completed Lineages.** The value of this field represents the number of applications that have been processed. If it's less than the value of Column 4, you have work available to be processed.
- To get work, click on the Red Magnifying Glass icon in Column 5, **Patriots Linked**.
- Available work will be displayed in a new report (see image 4) called the **Application Search Results**.

Image 3

(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)
Abbreviation	Society	Total Apps	Record Copy Available	Patriot Linked	Patriot Linked %	Complete Lineage	Percent Done	Remaining Unavailable Record Copies
AK	Alaska	224	224	224	100.0%	224	100.0%	0
AL	Alabama	5060	5056	5056	100.0%	5007	99.0%	4
AR	Arkansas	1971	1962	1962	100.0%	1894	96.5%	9



Application Search Results Screen. List of applications waiting to be worked:

Image 4

1 Records Located (1 pages)
Showing records 1 - 1

Society	ACN	Member	Patriot	Date Approved	Record Copy Available	Lineage Data	
AR	103610	Darrell Ray Over (199974)	William LAFFOON (P-233239)	2022-12-02	✓	✗	Edit Application

4. The **Application Search Results** report will show all the available applications waiting to be worked:

Image 5

Application Search Results

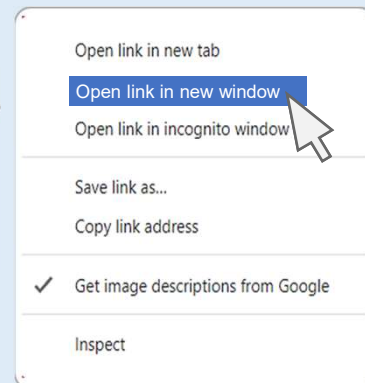
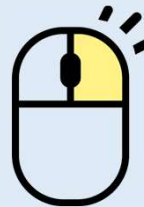
Showing results for Applications without Patriots linked in: CO / Pikes Peak

Limit View to: All Applications (1889 - current) Sort By: ACN Apply Filter

1 Records Located (1 pages)
Showing records 1 - 1

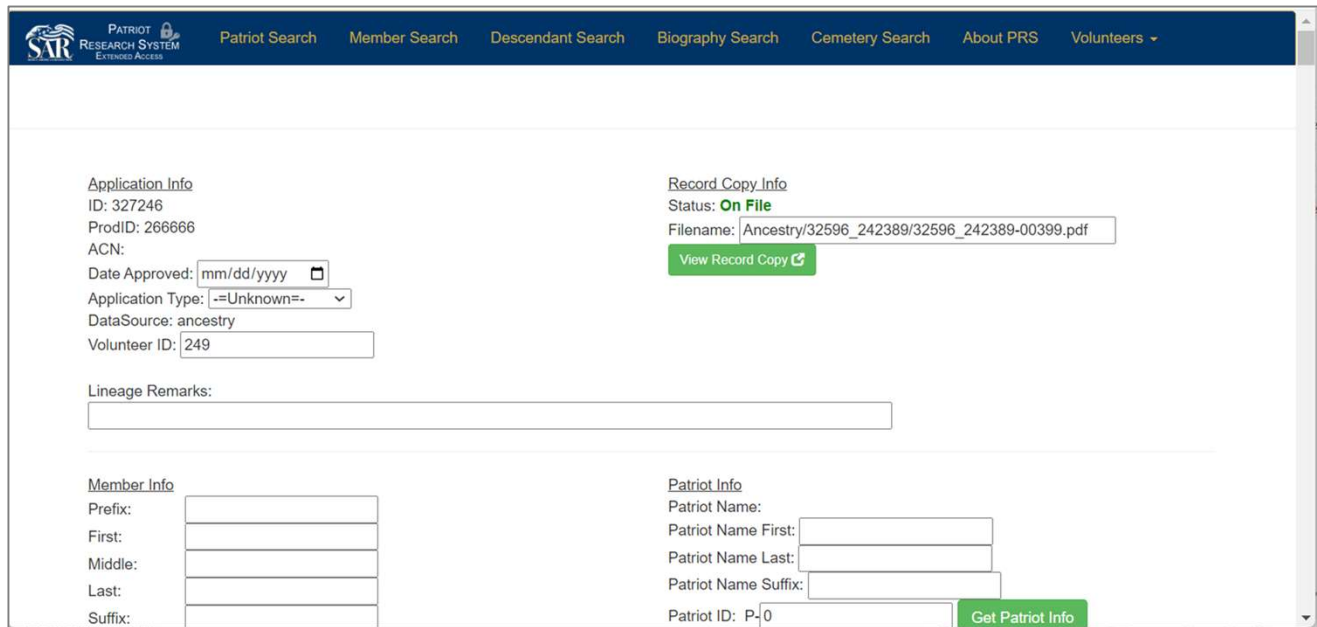
Society	ACN	Member	Patriot	Date Approved	Record Copy Available	Lineage Data	
CO	Unassigned	Gerald D Allgood (94760)	(Unindexed)		✓	✗	Edit Application

If the report has multiple applications waiting to be worked, you may open the Edit Application screen in a new Tab or Window on your desktop. Press the right mouse button to open a pop-up menu and select the option for **Open link in new window**.



5. The blank Edit Application transcription page will open.
 - Continue to the Work Instruction for Module 2 for the next steps.

Image 6



The screenshot shows the SAR Patriot Research System interface. At the top is a navigation bar with links: Patriot Search, Member Search, Descendant Search, Biography Search, Cemetery Search, About PRS, and Volunteers. The main content area is divided into several sections:

- Application Info:** ID: 327246, ProdID: 266666, ACN: [empty], Date Approved: mm/dd/yyyy (calendar icon), Application Type: [.-=Unknown=-] (dropdown), DataSource: ancestry, Volunteer ID: 249.
- Record Copy Info:** Status: **On File**, Filename: Ancestry/32596_242389/32596_242389-00399.pdf, View Record Copy (button).
- Lineage Remarks:** [empty text area]
- Member Info:** Prefix: [empty], First: [empty], Middle: [empty], Last: [empty], Suffix: [empty].
- Patriot Info:** Patriot Name: [empty], Patriot Name First: [empty], Patriot Name Last: [empty], Patriot Name Suffix: [empty], Patriot ID: P-0, Get Patriot Info (button).

BEFORE we leave the Module 1 work instruction, we must look at the steps for reopening saved work (see the next page).

6. Reopening Saved Work - Once you start Editing an Application, it will remain in your work queue until you submit it for processing and approval by a Publisher.

- The applications you've started can be viewed by clicking on the **Edit Application** topic in the **Volunteers Dashboards**, as shown below (image 7).
- Clicking on the title will open a new report showing all work you have pending (image 8).

Image 7

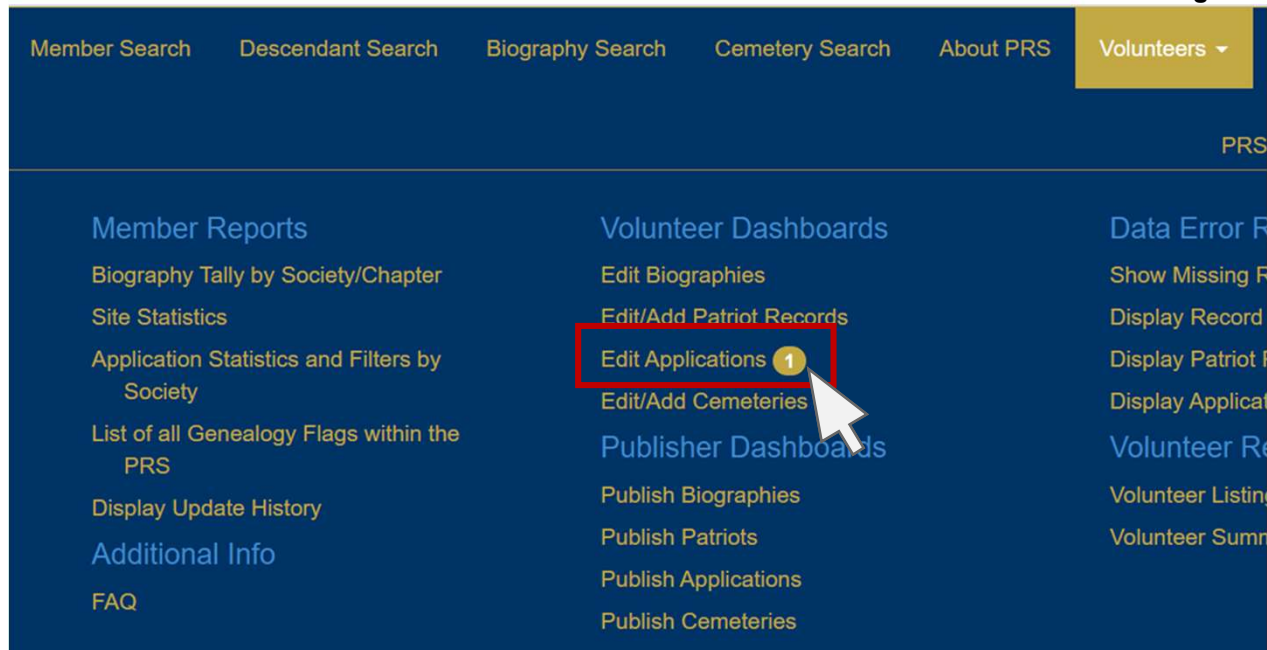


Image 8

ID	ProdID	VolunteerID	ACN	PatriotID	PatriotName	MemberNatNum	MemberNameFirst	MemberNameMiddle	MemberNameLast	MemberNameSuffix	Record Age (Days)	Actions
319143	28023	799	68089	336229	Benjamin DYER	166040	Gerald	Clyde	Peppel		2	
319144	49726	799	68088	336229	Benjamin DYER	182567	Larry	Alan	Magdy		2	
319159	265910	602	105735	262362	Jacob KOLB/KULP	225467	David	Elmer	Glass		2	

- There are three Action Icons you can select from in the far right column (Image 9).

Image 9

ID	ProdID	VolunteerID	ACN	PatriotID	PatriotName	MemberNatNum	MemberNameFirst	MemberNameMiddle	MemberNameLast	MemberNameSuffix	Record Age (Days)	Actions
319143	28023	799	68089	336229	Benjamin DYER	166040	Gerald	Clyde	Peppel		2	[Edit] [View] [Delete]
319144	49726	799	68088	336229	Benjamin DYER	182567	Larry	Alan	Magdy		2	[Edit] [View] [Delete]
319159	265910	602	105735	262362	Jacob KOLB/KULP	225467	David	Elmer	Glass		2	[Edit] [View] [Delete]



Edit the changes you've made. Clicking on this reopens the Application edit screen and allows you to continue making edits.



View the changes you've made, but does not allow you to edit. As the name suggests, you can open the Application Edit screen to view but not edit.



Deletes the changes you've made and takes the record out of your queue. The record maintains the last Published details.

PLEASE do not leave
Unsubmitted Edits in your
work queue for over one or
two days.

Keep track of your work.

