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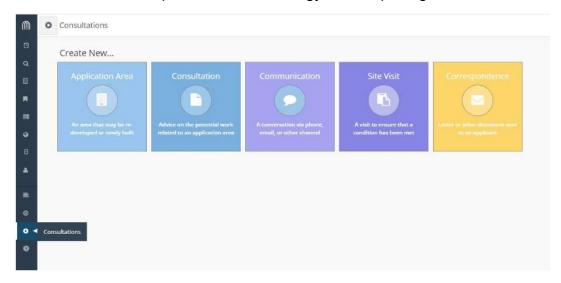
Introduction

Arches for HERs is a new platform for Historic Environment Records (HERs) which incorporates both an inventory system as well as a new heritage management tool: the consultations resource model.

Please note that the images used in this guide have been taken from an existing instance of the software, in this case the Greater London Historic Environment Record (Keystone), and are used for the purpose of illustration only and may therefore contain variations in layout or labelling from the current version of the software.

Workflows

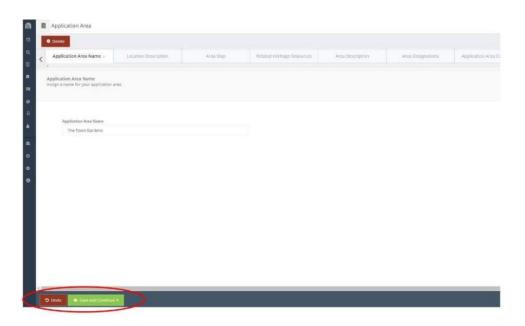
In the Greater London HER instance of Arches for HERs, a number of prescribed workflows have been created based upon elements of the planning Consultations process. These guide the users through each stage, prompting appropriate data entry and interactions, and insuring mandatory data is entered before they are able to proceed to the next step. These workflows can be used in conjunction with the standard Arches for HERs Resources and offer a degree of flexibility that allows the user to discover their preferred methodology for completing the Consultations process.





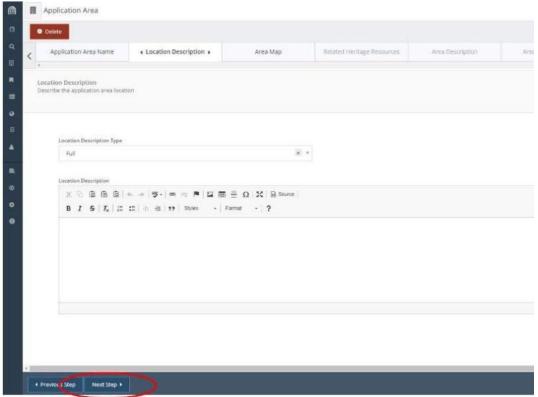
Application Area Name

Insert the Application Area name in the free-text node. Select the **Save and Continue** button, or the **Undo** button to re-enter the name.



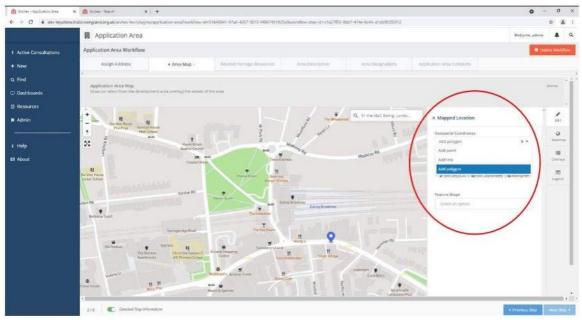
Location Description

When the Application Area Name has been saved, the next tab in the workflow, the Location Description, will open. This is a free-text node facilitating the entry of descriptive text specifying the extent of the Application Area. This element of the workflow is not mandatory, and so you can choose to leave this blank and instead move on through the workflow by selecting the **Next Step** button at the bottom of the screen.



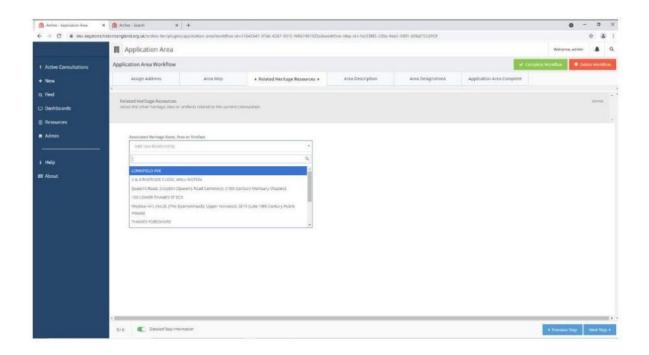
Area Map

This tab contains the same tools and functionality for creating spatial features as occur elsewhere in Arches for HERs.



Related Heritage Resources

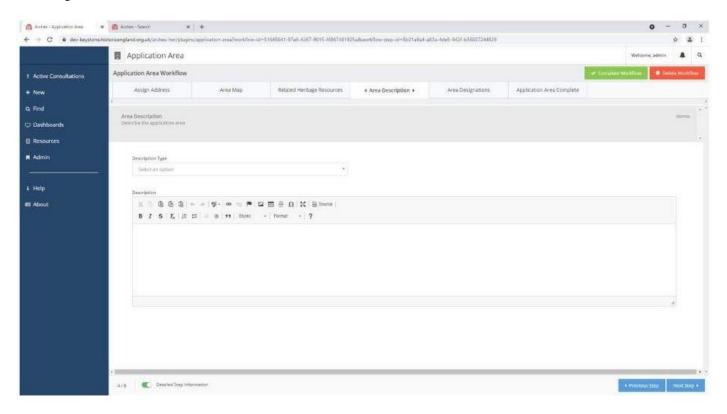
The Application Area can be associated with other Arches for HERs Resources (in this case Monuments, Areas and Artefacts) by retrieving and selecting the appropriate Resource from the drop list of values that appears when text is entered in the related Heritage Resources node.



Area Description

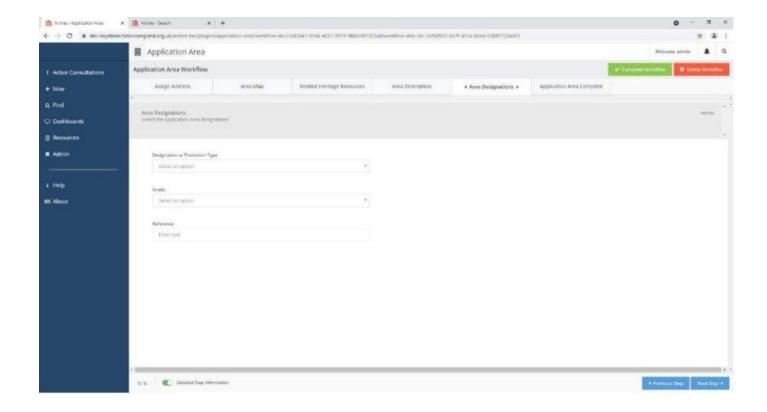
Add a more detailed description of the area can be entered in this tab if the address alone does not accurately portray a location.

For example, the site is 200m north of the entrance to the field and approximately 150m south of the long barrow.



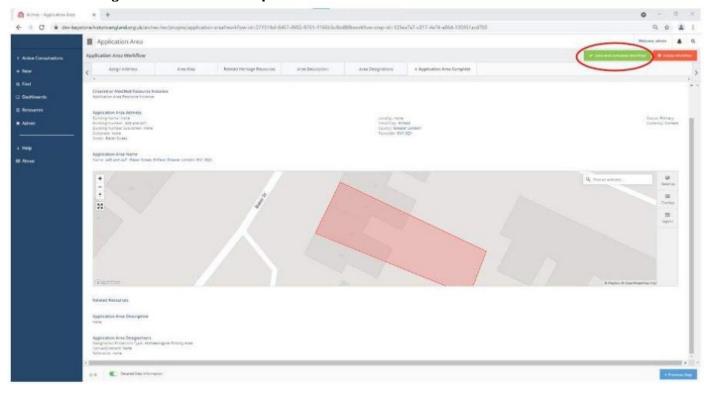
Area Designations

Where the Application Area occurs in a location where some form of designation or protection has already been applied, the appropriate designation/protection type can be selected from a list of values available via the drop-down menu



Application Area Complete

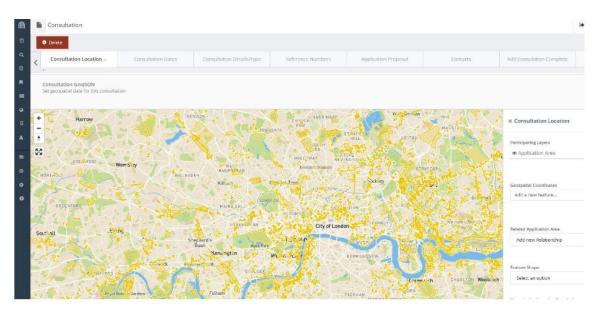
The final tab in the Application Area workflow allows the user to review the data they have entered before selecting the **Save and Complete Workflow** command.





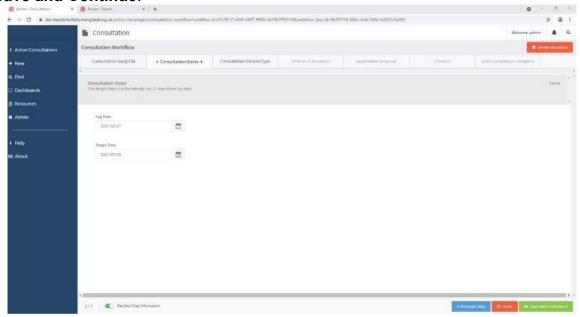
Consultation GeoJSON

This tab contains the same tools and functionality for creating spatial features as occur elsewhere in Arches for HERs. A spatial feature must be added before the user can proceed to the next stage in the workflow.



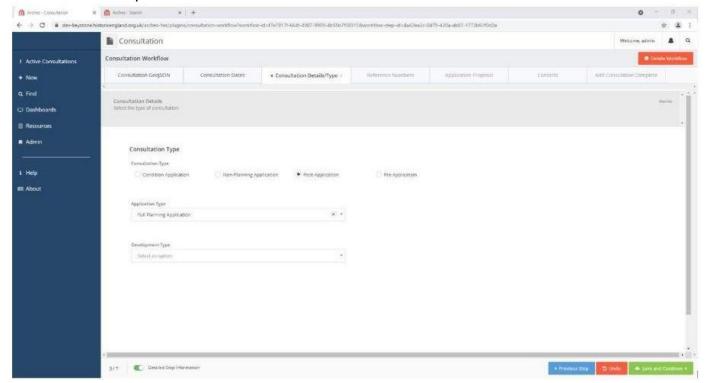
Consultation Dates

Enter the date the consultation was logged into the **Log Date** node: either enter the date in yyyymm-dd format or click in the node and select a value from the calendar. The **Target Date** field will auto-fill with 21 days from Log Date (this date can be overwritten if the target date is not 21 days). Select **Save and Continue**.



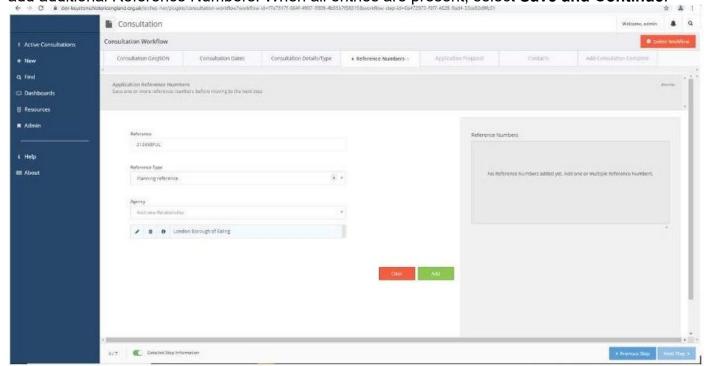
Consultation Type

Assign a **Consultation Type** by selecting the appropriate radio button (for example, *Post-Application*). Assign the appropriate **Application Type** and **Development Type** by selecting a value from the drop-down menu accessible via each node. Select **Save and Continue**.



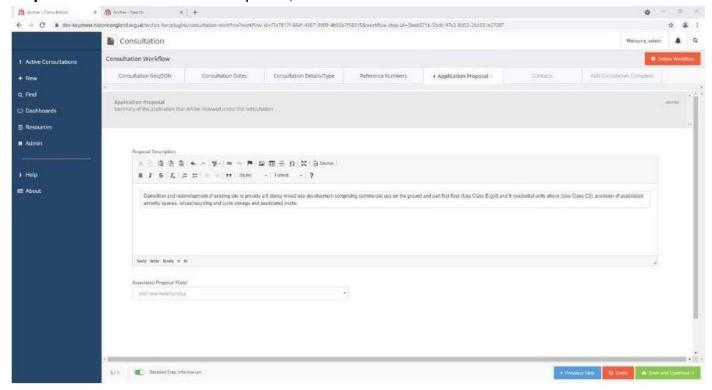
Reference Numbers

Insert the relevant Reference number (for example, a planning reference number) into the **Reference** text box. Select the **Reference Type** from the drop-down list of values. Add the name of the **Agency** (or organisation) which relates to this reference number (for example, the Local Planning Authority which assigned the planning reference): insert the name of the agency (which should first be present as an Arches for HERs Resource in its own right) in the node and select the matching entry from the drop-down list. Select **Add**. This process can be repeated to add additional Reference Numbers. When all entries are present, select **Save and Continue**.



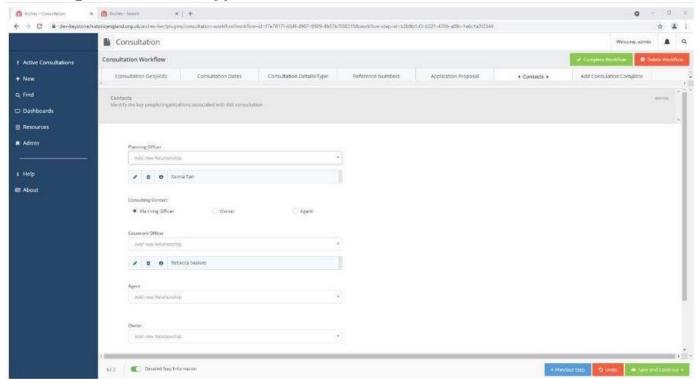
Application Proposal

Descriptive text can be pasted into the **Proposal Description** node. If the consultation was received in the form of a letter this could be added as an **Associated Proposal File**, first insuring the file has been recorded as a Digital Object within Arches for HERs. Once it exists as a Digital Object it can be retrieved and selected by inserting its name or identifier in the **Associated Proposal File**/s node. When completed, select **Save and Continue**.



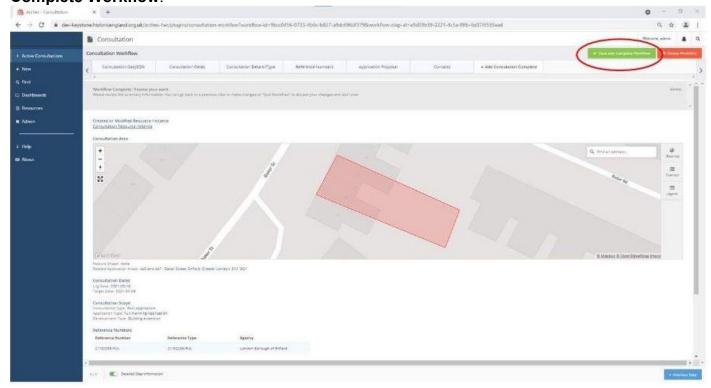
Contacts

The Contacts tab facilitates the recording of details for the following: **Planning Officer**, **Casework Officer**, **Agent**, **Owner** and **Applicant**.

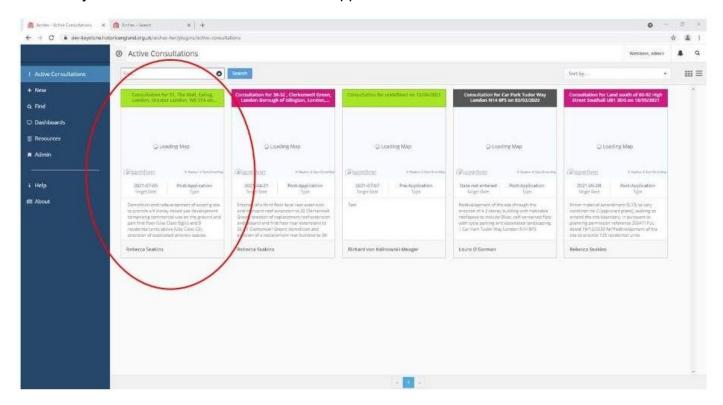


Add Consultation Complete

Review the Consultation workflow using the *Add Consultation Complete* tab. Select **Save and Complete Workflow**.



The newly created Consultation should now appear in the list of **Active Consultations**.

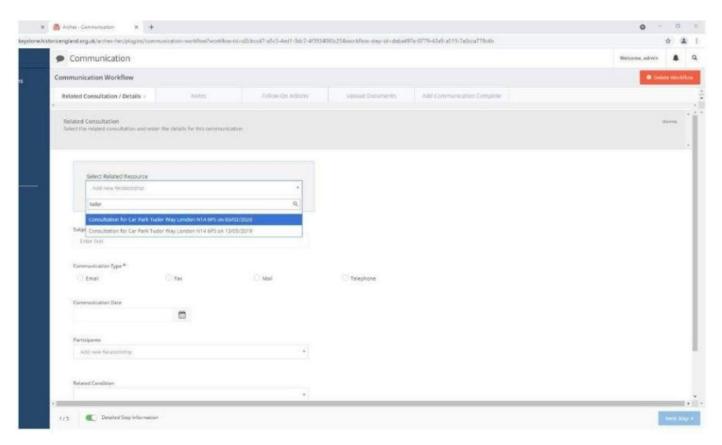




Related Consultation/Details

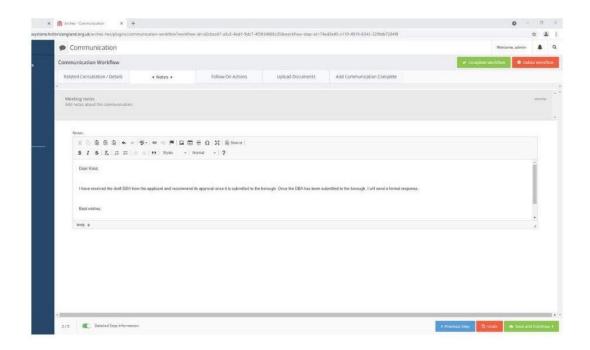
To link the communication to a Consultation, navigate to the **Select Related Resource** drop-down and search for the desired Consultation. Insert a **Subject** (for example, 'Approve draft WSI'). Select the appropriate Communication Type using the radio buttons (for example, Email) and enter the Communication Date.

To add Participants, insert a name into the Participants text box and select the desired person from the drop-down list (the individual should first be recorded as an Arches for HERs Resource). To assign a **Related Condition**, select the relevant value from the drop-down list. Select **Save and Continue**.



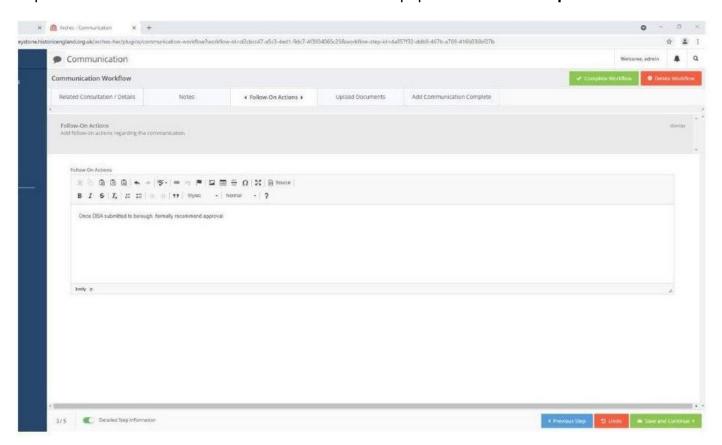
Notes

Add the content of the communication to the **Notes** node (for example, pasting the email into the node, or adding notes based upon a telephone conversation etc.). Select **Save and Continue**.



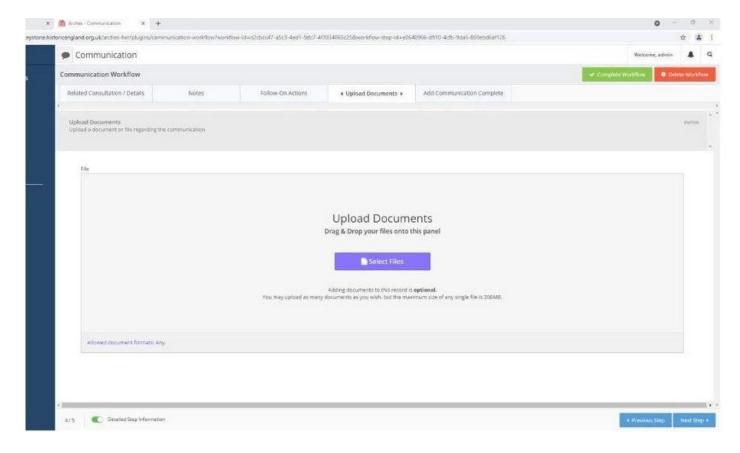
Follow-on Actions

Use the free-text node to describe any follow-up actions. This may be your email reply or actions required. Select **Save and Continue** if the text box is populated or **Next Step** if left blank.



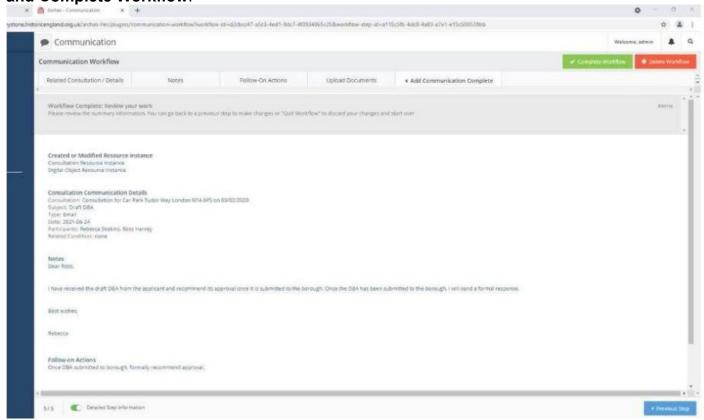
Upload Documents

Digital files related to the communication can be added by either dragging and dropping the file or by browsing to a saved file by clicking **Select Files**. These files, which can be in any format, may include the email itself, a pdf letter sent by a contact, or a WSI etc. Select **Save and Continue** if you have uploaded documents, or **Next Step** if not.



Add Communication Complete

This tab allows the user to review the information entered in the workflow. If satisfied, select **Save and Complete Workflow**.

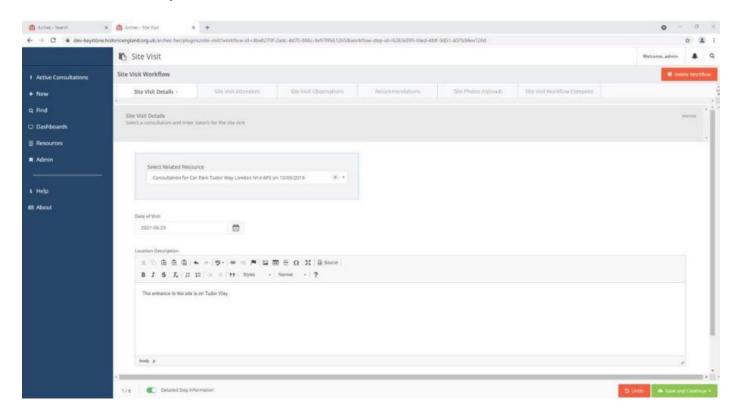




This workflow enables the recording of any site visits made in relation to a Consultation. It is a place to store notes of observations, any recommendations made, and provides an easily accessibly place to store photographs and to record associated metadata.

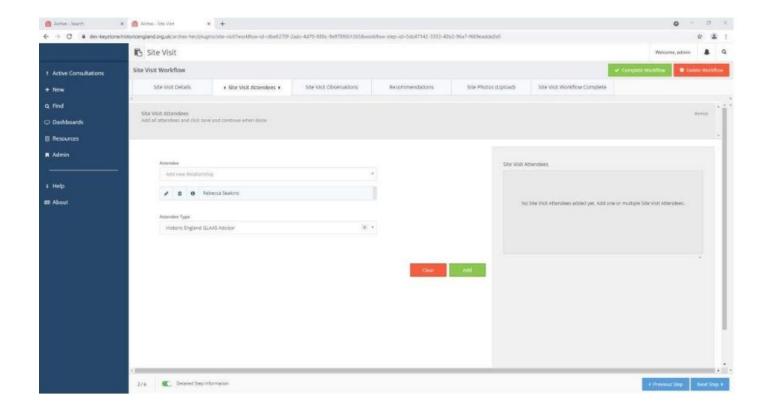
Site Visit Details

Navigate to the **Select Related Consultation** drop-down and retrieve the desired Consultation. When an entry is selected, further nodes will appear in the tab. Add **Date of Visit** and the **Location Description**. Select **Save and Continue**.



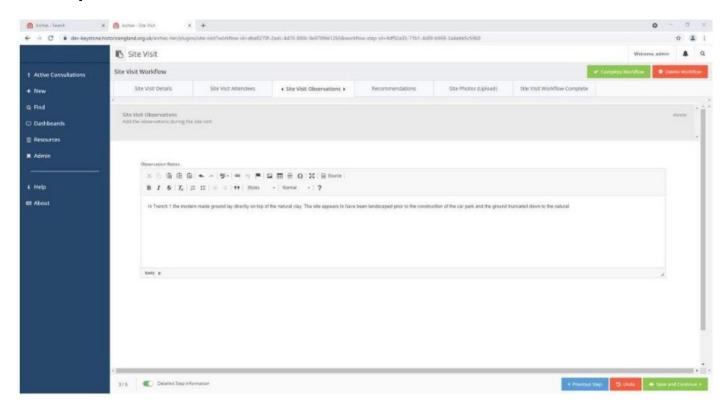
Site Visit Attendees

Add an attendee by selecting from the drop-down list (insuring the attendee has first been recorded as an Arches for HERs Resource). Multiple attendees can be added before selecting **Save and Continue**.



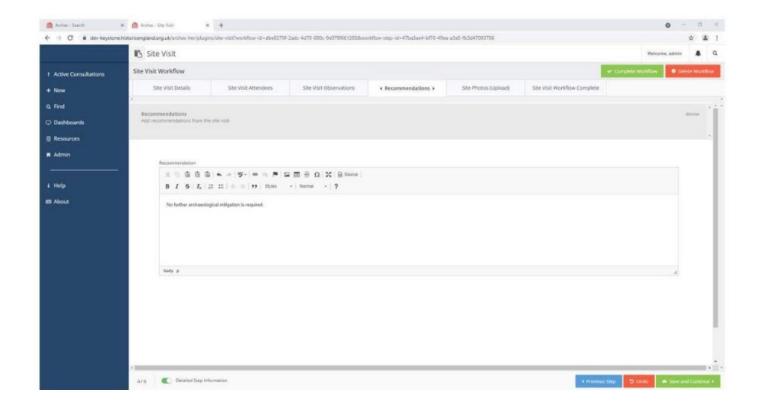
Site Visit Observations

Insert any observations made in the free-text node and select Save and Continue.



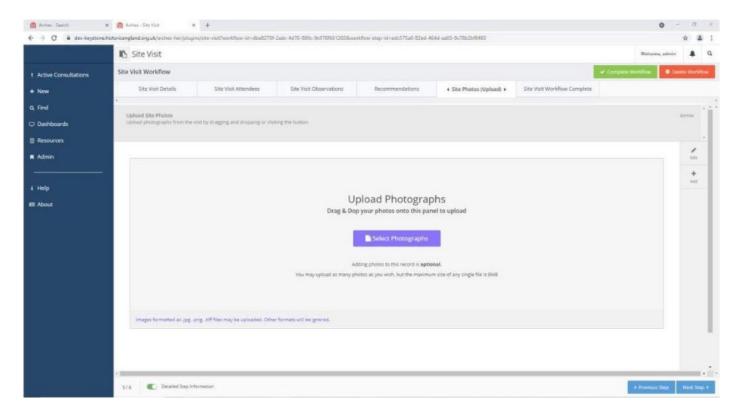
Recommendations

Insert any recommendations made in the free-text node and select Save and Continue.



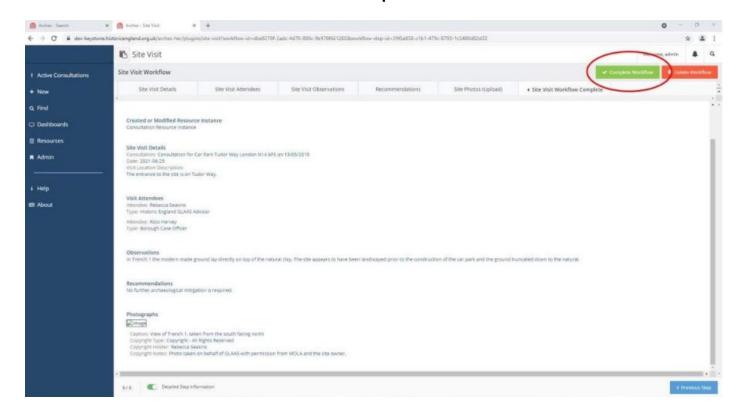
Site Photos (Upload)

Photographs can either be dragged and dropped onto the **Site Photos (Upload)** tab or you can browse to the saved file location using **Select Photographs**. These should be .jpg, .png or .tiff files. Once the photograph has been uploaded, select **Edit** and enter the appropriate metadata for the image, such as a caption, copyright type, copyright holder and copyright note text. Once added, select **Save**. Multiple photographs can be added.



Site Visit Workflow Complete

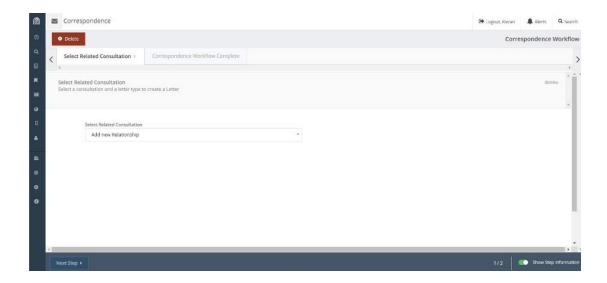
Review site visit details and select Save and Complete Workflow.



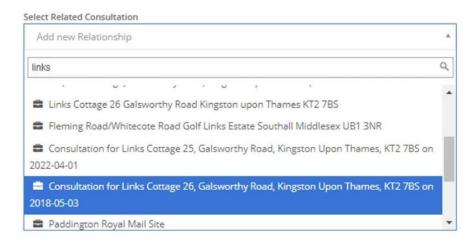


This short workflow facilitates the automatic generation of an Advice Letter.

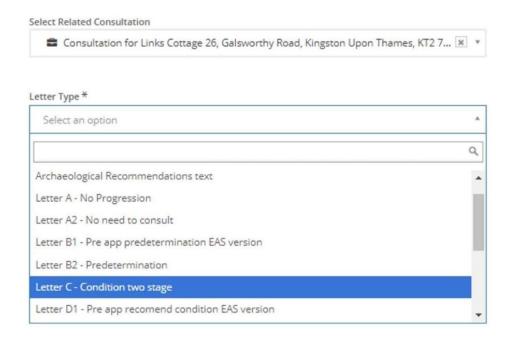
In the **Select Related Consultation** node, retrieve the Consultation for which you wish to create an Advice Letter.



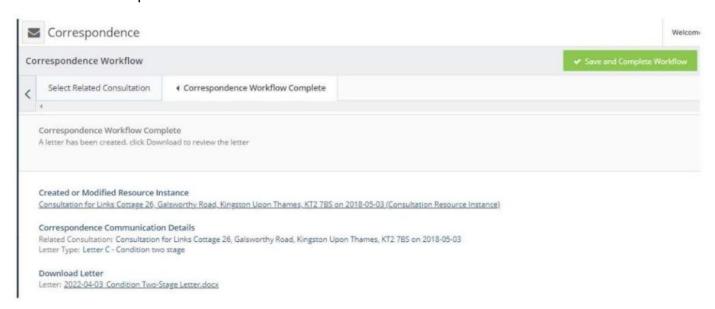
Insert a name or identifier in the node and select the matching entry from the drop-down list of Consultations.



From **Letter Type** select the type of letter you wish to generate (It is possible to create a blank letter with just the contact details, references, and proposal details). Once selected click **Save and Continue**.



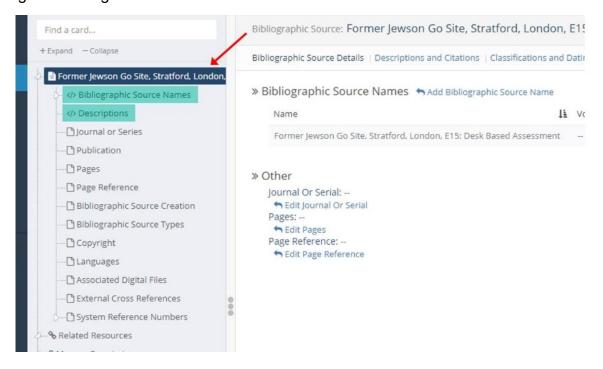
This will generate the letter as a Word document, which can be downloaded, and also link the letter to the correspondence associated with the Consultation. Select **Save and Complete Workflow** to complete the workflow.



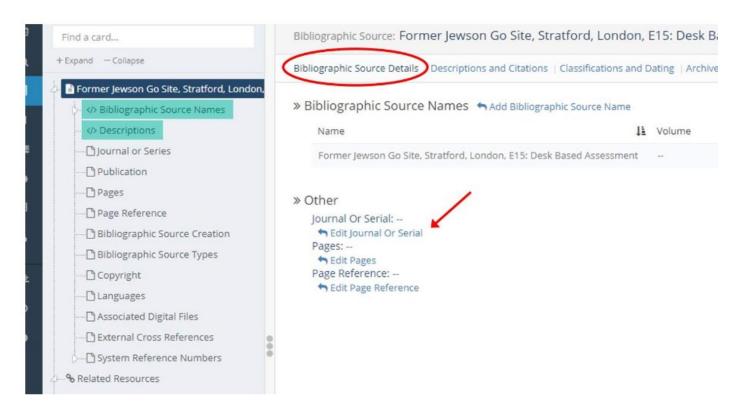
Resource Reports

The Resource Report is available to view at all times whilst a record is open for editing or as a part of a set of search results. Within the Resource Manager interface for creating and editing data, it is accessible by selecting the very top level in the tree view on the left-hand side of the screen.

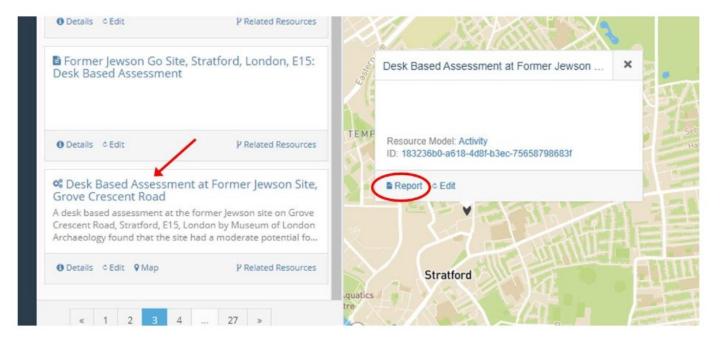
Within the Resource Manager role, the Resource Report presents an alternative method of navigating and editing the contents of the record.



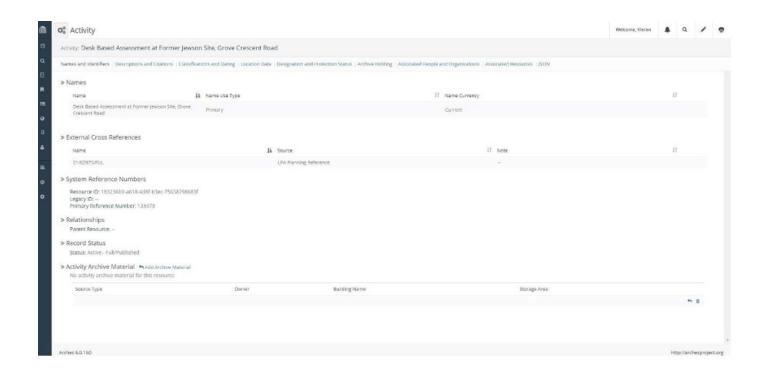
The data is presented in a series of selectable thematic tabs, each containing a number of nodes. A link attached to each node provides a shortcut to the relevant card in which values can be added and edited



When a record is present within a set of search results, selecting the Resource name, or identifier depending upon the resource, of one of the records in the Results list will open the Resource Report in a new tab. Similarly, selecting the Report link in the pop-up that appears upon selecting a map feature will open the Report in a new tab.



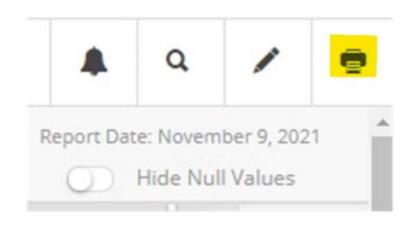
The data is presented in a series of selectable thematic tabs.

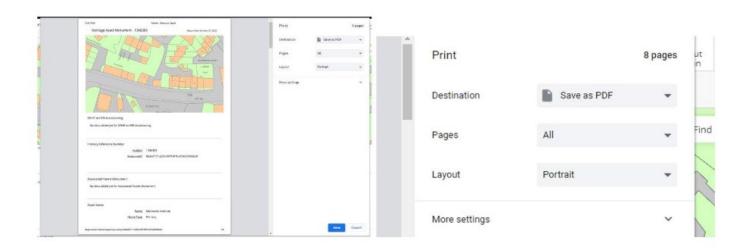


In the top-right corner of the screen is a series if icons.

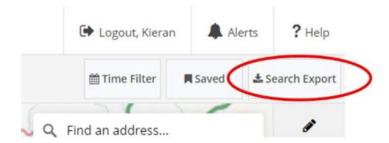
The bell-shaped *Alerts* icon allows the user to view any alerts that have been forwarded to them relating to data downloading (see *Export Search Results*). The *Search* icon will open the search interface, and the *Edit* icon will open the Resource in the Resource Manager role.

Selecting the *Print* icon in the top-right corner of the Resource Report tab allows the user to save the current report as a pdf or print it directly.





Export Search Results



Export Search Results

1. Format
Select the format you'd like for your export data. (tile excel and geojson formats require a resource type filter)

• csv
html
shapefile
tile excel
geojson url

2. Coordinate Precision
Tell us how many decimal places of precision you'd like for geo-data results

6

3. Report Link
Only applicable to CSV and shapefile exports
Include the report link in the export?

Winchester

Download

Once a search has been executed and records have been retrieved, this function enables the creation of exports in a number of formats such as csv and html as well as facilitating the export of features as a shapefile.

Select the Search Export icon.

The Export Search Results panel will open.

Select which format you would like to export (such as csv, html, shapefile etc.).

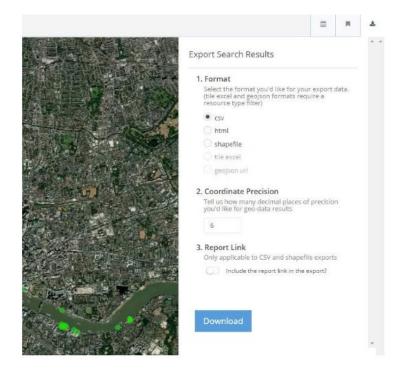
if exporting as a shapefile you can specify the coordinate precision (the default value is 6).

There is an option available to include a link to the Resource reports.

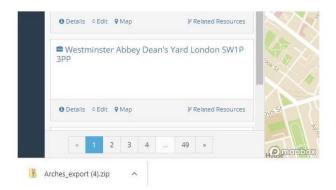
Select the **Download** button to generate the export, which will be automatically saved to your Downloads folder.

CSV

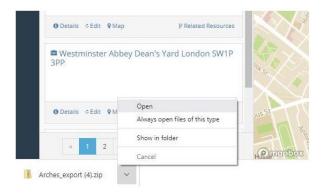
Arches will create a separate csv output for each
Resource Type included in your search results
which, for example, may feature Monuments, Areas
and Activities. These csv files will be downloaded to
the user's own Downloads folder in a zip file.



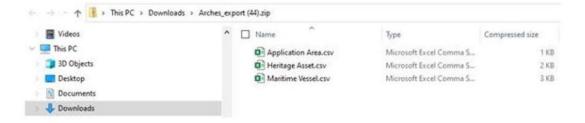
The export is accessible through the link that will appear in the bottom-left of your screen.



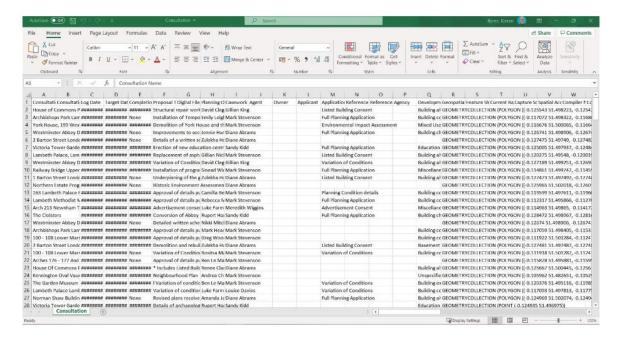
Select the arrow icon to open a list of options.

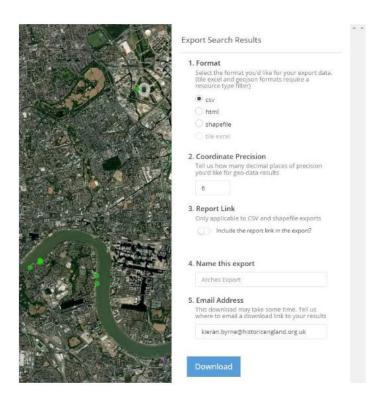


Opening the zip folder will display the separate Resource Type exports contained within.



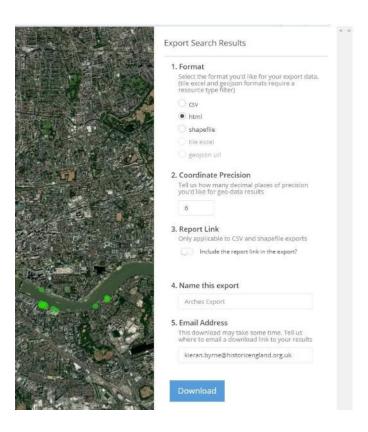
Select each to open.

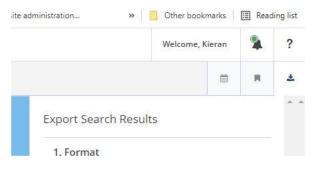




Should your results contain more than one thousand records the Export Search Results panel will contain additional options for naming the export and recording your email address (though this should default to your correct work email address if you are logged in). As exporting such a large amount of data may take some time, these additional options enable the *Alerts* facility.

When you export is complete, you will receive an email containing a link to your export as well as an Alert as indicated at the top of the screen.

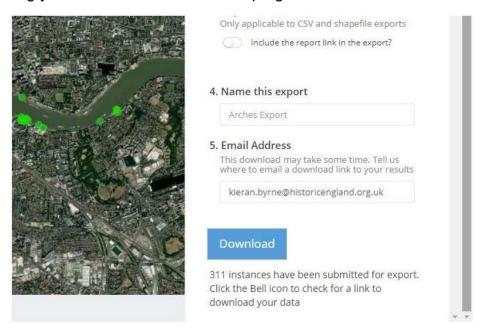




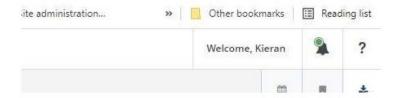
html

Arches will create a separate html output for each Resource Type included in your search results. If more than ten records have been retrieved, the Export Search Results panel will expand to allow you to create a name for the output and specify an email address (usually auto-populated) where a link to the download will be sent.

When you select **Download**, a message will appear confirming the number of records in the export and directing you to the Alerts icon at the top-right corner of the screen.



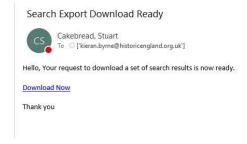
A green circle will be present indicating a new alert. Select the Alerts icon to open it.



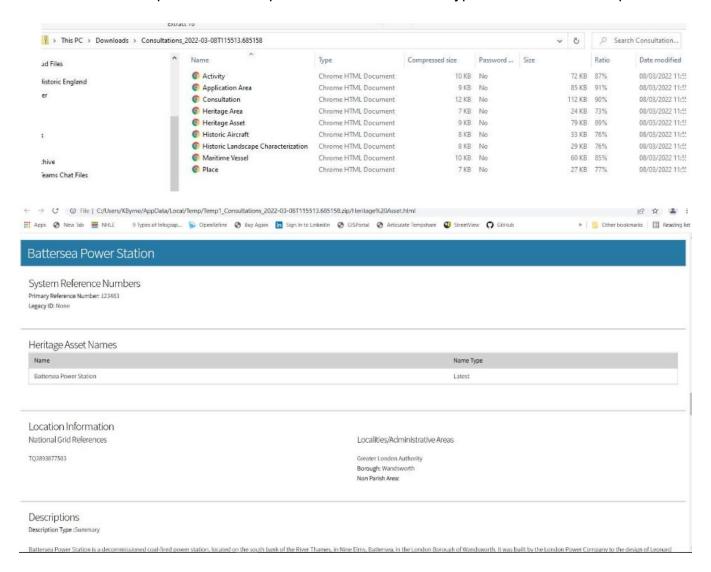
Within the notification you can choose to dismiss the export if no longer required or download the file.



At the same time you will also receive an automated email from the System Administrator also containing a link enabling the download of the exported file.



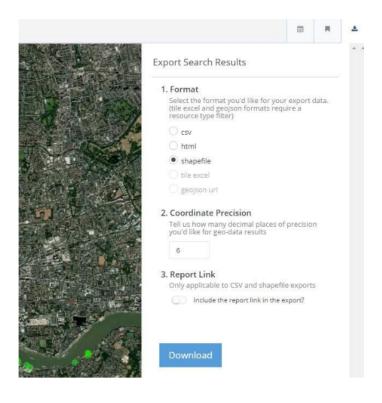
The file contains separate HTML reports for each Resource Type contained in the export.

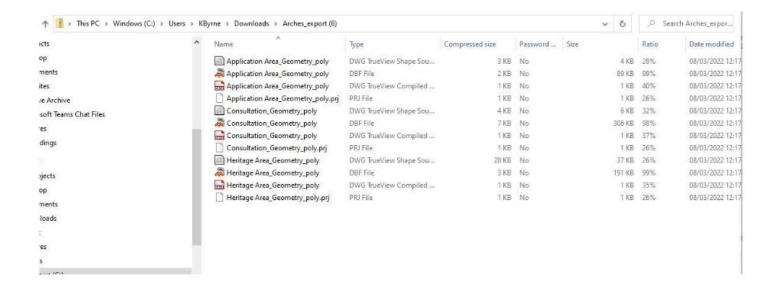


shapefile

Arches will create a separate shapefile for each Resource Type included in your search results which, for example, may feature Monuments, Areas and Activities. These files will be downloaded to the user's own Downloads folder in a zip file.

As with CSV exports, should the number of instances exceed 1000, the Export Search Results panel will expand to include a field in which to name the export and an Email Address to which a link will be sent when the export is ready (an Alert will also be sent and will be accessible via the Alerts icon at the top-right corner of the screen).





Export Search Results 1. Format Select the format you'd like for your export data. (tile excel and geojson formats require a resource type filter) O csv O html shapefile O tile excel geojson url 22Heritage%20Asset%22%2C%22inverted%2 2%3Afalse%7D%5D Copy to clipboard 2. Coordinate Precision Tell us how many decimal places of precision you'd like for geo-data results 6 3. Report Link Only applicable to CSV and shapefile exports Include the report link in the export?

Download

geojson url

These need to be created separately for each group of Resource Model Records selected. This prepares a URL which can be sent to users to view selected data.