E-Gov Basics Online Reference Manual

This manual is intended for online use. This will ensure that you are using the most current version.

CONFIDENTIAL!

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E-Gov Link
4303 Hamilton Avenue
Cincinnati, OH 45223

E-Gov Helpdesk:
513-591-7361
egovsupport@egovlink.com
www.egovlink.com/egovsupport

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Getting Started

Accessing the Site

Connect to the Internet as you normally do
Go to your E-Gov Link site. Your Site administrator will provide you with the web address/URL
In the Username space, enter the Username and Password provided by your site administrator.
Click the Log In button to enter the site.

Automatic Login

If you would like to be logged in automatically the next time you visit the site, click once on the checkbox indicating that option. At login, a cookie will be stored on your PC that will automatically enter your login information the next time you access the site from that PC. This cookie allows you to go straight to your organization's E-Gov Link home page when you access the URL.
When you are finished with the site, do not log out, but rather, just close the window or navigate to another website. (Logging out will turn off the auto-login feature.) If you would like to disable the automatic login, simply log out of the site when finished.

Forgotten Password

If you cannot remember your password, click on the Forgot Your Password? link below the Login button.
On the screen that comes up, enter either your email address or username in the appropriate field and click the Go link directly below that field.
Your login information will be emailed to your registered email account specified in your user profile.

Security Management (E-Gov Security Manager)

- You have complete control over access to your administrative site.
- Allows designated staff to control access to administrative functions of the website.
- Access to each area (CRM, Payments, Documents, and Calendar) and each specific function can be separately controlled.
- CRM access can be limited to own requests, own department requests, or all requests.
- Document access can be limited to particular document folders or all documents
- Only specific individuals will have access to security management.

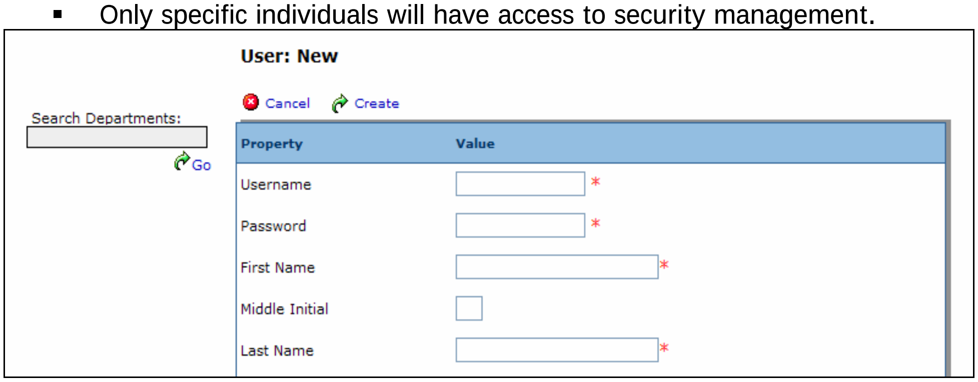


Figure 1: Adding Users

Add Users

- From the Navigation menu select Security>Add Users
- Input the desired/required information (Figure 1)
- Then Click the create link (This will give you the option to add user permissions)

Edit Users

- From the Navigation menu select Security> Edit Users
- Navigate to or search for the user you would like to edit (Figure 2)
- Select the user (Figure 3)
- Click the Edit link to update account information such as name, email, address etc.
  - Click the update link to save any changes made
  - Click the cancel link to cancel any changes that have been made
- Click Delete link to delete the user
- Edit User Groups
  - From the Navigation menu select Security> Edit Users
  - Move the groups from Available groups to Already in Groups to allow certain access to the user

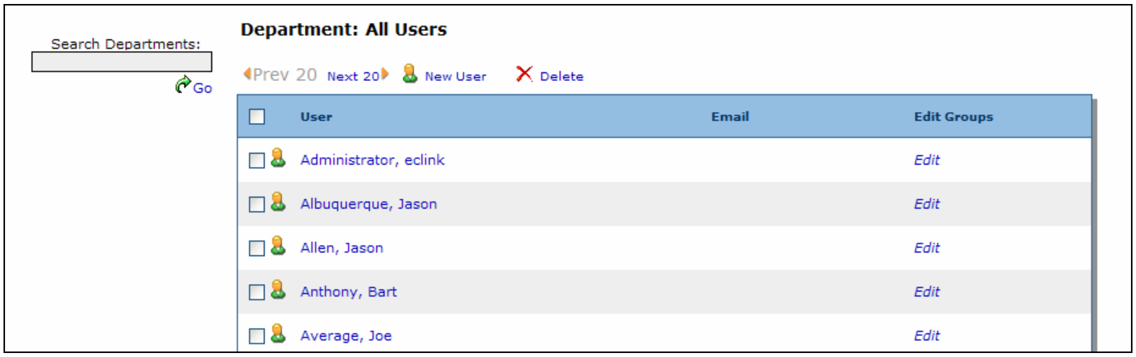


Figure 2: Edit User List

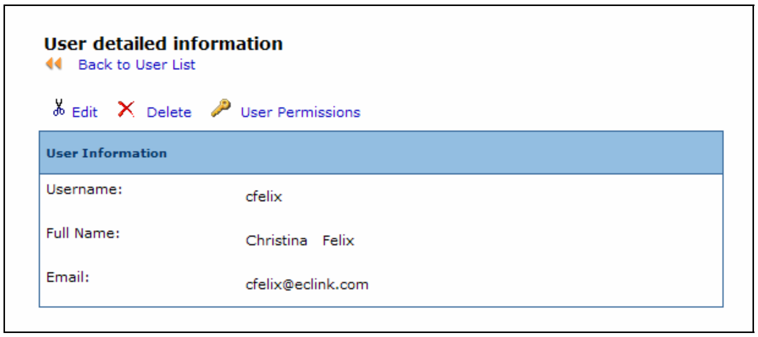


Figure 3: Selected User

User Permissions

- Using the navigation menu select Security> User Permissions
  - This can also be done when editing a user
  - Click Save to save the permissions granted or
  - Click copy permissions to copy the permission from a one user to another user; click copy permissions again
  - *Do not copy permissions from the main administrator*

Departments

- This allows you to add departments or to change department names

This is used in the CRM to sort a report by dept

Overview

Action Line (Citizen Request Management (CRM))

Give your residents and local businesses an easy way to use the Internet to make suggestions, request information, and request action-any time of day or night. The right person on your staff will be notified by email, so they can follow-up promptly on each request. All web requests and responses are recorded in a central database. Input phone or walk-in requests for a complete tracking and monitoring system. Can be used for service requests, government records requests and communications to officials.

Payments

Give the public an easy way to make various types of payments (including taxes, utilities, fines and fees) by credit card-any time of day or night. Which are processed through PayPal's secure site.

Document Management

Now any authorized staff member can quickly and easily upload documents to your website from any PC-no web skills needed. All documents are visible in a single location, but you can also link to them from anywhere on your website. Document search makes it easy for users to find the document the need. Can be used for downloadable forms, council agendas and minutes, ordinances, and newsletters.

Community Calendar

Allows non-technical staff to maintain a visual calendar with information about all your events. Calendar display shows name of event in date box. Users click for details. Details can include links to maps, agendas, etc.

Security Management

You have complete control over access to your administrative site. Allow designated staff to control access to administrative functions of the website. Access to each area (Action line, Payments, Documents, and Calendar) can be separately controlled. Action line access can be limited to own requests, own department requests, or all requests. Payment access can be limited to a particular payment type or all payments. Document access can be limited to particular document folders or all documents. Only designated individuals will have access to security management.

Web Site Layout

E-GovLink is designed using cascading fly-out menus. The menus along the top left part of the screen help you navigate within the site from any page. The menu selections may vary depending on your user capabilities and your installation. The following menu options may exist on your installation: Action Line, Community Calendar, Documents, Payments, Subscriptions, FAQ, Citizen Registration, News Scroller, Security, Staff Directory, Job Postings, Bid Postings, and Logoff.

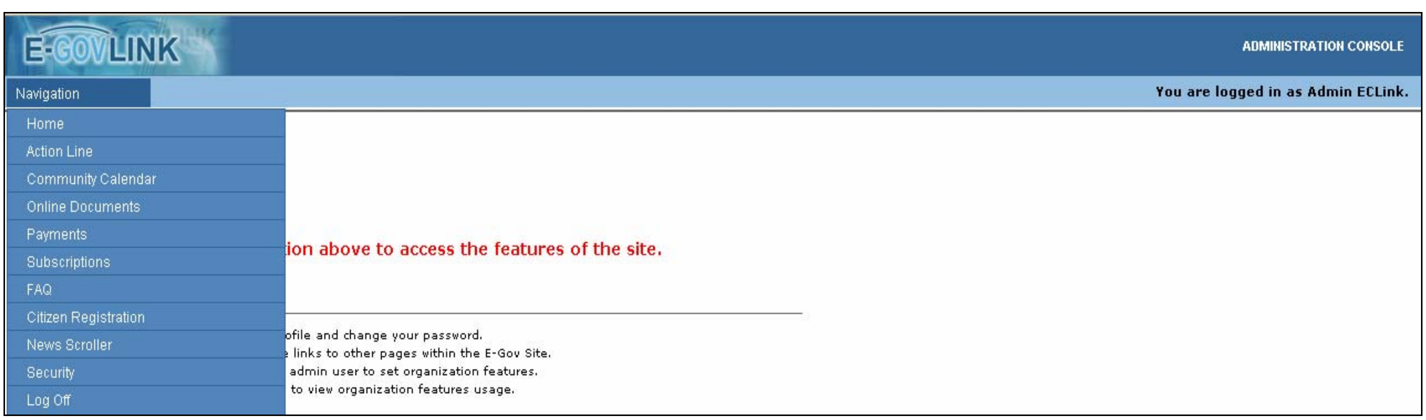


Figure 4: E-Gov Link Home

E-Gov Basics
Community Calendar
Adding an Event

- On the navigation menu go to Community Calendar>Create Events (Figure 5)
- Enter the appropriate information for the event
- If necessary, events can be placed in categories which are later used on the public side to sort the events
- You can add recurring events in the edit screen (see below)
- The Subject is the brief description or title of an event that appears in the monthly calendar view
- The details are listed below or as a link to the individual day

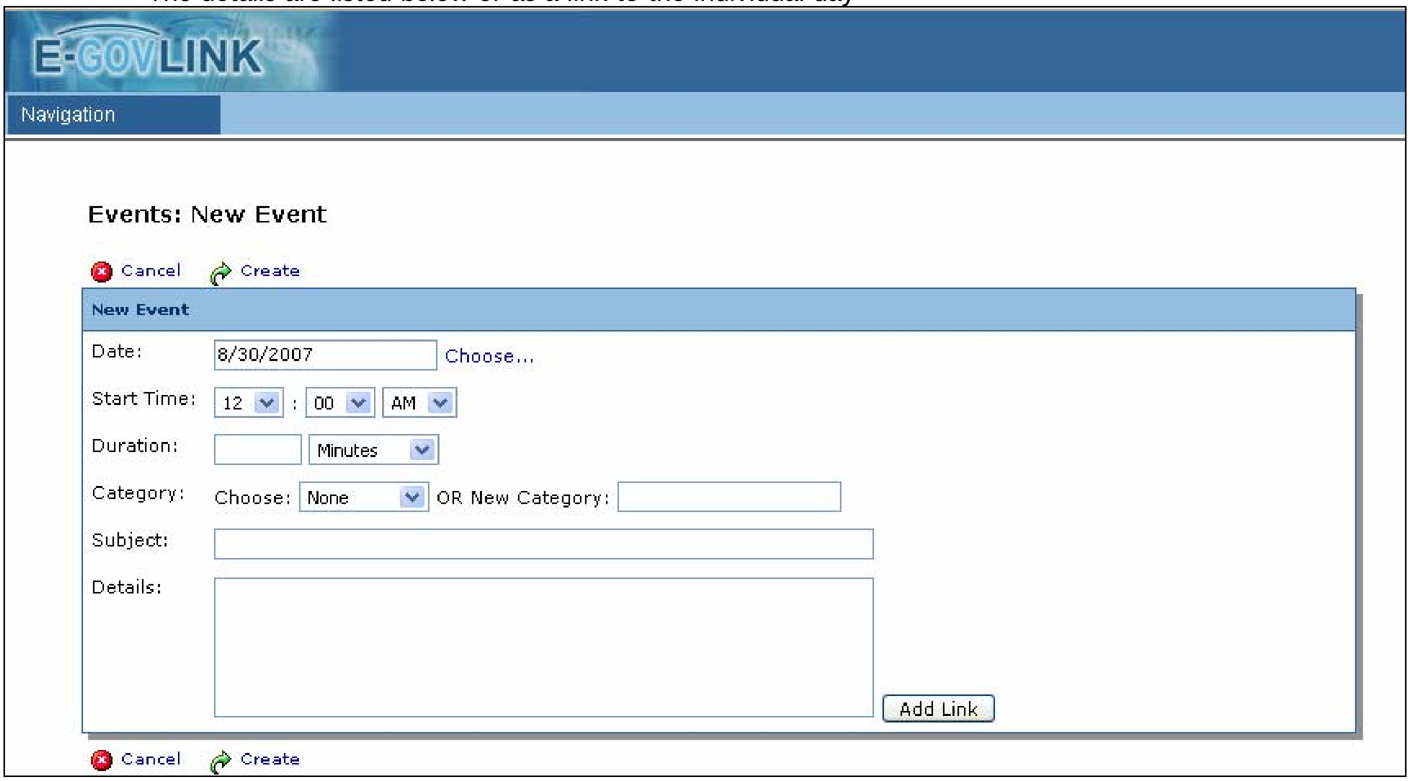


Figure 5: Creating a New Calendar Event

Adding a link to more information

- Place the cursor where you would like to add the link or additional information
- Click the add link button it will open a window pictured below
- You can link to a document, an action line form, a payment form, or to a URL
- Select the icon on the left of the item you would like to link to
- Add the text that you would like displayed in the Link Text field
- Navigate to the item you wish to link to, this is displayed in the file name field.
- Click the add link button

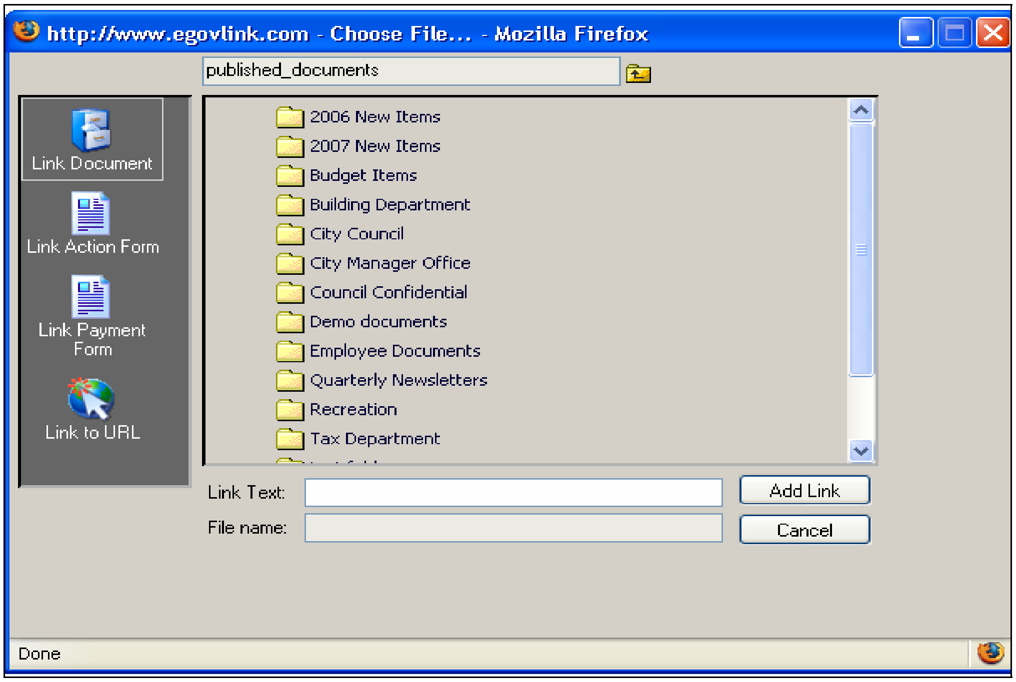


Figure 6: Adding a Link to a Calendar Event

Modifying an existing event

- Using the menu navigate to Community Calendar>Edit Events, click on the heading for the event you would like to edit
- Make appropriate modifications
- Click the Update link

Adding a recurrence to an existing event

*Note: You can create recurrences only after creating and saving an event

- Using the menu navigate to Community Calendar>Edit Events, click on the heading for the event you would like to edit
- Click the Choose Recurrence link
- Enter the parameters for the event and click create
- Note: once a recurring event has been set up they become individual calendar items that have to be deleted individually. We suggest limiting the recurring time frame to a year

Deleting an event

- Using the menu navigate to Community Calendar>Edit Events
- In the left column of checkboxes, select the events that you would like to delete
- Click the Delete link

Event Categories

- Using the menu navigate to Community Calendar>Event Categories the screen is pictured below
- Add a category by filling in the category name field and if applicable a color and click the create link
- Edit the name of a category by filling in the Change Category Name field with the name of the new category and select modify
- Delete an Event category by Selecting the Category from the dropdown menu under the Delete an Event Category (Bottom of Figure 7) and selecting the Delete link

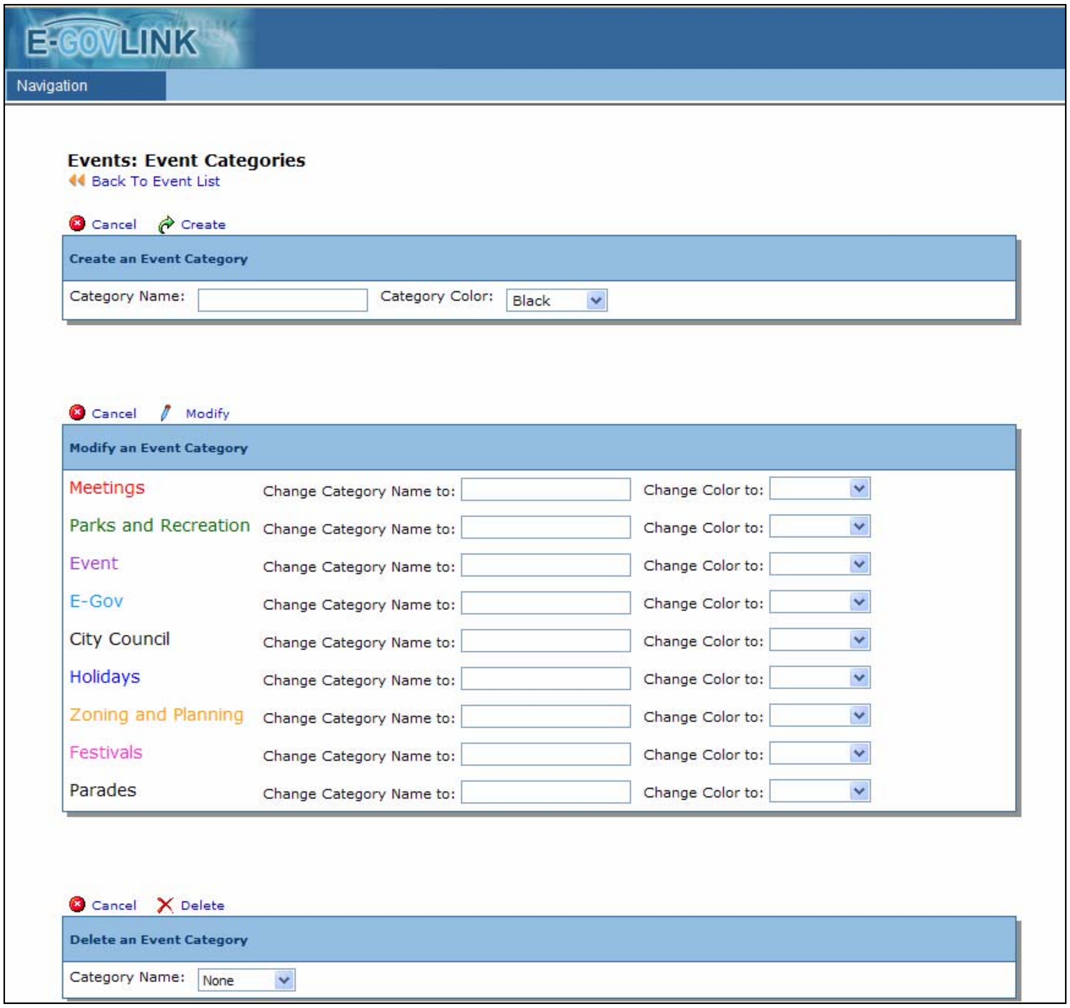


Figure 7: Event Categories

Action Line - Citizen Request Management (CRM)

- Give your residents and local businesses an easy way to use the Internet to make suggestions, request information, and request action—any time of day or night
- Turn your PDF forms into forms that can be completed online. Use for service requests (reporting potholes), applications (permits, licenses, registration) and communications to officials
- Input non-web requests for a complete request tracking and monitoring system

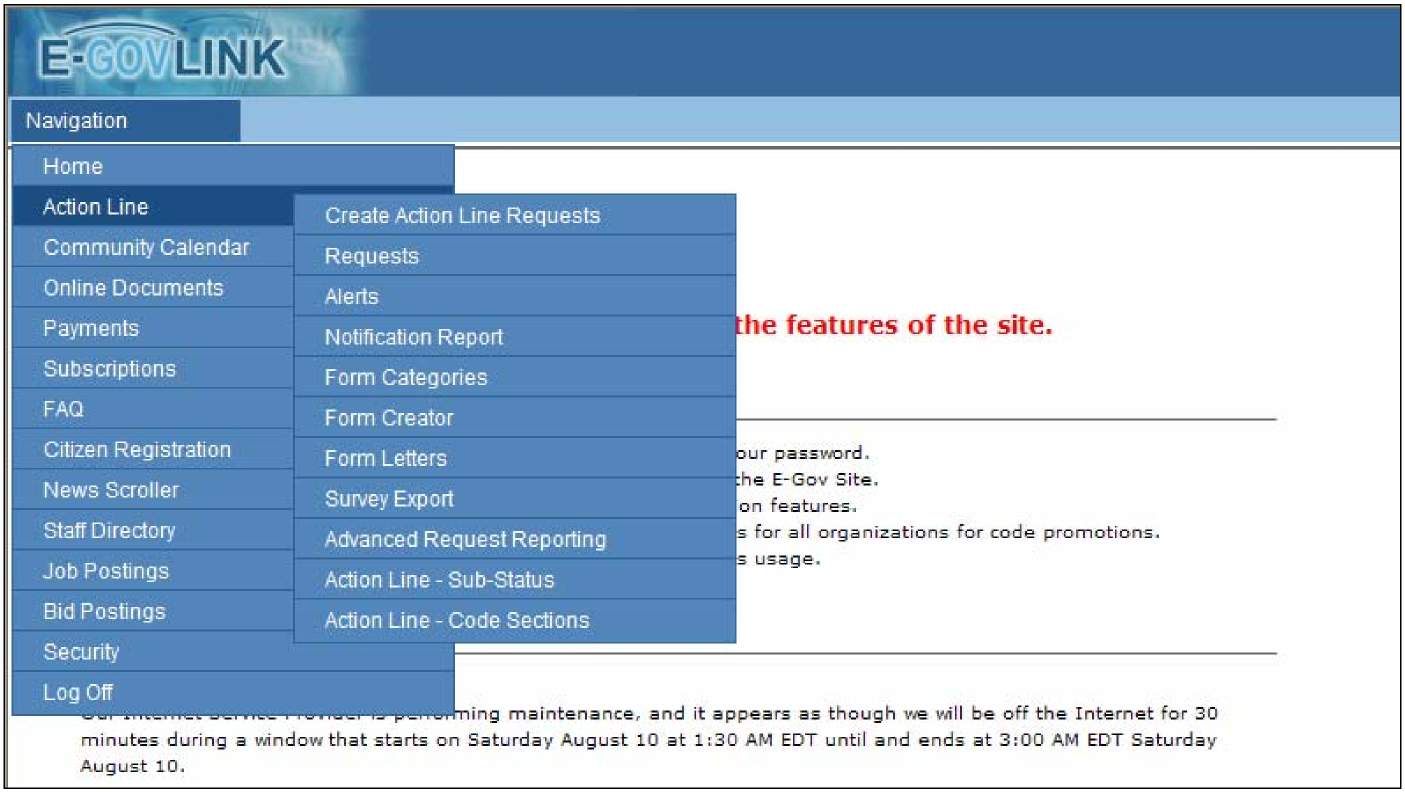


Figure 8: Citizen Request Management

Create Action Line Request
- This is the admin equivalent to what the public sees. This link takes you to a list of action line request forms that are available. Here you can submit action line requests for citizens that call, fax, mail, or walk in requests.

Requests (Manage Action Line Requests)
- This link will take you to the E-Gov Request Manager and/or Query/Reporting Tool. You will be able to view/edit all requests that have been submitted. You can also query the database.

Alerts
- This link will take you to the E-Gov Alert Manager. Here you can change the department, the category, and the person assigned to the task. You can also create notifications and escalations

Notification Report
- This link will take you to the Action Line Notification Report. This is a listing of all the forms in detail form. You can also manage these items just like the alerts section.

Form Categories
- This link will take you to Action Line Form Categories. Here you can create action line categories, edit the names of categories, change the viewing order of the categories, or delete a category or categories.

Form Creator
- This link will take you to the E-Gov Forms Creator. Here you can see all of the forms that have been made, edit those forms, and create new forms.

Form Letters (Option)
- This link will take you the form letters section. You can view, edit, or create new form letters in this section.

Survey Export (Option)
- This link takes you to the export form for surveys. You can select the form and date range and it will export the data to CSV (comma separated value).

Advanced Request Reporting (Option)

- This link will take you to the advance reporting options. You select a date range and a report type and then you can view the report with the variables you selected.

Action Line – Sub-Status

- This link will take you to the Sub-Status maintenance screen. Here you can add, edit, update or delete the Sub-Status. The Sub-Status is used to search for specific requests to which a Sub-Status has been applied.

Action Line – Code Sections

- This link will take you to the Code section maintenance screen. Here you will be able to add, update, or delete code sections. The Code Sections can be applied to action line requests and also used in form letters.

Creating an Action Line Request

- Here you can submit action line requests for citizens that call, fax, mail, or walk in requests.
- From the navigation menu select Action Line>Create Action Line Request
- This takes you to an categorized list of all of the available action line request forms.
- Select the appropriate request form and fill in the required information and anything else pertinent to completing the request.

Manage Action Line Requests (E-Gov Request Manager)

- Figure 9 provides a summary of all submitted requests. Various search/sorting options are available.
- By clicking on a specific request the details can be viewed and edited.

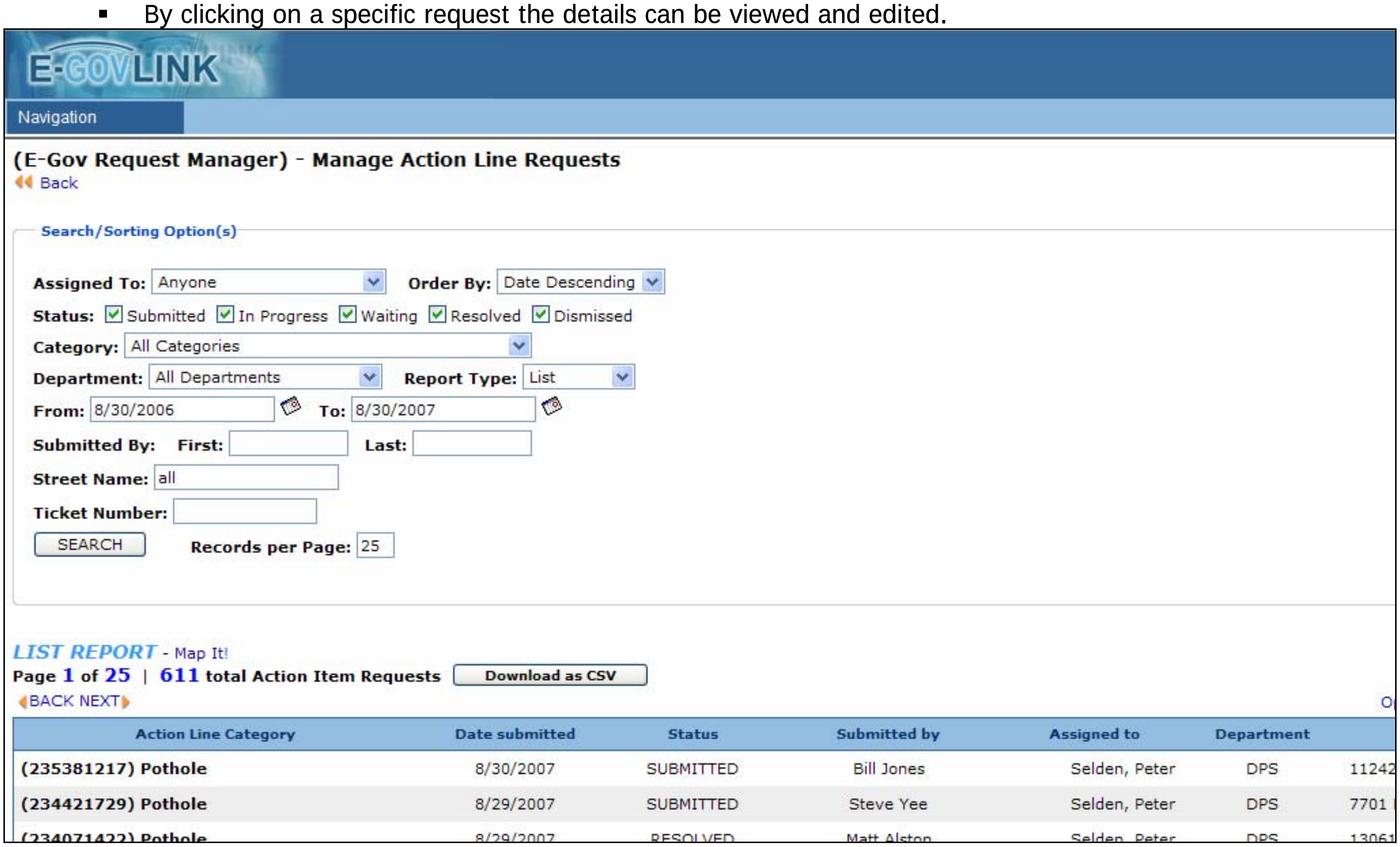


Figure 9: Action Line Requests

Editing an Action Line Request

- Using the Navigation menu Select Action Line>Requests
- This brings up a screen like Figure 9.
- Search for the Action Line Request you would like to edit and then select
- This will bring up the individual request and all the details.
- Here you can edit contact information, location, form information, admin only fields (CE Option), attachments (CE options), Update action Request, Send Email Notification, Code Sections (CE Options), Sub-Status (CE Options), and Form Letters (E-Gov Basics Option)
- To edit a particular section click the Edit link next to the appropriate section
- Change or add the information as necessary and click save

Request Activity Log

- Displays all of the activity associated with the Action Line. Includes Date and Time stamp along with the individual who updated the request and the change that was made. (Figure 10)

Update Action Request

- You can change the employee assigned to the action line request by selecting a person from the drop down menu.
- Change the status from Submitted to Inprogress, etc. by selecting the appropriate status from the drop down menu.
- Change the sub-status by selecting from the drop down men like above
- You can add internal communication that only admin users will see
- Add a note to Citizen (make sure to check the box next to send email to citizen to notify the citizen of the progress on the action line request)
- To save the changes just entered click Update Action Request
- The new changes will be displayed in the Request Activity Log

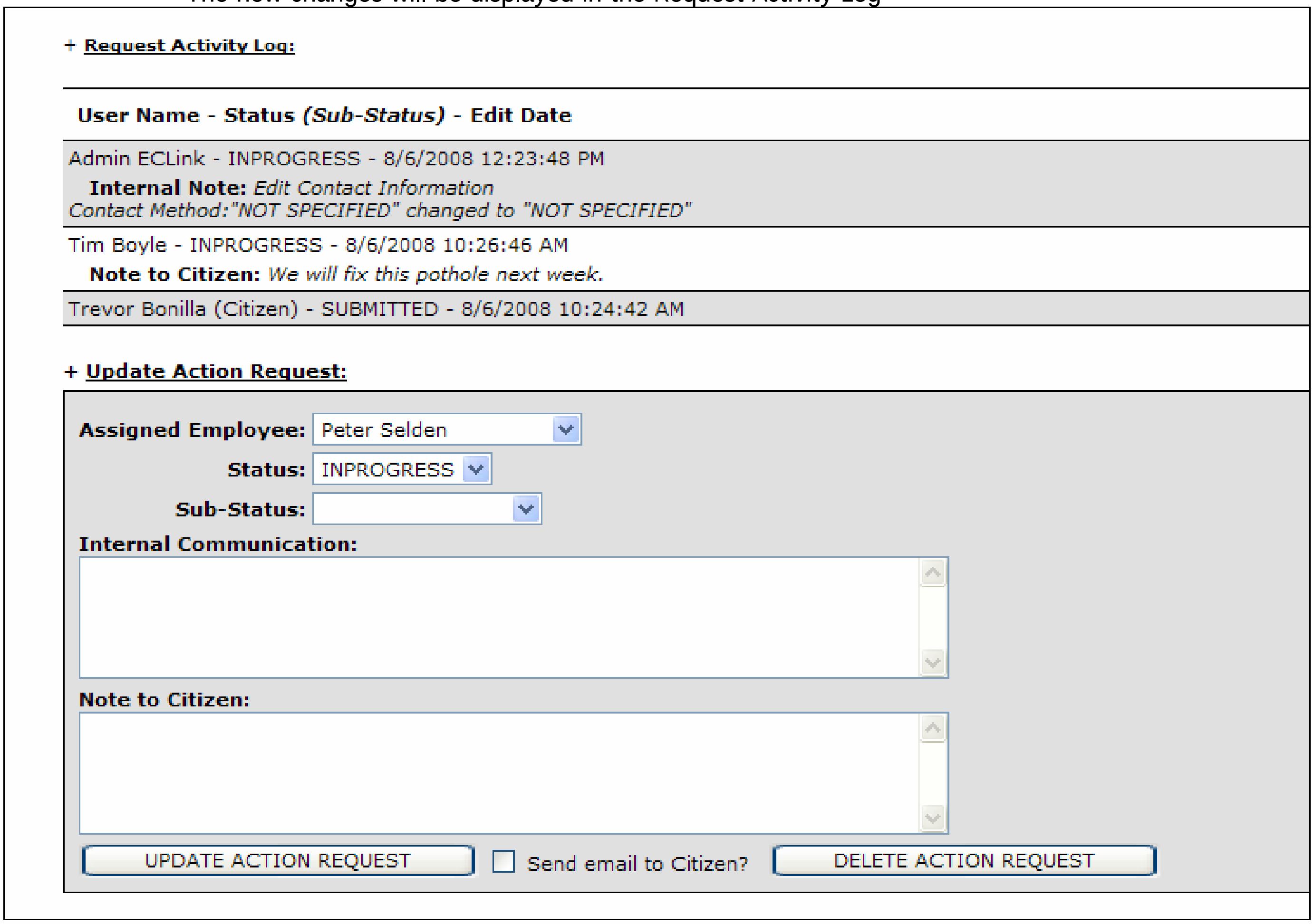


Figure 10: Request Activity Log / Update Action Request

Send Email Notification

- Allows you to notify other Admin users about the citizen concern (Figure: 11)
- Select the User to notify from the drop down menu or you can notify a depart or group of users by selecting a group under the notify department dropdown menu
- *note: the group must be set up as a “department” in the Security Menu (If the group is not an actual department, we suggest you start the name of the group with “zz” to distinguish it from a real department. This will also push the non-department groups to the bottom of the list where they can easily be found together.)
- Add additional comments if necessary and click send notification
- A record of the email the recipient along with the date and time will be stored within the Request Activity Log

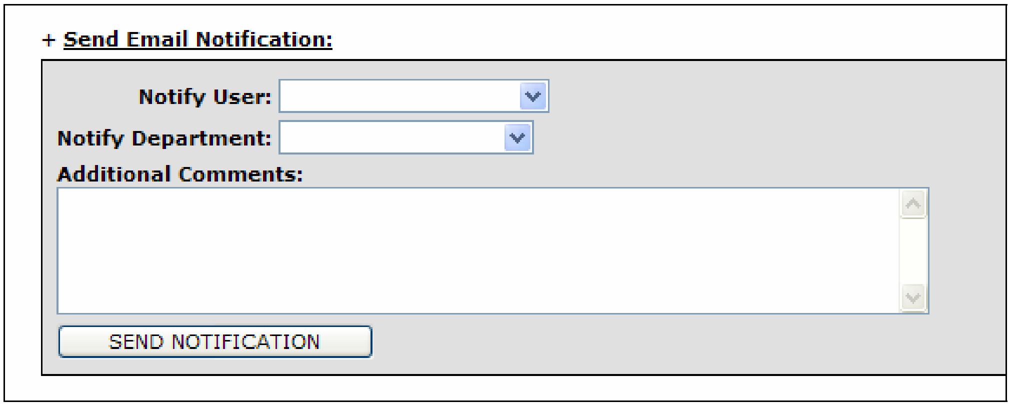


Figure 11: Send Email Notification

Work Order

- You can select a specific action line request item and print a work order that gives the details of the request and location.
- Navigation>Action Line>Requests
- Select a specific request
- At the top of the Request you will see Print Work Order and Print Condensed Work Order
- Print work order will open up a PDF document just like the action line item with all the details even those that were left blank
- Print condensed work order will open a PDF document with only the information that was entered into the request leaving empty fields out

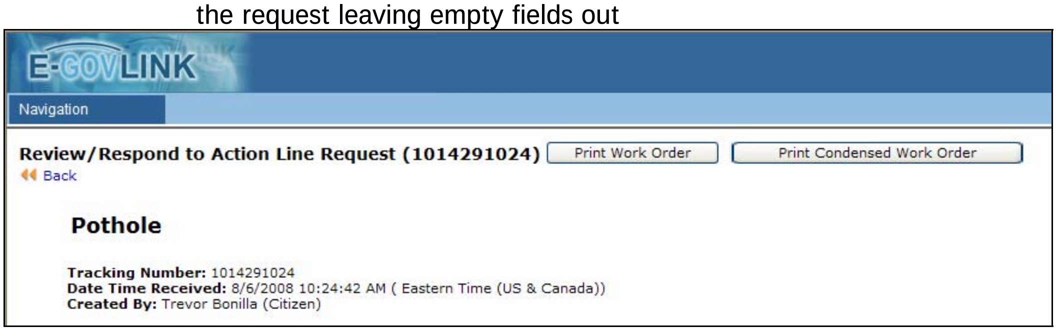
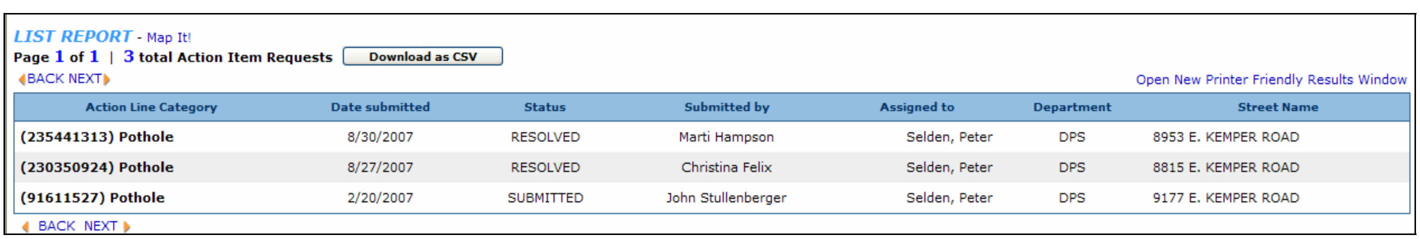


Figure 12: Print Work Order

E-Gov Request Query/Reporting Tool

- The action request list can be filtered by Assigned To (employee), Status, Category, Department, and specified date range.
- The action request list can be searched by submitted user's First and/or last name, street name, and/or ticket number.
- The report list can be ordered by Date Descending (Newest to Oldest), Category, Department, and Assigned To (employee).
- There are 4 Report Types
  - List Report (Figure 13)
  - List Full Report (Figure 14)
  - Summary Report (Figure 15)
  - Detail Report (Figure 16)


LIST REPORT - Map It!

Page 1 of 1 | 3 total Action Item Requests Download as CSV

BACK NEXT Open New Printer Friendly Results Window

Action Line Category	Date submitted	Status	Submitted by	Assigned to	Department	Street Name
(235441313) Pothole	8/30/2007	RESOLVED	Marti Hampson	Selden, Peter	DPS	8953 E. KEMPER ROAD
(230350924) Pothole	8/27/2007	RESOLVED	Christina Felix	Selden, Peter	DPS	8815 E. KEMPER ROAD
(91611527) Pothole	2/20/2007	SUBMITTED	John Stullenberger	Selden, Peter	DPS	9177 E. KEMPER ROAD

BACK NEXT

Figure 13: List Report

LISTFULL REPORT - Map It!
Page 1 of 1 | **3 total Action Item Requests**
BACK NEXT

Open New Printer Friendly Results Window

235441313	**Submitted Date:** 8/30/2007	**Status:** RESOLVED	**Category:** Pothole
Submitted By: Marti Hampson	**Address:** 8953 E. KEMPER ROAD	**Phone:**	
Assigned To: Selden, Peter	**Department:** DPS	**Days Allowed:** 0 day(s)	**Days taken to Complete:** 0 day(s)

Size of pothole Medium (12-24 inches) **Special Circumstances** Is creating traffic hazard **Type of road surface** Blacktop **Area of road affected (near curb, right lane, center of road, etc.)**

Peter Selden - RESOLVED - 8/30/2007 11:30:00 PM
Internal Note: *Action Request Resolved.*

Tim Boyle - INPROGRESS - 8/30/2007 1:19:04 PM
Note to Citizen: *We will fix this week.*

- SUBMITTED -

230350924	**Submitted Date:** 8/27/2007	**Status:** RESOLVED	**Category:** Pothole
Submitted By: Christina Felix	**Address:** 8815 E. KEMPER ROAD	**Phone:**	
Assigned To: Selden, Peter	**Department:** DPS	**Days Allowed:** 0 day(s)	**Days taken to Complete:** 0 day(s)

Size of pothole Huge (over 5 feet) **Special Circumstances** Is creating traffic hazard, On major street **Type of road surface** Blacktop **Area of road affected (near curb, right lane, center of road, etc.)** The entire road, it goes all the way across

Peter Selden - RESOLVED - 8/27/2007 11:30:00 PM
Internal Note: *Action Request Resolved.*

Figure 14: List (Full) Report

SUMMARY REPORT

Open New Printer Friendly Results Window

Date	Submitted	Open Items	Avg. Time still Open	Avg. Time to Complete
8/30/2007	2	1	1.0	< 1.0
8/29/2007	4	1	2.0	< 1.0
8/28/2007	3	0	None Open	< 1.0
8/27/2007	4	1	4.0	< 1.0
8/24/2007	1	0	None Open	< 1.0
8/23/2007	5	0	None Open	< 1.0
8/22/2007	2	0	None Open	< 1.0
8/21/2007	1	0	None Open	< 1.0
8/20/2007	2	0	None Open	< 1.0
8/17/2007	1	0	None Open	3.0

Figure 15: Summary Report

DETAIL REPORT - Map It!
Page 1 of 25 | **611 total Action Item Requests**
BACK NEXT

Open New Printer Friendly Results Window

Action Line Category	Date submitted	Date Completed	Days open*/To complete	Status	Submitted by	Assigned to	Department	Street Name
Grand Total [611 Requests]	**Submitted: 611**	**Open: 79**	**Avg Time Still Open: 179.3**		**Avg Time To Complete: 2.9**			
(235441313) Pothole	8/30/2007	8/30/2007	0 days	RESOLVED	Marti Hampson	Selden, Peter	DPS	8953 E. KEMPER ROAD
(235381217) Pothole	8/30/2007	???	1 days	SUBMITTED	Bill Jones	Selden, Peter	DPS	11242 ACREWOOD DRIVE
Subtotal: 8/30/2007	**Submitted: 2**	**Open: 1**	**Avg Time Still Open: 1.0**		**Avg Time To Complete: 0.0**			
(234421729) Pothole	8/29/2007	???	2 days	SUBMITTED	Steve Yee	Selden, Peter	DPS	7701 PFEIFFER ROAD
(234071422) Pothole	8/29/2007	8/29/2007	0 days	RESOLVED	Matt Alston	Selden, Peter	DPS	13061 COOPERMEADOW LANE
(234021411) Pothole	8/29/2007	8/29/2007	0 days	RESOLVED	Tami Eberle-Harris	Selden, Peter	DPS	1051 HERITAGE LAKE DRIVE
(233491114) Pothole	8/29/2007	8/29/2007	0 days	RESOLVED	Kathy Ammons	Selden, Peter	DPS	8018 DEERSHADOW LANE
Subtotal: 8/29/2007	**Submitted: 1**	**Open: 1**	**Avg Time Still Open: 2.0**		**Avg Time To Complete: 0.0**			

Figure 16: Detail Report

Alerts Manager

- This screen gives a summary of the action line forms and who each is assigned to. (Figure 17)
- Individual forms can be edited.
- Highlight the form and click to select. (Figure 18)
- The forms can be assigned to a specific individual with 2 additional notifications of when a form is submitted. Additional reminders and escalations can also be set (no limit).

(E-Gov Alert Manager) - Manage Action Line Request Forms

ID	Action Line Form Name	Category	Department	Assigned To
255	Appliance Collection	Repairs and Requests for Service	DPS	jeffrey nelson
298	Brush	Nuisance/Code Violations	DPS	peter selden
252	Building Code Violations	Nuisance/Code Violations	Building	peter selden
295	Building Permits	Requests for Information	Building	peter selden
289	Burning Permit	Requests for Information	Fire	peter selden
501	Business License Inquiry	Requests for Information	Business License	peter selden
5240	City of Lowell *TEST FORM*		Information Services	miran fernandez
2679	Complaint Form		Code Enforcement	peter selden
1581	Contact E-Gov Link	Internal Only	Information Services	peter selden
292	Crime Stoppers	Citizen Comments and Concerns	Police	peter selden
256	Curb and Gutter	Repairs and Requests for Service	DPS	peter selden
257	Dead animal removal	Animal Control	DPS	peter selden
711	Dog Registration Annual Application	Licenses	Animal Control	peter selden
262	Downtown Items	Repairs and Requests for Service	DDA	peter selden
258	Dumpster Billing	Repairs and Requests for Service	DPS	peter selden
259	Dumpster Service	Repairs and Requests for Service	DPS	peter selden

Figure 17: E-Gov Alert Manager

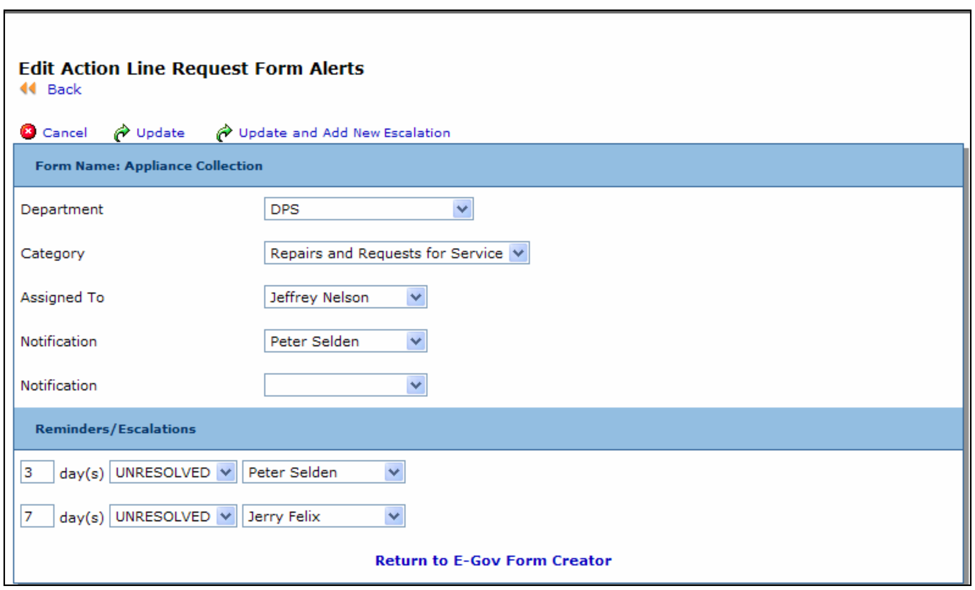


Figure 18: Manage Request Form

Notification Report

- This screen gives a detailed list of the action line forms and who each is assigned to including escalations.
- Individual forms can be edited.
- Highlight the form and click to select. (Figure 19)

Action Line Notification Report

ID	Action Line Form Name	Category	Department
7095	**311 Survey** Notify: Peter Selden Escalations: None set	Citizen Comments and Concerns	Information Services
7216	**Administration Complaint** Notify: Peter Selden Escalations: None set	Citizen Comments and Concerns	Manager
255	**Appliance Collection** Notify: David Boyer Escalations: David Boyer - UNRESOLVED 3 day(s) David Boyer - UNRESOLVED 7 day(s) Peter Selden - UNRESOLVED 14 day(s)	Repairs and Requests for Service	DPS
8958	**Boards & Commissions Application Form** Notify: Peter Selden Escalations: None set	Applications	Clerk
298	**Brush** Notify: David Boyer Escalations: Peter Selden - UNRESOLVED 3 day(s)	Nuisance/Code Violations	DPS
252	**Building Code Violations** Notify: Peter Selden Escalations: Peter Selden - SUBMITTED 2 day(s)	Nuisance/Code Violations	Building

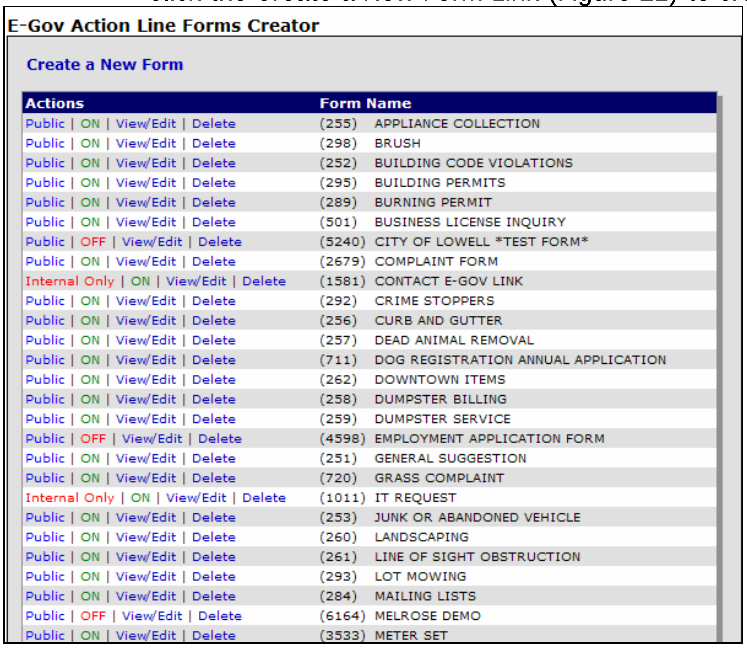
Figure 19: Action Line Notification Report

E-Gov Action Line Forms Creator

- Allows you to build a unique request form for each request type, so you always get the specific information you need to take action. No need to decipher phone messages or call back for more information.
- Forms can include check boxes, drop-down lists and other typical Web data entry formats.

Creating a New Action Line Form

- From Navigation go to Action Line>Forms Creator (Figure 20)
- Click the Create a New Form Link (Figure 21) to create a new Action Line Form.

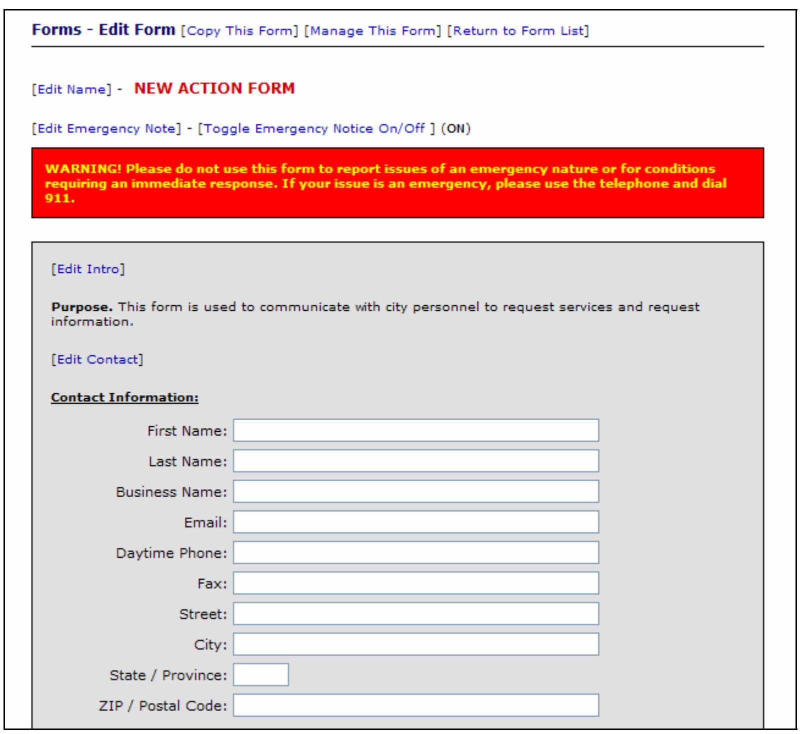


E-Gov Action Line Forms Creator

Create a New Form

Actions	Form Name
Public | ON | View/Edit | Delete	(255) APPLIANCE COLLECTION
Public | ON | View/Edit | Delete	(298) BRUSH
Public | ON | View/Edit | Delete	(252) BUILDING CODE VIOLATIONS
Public | ON | View/Edit | Delete	(295) BUILDING PERMITS
Public | ON | View/Edit | Delete	(289) BURNING PERMIT
Public | ON | View/Edit | Delete	(501) BUSINESS LICENSE INQUIRY
Public | OFF | View/Edit | Delete	(5240) CITY OF LOWELL *TEST FORM*
Public | ON | View/Edit | Delete	(2679) COMPLAINT FORM
Internal Only | ON | View/Edit | Delete	(1581) CONTACT E-GOV LINK
Public | ON | View/Edit | Delete	(292) CRIME STOPPERS
Public | ON | View/Edit | Delete	(256) CURB AND GUTTER
Public | ON | View/Edit | Delete	(257) DEAD ANIMAL REMOVAL
Public | ON | View/Edit | Delete	(711) DOG REGISTRATION ANNUAL APPLICATION
Public | ON | View/Edit | Delete	(262) DOWNTOWN ITEMS
Public | ON | View/Edit | Delete	(258) DUMPSTER BILLING
Public | ON | View/Edit | Delete	(259) DUMPSTER SERVICE
Public | OFF | View/Edit | Delete	(4598) EMPLOYMENT APPLICATION FORM
Public | ON | View/Edit | Delete	(251) GENERAL SUGGESTION
Public | ON | View/Edit | Delete	(720) GRASS COMPLAINT
Internal Only | ON | View/Edit | Delete	(1011) IT REQUEST
Public | ON | View/Edit | Delete	(253) JUNK OR ABANDONED VEHICLE
Public | ON | View/Edit | Delete	(260) LANDSCAPING
Public | ON | View/Edit | Delete	(261) LINE OF SIGHT OBSTRUCTION
Public | ON | View/Edit | Delete	(293) LOT MOWING
Public | ON | View/Edit | Delete	(284) MAILING LISTS
Public | OFF | View/Edit | Delete	(6164) MELROSE DEMO
Public | ON | View/Edit | Delete	(3533) METER SET

Figure 20: Forms Creator



Forms - Edit Form [Copy This Form] [Manage This Form] [Return to Form List]

[Edit Name] - NEW ACTION FORM

[Edit Emergency Note] - [Toggle Emergency Notice On/Off] (ON)

WARNING! Please do not use this form to report issues of an emergency nature or for conditions requiring an immediate response. If your issue is an emergency, please use the telephone and dial 911.

[Edit Intro]

Purpose. This form is used to communicate with city personnel to request services and request information.

[Edit Contact]

Contact Information:

First Name:
Last Name:
Business Name:
Email:
Daytime Phone:
Fax:
Street:
City:
State / Province:
ZIP / Postal Code:

Figure 21: New Action Line Form

E-Gov Action Line Forms Creator Terms

- **Copy this Form** – This link will create a new form with all the same parameters as the currently displayed form
- **Manage this Form** – This link will take you to the E-Gov Alert Manager
- **Return to Form List** – This link displays a list of all the available forms
- **Edit Name** – Edit the name of the form

- **Edit Emergency Note** – Edit the text of the emergency not displayed at the top of the form if it is set to ON.
- **Toggle Emergency Notice On/Off** – Toggles display of the emergency notice.
- **Edit Intro** – Edit the introduction text for the form
- **Edit Contact** – Edit the contact information necessary for the request form. The fields can be marked as optional or required. Available contact fields consist of:
    - First Name
    - Last Name
    - Business Name
    - Email
    - Daytime
    - Fax
    - Street
    - City
    - State
    - Zip
    - Custom fields can be added using the Add New Question Link if additional fields are necessary and would be displayed below in the questions
- **Edit Name/Description –** Allows you to edit the text and description of the problem location if it is toggled ON
- **Toggle Issue Location ON/OFF –** Toggles display of the issue/problem location
- **Question Terms**
    - Edit – Edit question prompt, answer choices, and optional/required field.
    - Delete – Delete question from the action line form
    - Move Up – Move the question up one position in the current question list.
    - Move Down – Move the question down one position in the current question list.
    - Move to Top – Move the question to the top of the question list.
    - Move to Bottom – Move the question to the bottom of the question list.
- **Edit Footer** – Edit the action line form footer

Adding a new Question

- Click on the Add a new Question Link
- Select the question type from the dropdown menu: (Figure 22)
    - Choose answer from list (Radio Box)
    - Choose answer from drop-down list (Select Box)
    - Choose multiple answers from list (Check Box)
    - Open answer one line response (Text Box)
    - Open answer Essay (Text Area)
- Enter the question,
- When entering the answer choices for Radio boxes, select boxes, and check boxes make sure to put one answer per line
- Select where or not the question is required
- Click save and add another question to save the current question and to add another new question or
- Click save and return to form to save the current question and return to the action line form.

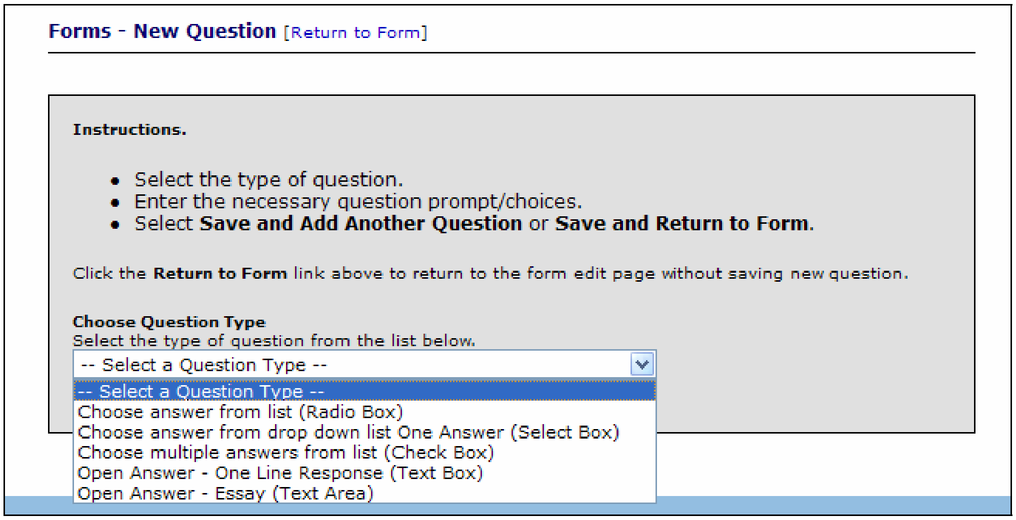


Figure 22: Add New Question

Editing a Question

- Scroll down to the question you would like to edit (Figure 23)
- Click the edit link above the question (Figure 24)
- Change the question prompt, the answer choices or whether it is required
- Click save changes

Figure 23: Question Example

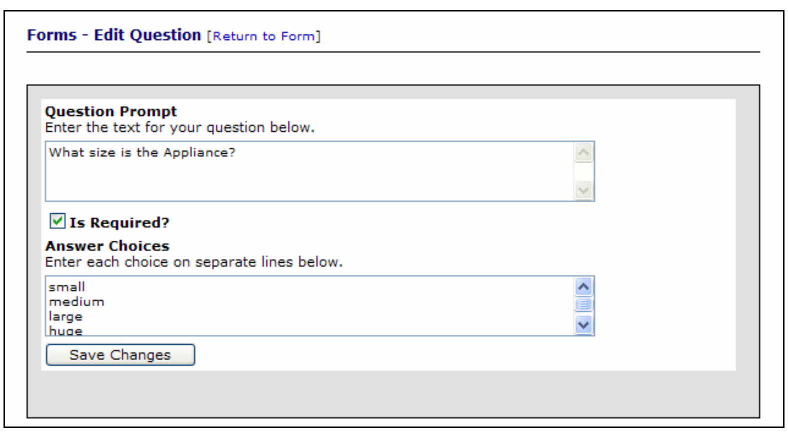


Figure 24: Editing a Question

Documents

- Using the Navigation menu select Online Documents>Documents/Folders

Document Search

- When first accessing the Documents section of the site (or after clicking the Documents Home icon), the user has the capability to search all existing documents on the site. The search will search the file names of all the files as well as the contents of common file types such as text files, Word documents, spreadsheets and PowerPoint presentations. In the Search Documents field, enter a word or words that you would like to search on and click the Go button. All documents you have access to that contain those words will be displayed.
- To view a particular document, click on the document name.

Viewing New Documents

- When first accessing the Documents section of the site (or after clicking the Documents Home icon), the user has the capability to view a list of the documents that were added within a specific amount of time.
- Select from the View new documents menu the time period that you would like to view.
  - Added today
  - Added in the last week
  - Added in the last two weeks
  - Added in last month

Displaying a Document

- The file structure is provided in typical Microsoft format on the left side of the screen.
- Click on a folder to display its contents (folder or file names) below
- When you have located a file that you want to display, click on the file name. Depending on your personal browser settings and how the document was added to the site, the document will either appear on the right side of the screen or will open in a new window.
- Right-click options
  - Right-clicking on a folder or document name provides the following list of options.
    - Folders: Edit Security, Add Folder, Add Document, Add Help, Delete Folder
    - Documents: Rename, Delete Document, Annotations

Adding a Folder

- Using the right-click menu select the Add Folder icon
- Enter a name for your folder
- Select the Create link

Folder Options

- Folders cannot be renamed, however anew folder with the desired name can be created.
- Once created the document from the original folder can be moved to the new folder and the old folder can be deleted

Adding a Document (must have permission to add documents to use this feature)

- Using the right-click menu select the Add Document icon
- Once a document has be uploaded it can be moved from one folder to another by dragging and dropping
- Select the method for getting your document to the server using the drop down menu

Using the Upload method

- Click the Browse button to explore your drives and locate the file that you would like to upload
- Click the Overwrite existing file checkbox if there is an existing file with the same name in the same location and you would like to replace that original
- Click the Create link

Using the Directly Add Content method

- Enter a title for your file
- Type in or copy and paste from another file the content.
- If the content contains HTML, select the Is Content HTML? checkbox.
- Click the Overwrite existing file checkbox if there is an existing file with the same name in the same location and you would like to replace that original
- Click the Create link

Using the Create Link Only method

- Enter a title for your file
- Enter the URL that accesses your file
- Check the Open in new window checkbox if you would like a new window to appear when the document is accessed.

  - Click the Overwrite existing file checkbox if there is an existing file with the same name in the same location if you would like to replace that original
  - Click the Create link

Deleting a Folder or Document (must have permission)

- Right click on the folder or document that you would like to delete
- Select the Delete option from the pop-up window

Published Documents Folders

- Published documents is where you place documents you want viewable by the public. The documents must first be placed in a folder. If there's no folder, the document will not appear.
- To navigate this screen you will need to **right click** on the published or unpublished documents folder. This will give you add a folder, document, etc.
- To create a folder, right click on "published document". After you've added your folder, right click on this folder to add the document to the folder. You can upload, directly add content or create a link only.

Unpublished Documents Folders

- Unpublished documents is a place to put documents which you wish to be accessible, but not searchable by the public. You can use this as a temporary storage area for documents which are not yet released, or drag seasonal documents from the published area during the seasons that they are not applicable

Editing Security of Folders (for administrators)

- To limit access to a particular folder,
- Right click on the folder and select the Edit Security option
- From the Directory List, select the Directory or Directories (groups) that you would like to have access to the folder. Use Ctrl+Click to select multiple Directories
- Click the blue arrow pointing to the Member Directories
- To deny access to specific directories, select them from the Member Directories list and click the blue arrow pointing to the Directory List.
- If no Directories are added to the Member Directories list, everyone will have access to the folder.
- All subfolders within a folder will have at least equal restrictions to their parent, but can have additional restrictions as well.

Online Payments

- Give your residents and local businesses a convenient way to use the Internet to make credit card payments for utilities, traffic tickets, etc.—any time of day or night.
  - Staff interruptions are reduced, with fewer walk-ins and calls.
  - E-Gov Payments enables the public to easily make payments online using PayPal payment gateway.
  - Users can register to simplify payment entry and view previous payments.
    - Forms will "auto-complete" basic information for registered users.
  - Tracks all payments received with time-stamped record
  - Print list of payments received for entry into accounting systems
  - E-Gov Link staff will work with you to setup what you are accepting payments for and what information you will need for each payment type

Manage Online Submitted Payments (E-Gov Payment Receipt Manager)

- Using the navigation menu select Payments>Payment Receipts (Figure 25)
- Highlight and click the payment you wish to manage. (You can search for the payment if necessary)
- You can change the assigned employee or status and add internal or public communication
- Then click update action request

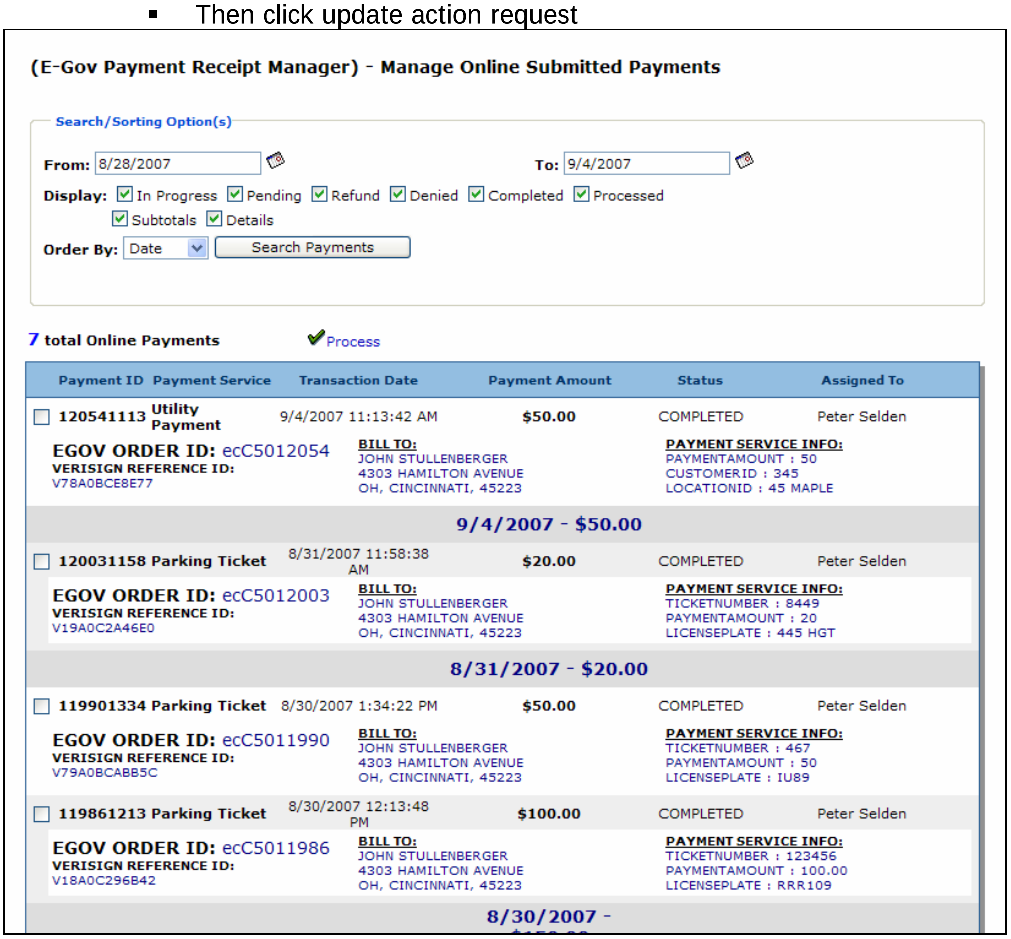
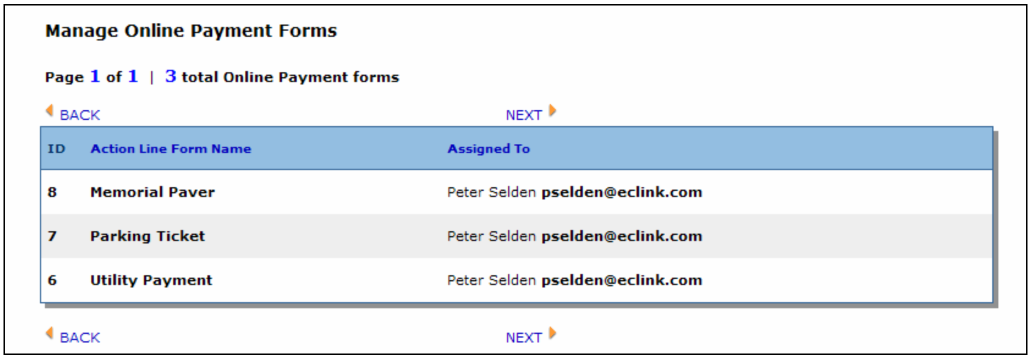


Figure 25: E-Gov Payment Receipt Manager

Manage Online Payment Forms (E-Gov Payment Notification Manager)

- Allows you to assign users to a payment form and assign a category for a payment form.
- Using the menu navigation select Payments> Payment Notifications
- Select the payment form you wish to edit (Figure 26)
- Change the person notified and click update to accept changes or cancel to return to the payment list without saving changes (Figure 27)



Manage Online Payment Forms

Page 1 of 1 | 3 total Online Payment forms

BACK NEXT

ID	Action Line Form Name	Assigned To
8	Memorial Paver	Peter Selden pselden@eclink.com
7	Parking Ticket	Peter Selden pselden@eclink.com
6	Utility Payment	Peter Selden pselden@eclink.com

BACK NEXT

Figure 26: E-Gov Payment Notification Manager

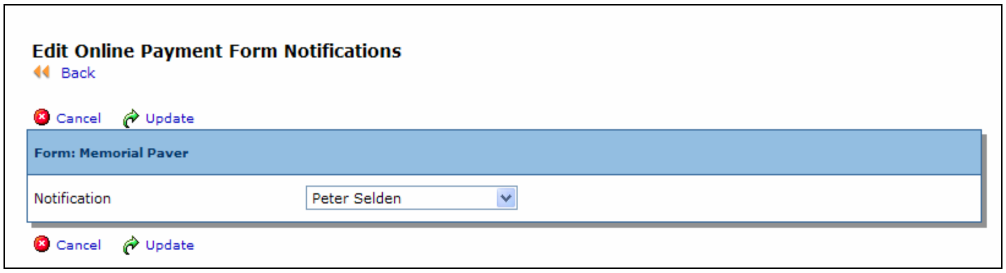


Figure 27: Manage Payment Form

E-Gov Basics Options

Subscriptions

- Public can sign up to get emails on specific areas they select
- You determine areas available to be selected
- You send emails to based on selected areas

Surveys

- Set up surveys as Action Line items
- Export survey results to Excel
- Use this tool to analyze data for other specific request types

Frequently Asked Questions Manager

- Easily create FAQ's using FAQ manager
- Users can select category or use keyword searches to find specific items of interest

Hidden Document Folders

- Create "invisible" document folders
- Authorized individuals can log in to view and access
- Use as an employee Intranet or for other groups that have access to documents different from the rest of the public.
- No limit to the number of different groups with access to their own documents.

Form Letter Option for Citizen Requests

- Send form letters (or emails) from the Citizen Request module back to requestors
- Includes form editor tool to create and update form letter templates
- Supports any number of different form letter templates
- Form letters can automatically merge contact information from original request by using variable field, like [*Last Name*]
- User can add other information to form letter
- Creates permanent record that letter was printed or email sent

Problem Location Tracking

- Public can enter problem location separate from their contact location
- Problem location can be selected from a list of valid addresses or entered manually
- You can sort or search on problem location (number within street)

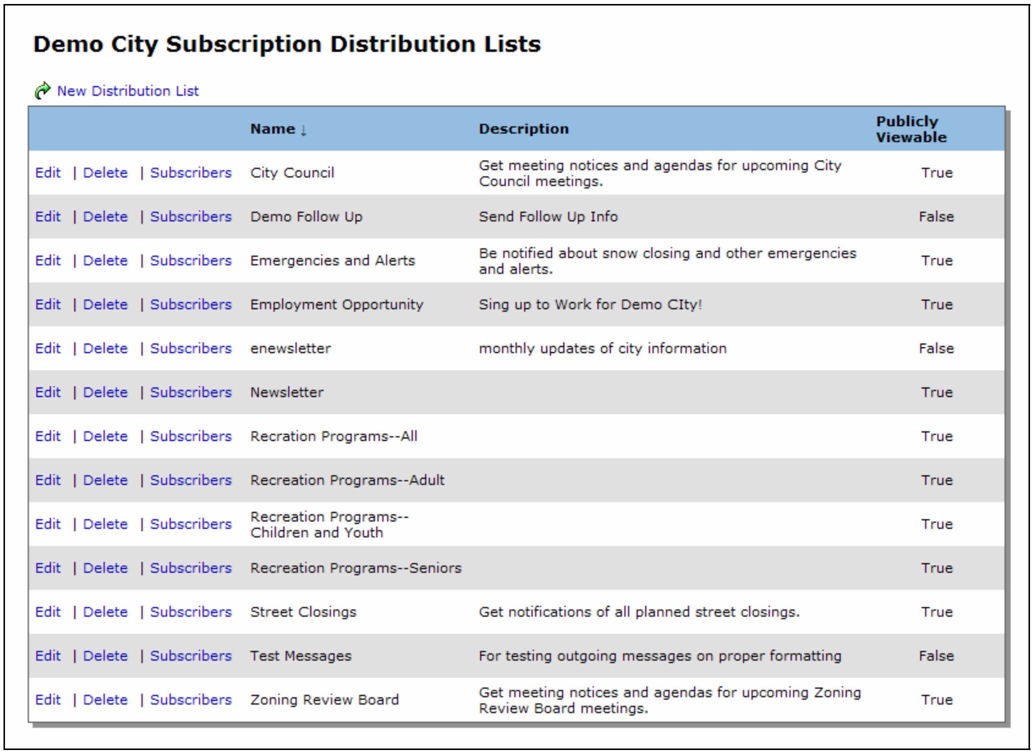
Problem Location Mapping (requires problem location tracking)

- Create map of problem locations
- Click on item to see location or click on location to see item

Subscriptions

Create Distribution Lists

- Using the navigation menu select Subscriptions> Create/Edit Distributions Lists (Figure 28)
- Click the New Distribution List Link to create a new distribution list
- Type a name for the distribution list (Figure 29)
- Type a brief description for the list
- Select the Check box if you would like to display this information on the registration form
- Click the Create Distribution List link

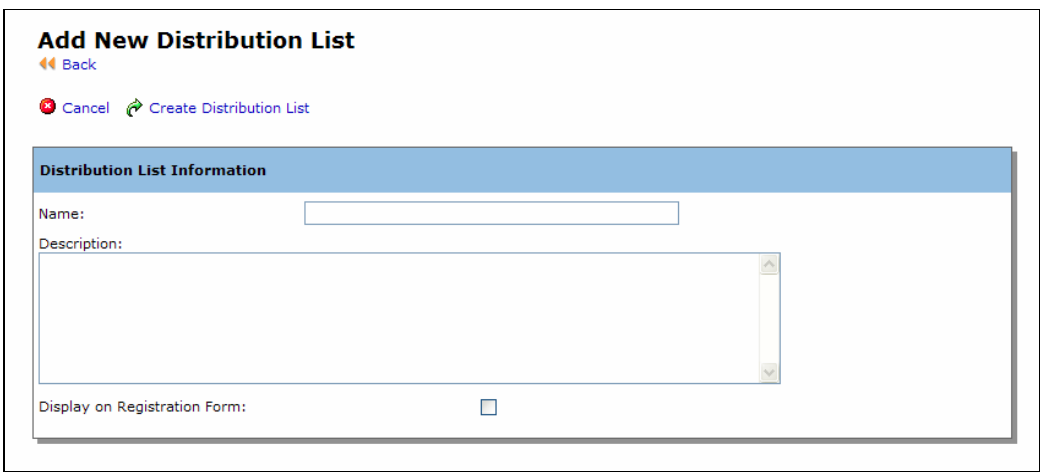


Demo City Subscription Distribution Lists

New Distribution List

	Name ↓	Description	Publicly Viewable
Edit | Delete | Subscribers	City Council	Get meeting notices and agendas for upcoming City Council meetings.	True
Edit | Delete | Subscribers	Demo Follow Up	Send Follow Up Info	False
Edit | Delete | Subscribers	Emergencies and Alerts	Be notified about snow closing and other emergencies and alerts.	True
Edit | Delete | Subscribers	Employment Opportunity	Sing up to Work for Demo CIty!	True
Edit | Delete | Subscribers	enewsletter	monthly updates of city information	False
Edit | Delete | Subscribers	Newsletter		True
Edit | Delete | Subscribers	Recration Programs--All		True
Edit | Delete | Subscribers	Recreation Programs--Adult		True
Edit | Delete | Subscribers	Recreation Programs--Children and Youth		True
Edit | Delete | Subscribers	Recreation Programs--Seniors		True
Edit | Delete | Subscribers	Street Closings	Get notifications of all planned street closings.	True
Edit | Delete | Subscribers	Test Messages	For testing outgoing messages on proper formatting	False
Edit | Delete | Subscribers	Zoning Review Board	Get meeting notices and agendas for upcoming Zoning Review Board meetings.	True

Figure 28: Create/Edit Distribution List



Add New Distribution List

Back

Cancel Create Distribution List

Distribution List Information

Name:

Description:

Display on Registration Form:

Figure 29: New Distribution List

Edit Distribution List

- Using the navigation menu select Subscriptions> Create/Edit Distributions Lists
- Click edit next to the distribution list you would like to edit
- Change the name, description, or whether it is displayed on the registration form
- Click cancel to return to the distribution list without saving or click save to keep your changes

Delete Distribution List

- Using the navigation menu select Subscriptions> Create/Edit Distributions Lists
- Click the delete link next to the distribution list you would like to delete
- Click OK to confirm or cancel to exit without deleting

Add subscribers to a Distribution List

- **Note**: You must Add Citizen Users first unless they self-subscribed from your website. Also if you need to edit an email address see the Citizen Registration Section below
- Using the navigation menu select Subscriptions> Create/Edit Distributions Lists
- Click the Edit link under Subscribers next to the distribution list for which you would like to add subscribers
- From the available column select the users to which you would like to be subscribed
- And click the arrow moving them over to the subscribed column; close the window when completed

Remove subscribers from a Distribution List

- Using the navigation menu select Subscriptions> Create/Edit Distributions Lists
- Click the Edit link under Subscribers next to the distribution list for which you would like to remove subscribers
- From the subscribed column select the users to remove from the distribution list
- Click the arrow to move them from the subscribed column to the available column

Send Emails to Subscribers

- Using the navigation menu select Subscriptions> Send Emails to Subscribers (Figure 30)
- Input the Email address and name from whom the email will be from
- Input the subject line and select the email format
- Type or copy and paste the body text for the email
- You can add a link to a document, action form, payment form, or URL
- Select the distribution list or lists to include in the email
- Click Send your message button

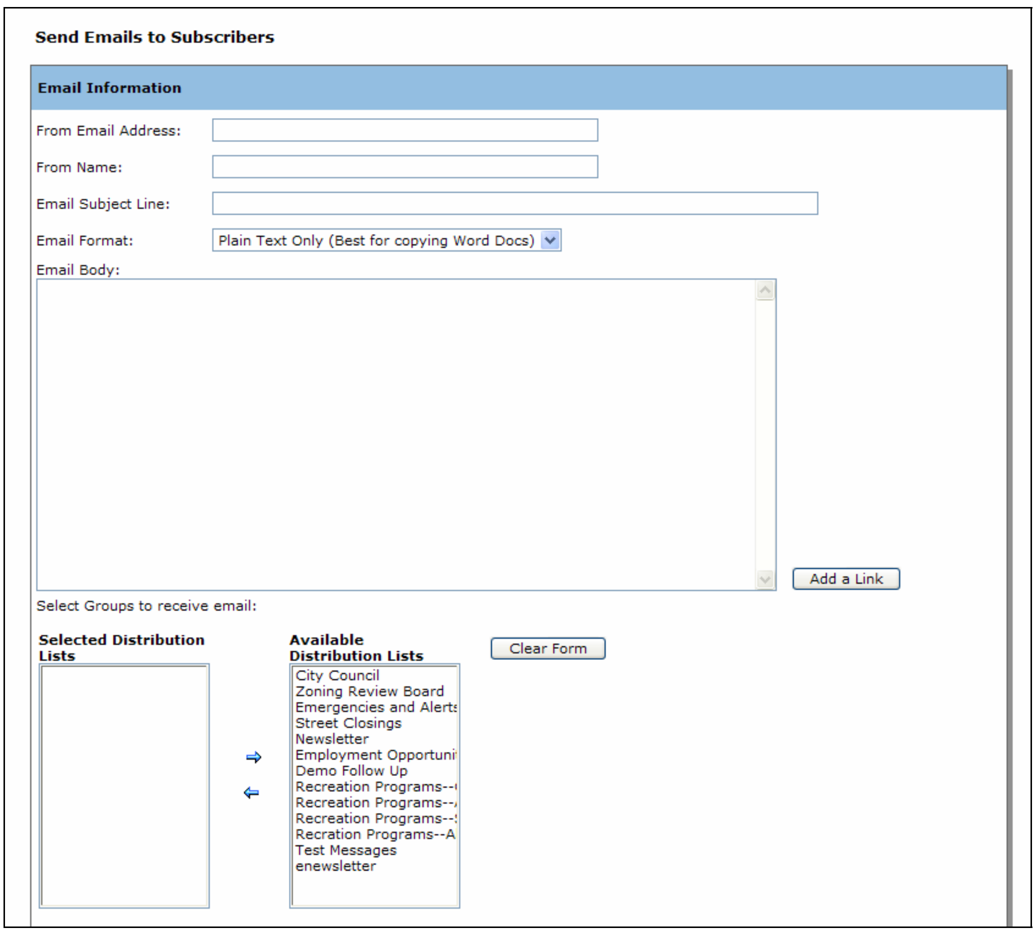


Figure 30: Send Email to Subscribers

Citizen Registration

Add Citizen Users

- Using the Navigation menu select Citizen Registration>Add Citizen Users
- Fill in the required/pertinent information
- Click the Create User Link

Edit Citizen Users

- Using the Navigation menu select Citizen Registration> Edit Citizen Users
- Find the user you wish to edit (if necessary you can search for the user) and click the User name (Figure 31)
- Make the necessary updates/changes
- Click update to save the changes or cancel to return to the citizen list without saving

Edit Citizen Groups

- Using the Navigation menu select Citizen Registration> Edit Citizen Users
- Find the user for which you would like to edit the groups for and click the Edit button under the Edit Groups heading
- A new window opens and there are two columns Already In Groups and Available Groups
- To add the user to certain groups move the group from available groups over to already in groups using the arrow pointing to the left
- To remove the user from certain groups under the already in groups select the group and click the arrow point to the right
- When finished close the window

Citizen Groups

- Using the navigation menu select Citizen Registration> Citizen Groups
- This is another way to edit the citizen user groups (Figure 32)
- Select the group you would like to edit. It shows the current user list

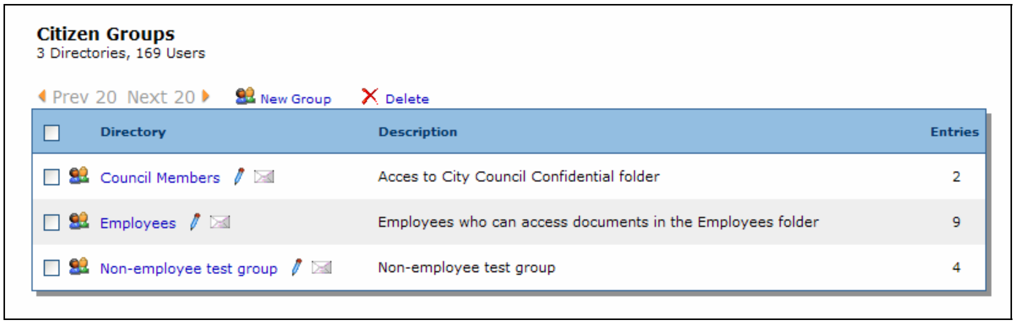
Edit the membership

- Follow the steps under citizen groups
- Click the edit membership link
- This is similar to above only you see users existing members and available members
- To remove a member from the existing member list select the user and click the arrow pointing to the right
- To add a member to the existing member list select the user in available members list and click the arrow pointing to the left
- When you are finished close the window.

Edit Citizen Users

- Follow the steps under citizen groups
- Find the user you wish to edit (if necessary you can search for the user) and click the User name
- Make the necessary updates/changes
- Click update to save the changes or cancel to return to the citizen list without saving
- You can also Edit the groups from here by clicking the edit button next to the user instead of clicking the user name

Figure 31: Edit Citizen Users



Citizen Groups
3 Directories, 169 Users

Prev 20 Next 20 | New Group | Delete

	Directory	Description	Entries
☐	Council Members	Acces to City Council Confidential folder	2
☐	Employees	Employees who can access documents in the Employees folder	9
☐	Non-employee test group	Non-employee test group	4

Figure 32: Citizen Groups

Surveys

- Set up surveys as Action Line Forms
- Export survey results to Excel
- Use this tool to analyze data for other specific request types
- See Creating Action Line Forms

FAQs

- Using the navigation menu select FAQ> Create Edit FAQ Items
- From this page you can create a new FAQ, view or edit a FAQ, delete a FAQ, and work with FAQ Categories (Figure 33)

Create a New FAQ

- Click the Create a New FAQ link
- Select a Category if applicable, enter the question, and the answer, add a link if necessary (See Adding a Link to more information under the Community Calendar)
- Click Add FAQ

View/Edit a FAQ

- Click View/Edit next to the FAQ you would like to view/edit
- Make the necessary changes
- Click Update FAQ or click Back to return to the FAQ List

Delete a FAQ

- Click Delete next to the FAQ you would like to delete
- Then select OK to delete the FAQ or click Cancel to exit without deleting

FAQ Categories

Add a new FAQ Category

- Click FAQ Categories link
- Type the name of the new category in the Text Box next to the add link (Figure 34)
- Click the Add link

Moving a Category Up or Down

- Use the up arrows next to the category you want to move up
- Use the down arrows next to the category you want to move down

Editing a Category

- Change the text of one of the categories shown and then click the save button

Deleting a Category

- Select the Delete link next to the category you wish to delete
- Click OK to delete or Cancel to exit without deleting

Demo City FAQs

Create a New FAQ FAQ Categories

Actions	Category	Seq	Question
View/Edit | Delete | Move Up | Move Down		(1)	How can I register?
View/Edit | Delete | Move Up | Move Down		(2)	What are the benefits of registering?
View/Edit | Delete | Move Up | Move Down	Community Events	(1)	How do I suggest something to add to the...
View/Edit | Delete | Move Up | Move Down	Community Events	(2)	What kind of events does the city have planned?
View/Edit | Delete | Move Up | Move Down	Action Line	(1)	How does the Action Line Request process work?
View/Edit | Delete | Move Up | Move Down	Action Line	(2)	Where can I get a variance application?
View/Edit | Delete | Move Up | Move Down	Online Payments	(1)	What kind of payments can I make online?

Figure 33: FAQ Items

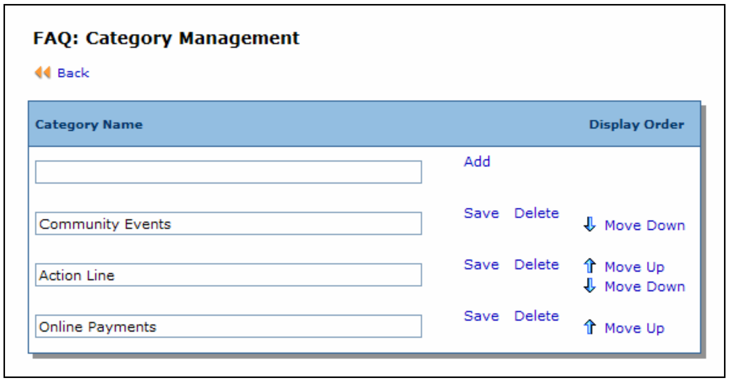


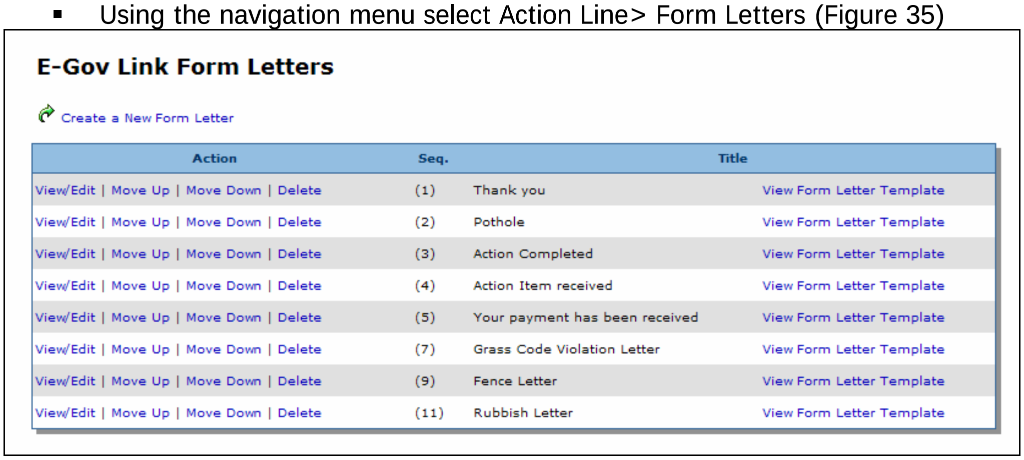
Figure 34: FAQ Categories

Hidden Document Folders

- Using the Navigation menu select Online Documents>Documents/Folders
- Navigate to the published folder that you would like to restrict from the public
- Right click on the folder you wish to restrict
- Select Edit Public Access
    - You will see Member Directories on the left and the Directory List on the right
    - If you don't move a directory from the directory list everyone will have access to the folder
    - Select the directory you wish to provide access to the documents
    - Click the arrow pointing to the left
    - Then Click the Refresh Menu button
    - This will update the folder list showing ® next to the folder you just restricted

Form Letters

- Using the navigation menu select Action Line> Form Letters (Figure 35)



E-Gov Link Form Letters

Create a New Form Letter

Action	Seq.	Title	
View/Edit | Move Up | Move Down | Delete	(1)	Thank you	View Form Letter Template
View/Edit | Move Up | Move Down | Delete	(2)	Pothole	View Form Letter Template
View/Edit | Move Up | Move Down | Delete	(3)	Action Completed	View Form Letter Template
View/Edit | Move Up | Move Down | Delete	(4)	Action Item received	View Form Letter Template
View/Edit | Move Up | Move Down | Delete	(5)	Your payment has been received	View Form Letter Template
View/Edit | Move Up | Move Down | Delete	(7)	Grass Code Violation Letter	View Form Letter Template
View/Edit | Move Up | Move Down | Delete	(9)	Fence Letter	View Form Letter Template
View/Edit | Move Up | Move Down | Delete	(11)	Rubbish Letter	View Form Letter Template

Figure 35: Form Letters

Create a New Form Letter

- Click the Create a New Form Letter Link
- Add a title for your Form Letter
- Add Body text to your form Letter
- Click Add Form Letter

View/Edit Form Letter

- Click the View/Edit link next to the form letter you would like to view/edit
- Make the necessary changes
- Click Update Form Letter

Manage Merge Fields

- These fields can be created when you create an Action Line form or they can be added to an existing Action Line Form
- Start by using the main navigation menu select Action Line>Form Creator
- When Editing an Existing form click the edit above the question you would like to add the merge fields name to (Figure 36)

- Enter a name that will allow you to differentiate it from other manage merge names and click save changes.
- When Creating a new Action Line Form you will need to add new questions once you are done adding the questions you then can go back and Edit the question to include the merge field name just like the steps above
- When viewing/editing a form letter click Manage Merge Fields
- This allows the form to be available to the selected Action Line Forms
- Click the check boxes next to the action line form or forms that you would like the form letter to be associated with
- Click Save and then Click Return to Edit Form Letter or Cancel to Return to the Form Letters List

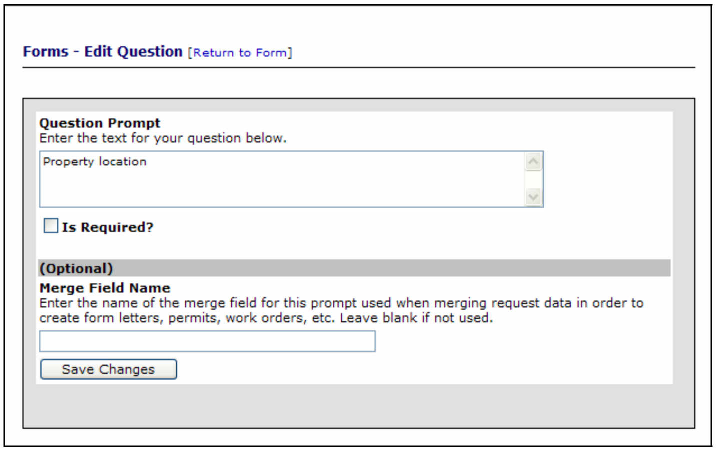


Figure 36: Merge Field Name

Move a Form Letter Up or Down

- Click Move Up next to the form letter you wish to move up one line
- Click Move Down next to the form letter you wish to move down one line

Delete a Form Letter

- Click the Delete Link next to the form letter you wish to delete
- Click OK to confirm or click Cancel to exit without deleting

View Form Letter Template

- Click View Form Letter Template to preview your form letter
- Click the X to close the window

Problem Location Tracking / Mapping

Valid Address List

- Using the Navigation Menu select Citizen Registration>Valid Address List (Figure 37)
- Follow the Instruction below for creating a new address, editing an address, or deleting an address

Create a New Address

- Click the New Link
- Enter the address information
- Click save to save and update the address list or click cancel to exit without saving.

Edit an Address

- Navigate to the address (search if necessary) and click the blue pencil next to the address you wish to edit
- Make the necessary changes
- And click save to update the information or click cancel to exit without saving

Deleting an Address

- Navigate or search for the address you would like to delete
- Select the Checkbox next to the desired address
- Click the delete link
- Select OK to continue to delete or cancel to exit without deleting

Resident Address Administration

Number of Addresses:3986, Number of Pages:200

(ex: "10522" OR "ACREWOOD")

Cancel Search

Prev 20 Next 20 New Delete

	Street Number	Street Name	City	State	Type	Latitude	Longitude
	11204	ACREWOOD DRIVE	Montgomery	OH	Residental	39.267377	-84.3199
	11205	ACREWOOD DRIVE	Montgomery	OH	Residental	39.267557	-84.320168
	11210	ACREWOOD DRIVE	Montgomery	OH	Residental	39.267453	-84.319824
	11211	ACREWOOD DRIVE	Montgomery	OH	Residental	39.267634	-84.320091
	11217	ACREWOOD DRIVE	Montgomery	OH	Residental	39.267711	-84.320014

Figure 37: Valid Address list

Mapping

- Using the navigation menu select Action Line>Requests
- Use the Search/Sorting Options to display the requests you would like to map (Figure 38)
- Click the Map It! button next to the Report this will display a Google map with a list of requests below with the address and problem
- Click the Close Google Map Window when finished

LIST REPORT Map It!

Page 1 of 35 | **858 total Action Item Requests** Download as CSV Download Activity Log

BACK NEXT

Open New Printer Friendly Results Window

Action Line Category	Date submitted	Status	Sub-Status	Submitted by	Contact Street Name	Assigned to	Department	Issue/Problem Location Street Name
(1017471051) Pothole	8/7/2008	INPROGRESS		David Evans		Selden, Peter	DPS	8965 CANYON RIDGE LANE
(1017251023) Pothole	8/7/2008	INPROGRESS		Steve Hicks		Selden, Peter	DPS	11641 CEDARVIEW DRIVE
(1017050917) Pothole	8/7/2008	INPROGRESS		Dennis Olson		Selden, Peter	DPS	11429 BRATTLE LANE
(1015721509) Pothole	8/6/2008	RESOLVED		Arch Liston		Selden, Peter	DPS	10684 BRAMBLEWOOD CIRCLE
(1014291024) Pothole	8/6/2008	RESOLVED		Trevor Bonilla		Selden, Peter	DPS	10469 CINDERELLA DRIVE
(1012641639) Appliance Collection	8/5/2008	SUBMITTED	Testing	David Boyer		Selden, Peter	DPS	12 That Road *
(1012261449) Pothole	8/5/2008	RESOLVED		Paul Marshall		Selden, Peter	DPS	11621 CEDARVIEW DRIVE

Figure 38: Map It!

Code Enforcement Options

Public or internal staff can report code violations online at any time.
Specific forms can be customized to be sure that all needed information is collected.
If email address provided, report submitter gets email confirmation and status update emails. They can also access activity and current status of complaint by using a tracking number.
Email alerts are automatically sent to appropriate internal staff for each new request. Email has a link to admin site to allow them to record follow-up activities, reassign responsibility, or change complaint status.
Internal-only fields allow staff to follow pre-defined path to problem resolution, which can be different for different request types.
Staff can send predefined form letters or form emails to property owners and others.
Staff can attach pictures, etc., to the complaint. Allows for paperless system.
All information stored in online database for searching and management reporting.

Form Letters

Send form letters (or emails) from the Citizen Request module back to requestors
Includes form editor tool to create and update form letter templates
Supports any number of different form letter templates
Form letters can automatically merge information from request
User can add other information to form letter

File Uploads

Admin can upload files attached to Action Line item
Clickable links are added to action line items to open attachments
No limit to number of attachments

Administrative Only Fields

Fields can be defined that would not appear on the public form
These would be filled in through Admin access
Fields can be used in form letters
Use for permits and other areas where admin section of form is needed

Sub-Status Reporting

Create specific sub-status types under each major status
Select items by sub-status as well as status

Code Sections

Create database of code sections contain section number and detailed text
Select sections by number for a specific violation
Create form letters containing code section numbers and detailed text

E-Gov Basics Code Enforcement Options

Form Letters

- Using the navigation menu select Action Line> Form Letters

Create a New Form Letter

- Click the Create a New Form Letter Link
- Add a title for your Form Letter
- Add Body text to your form Letter
- Click Add Form Letter

View/Edit Form Letter

- Click the View/Edit link next to the form letter you would like to view/edit
- Make the necessary changes
- Click Update Form Letter

Manage Merge Fields

- When viewing/editing a form letter click Manage Merge Fields
- This allows the form to be available to the selected Action Line Forms
- Click the check boxes next to the action line forms that you would like the form letter to be associated with
- Click Save and then Click Return to Edit Form Letter or Cancel to Return to the Form Letters List

Move a Form Letter Up or Down

- Click Move Up next to the form letter you wish to move up one line
- Click Move Down next to the form letter you wish to move down one line

Delete a Form Letter

- Click the Delete Link next to the form letter you wish to delete
- Click OK to confirm or click Cancel to exit without deleting

View Form Letter Template

- Click View Form Letter Template to preview your form letter
- Click the X to close the window

File Uploads

- Using the navigation menu select Action Line> Requests
- Select the Action Line Item that you would like to attach a file to
- Scroll Down to the Attachments section (Figure 39)
- Browse for the file and enter a description for the file you are uploading and select Save

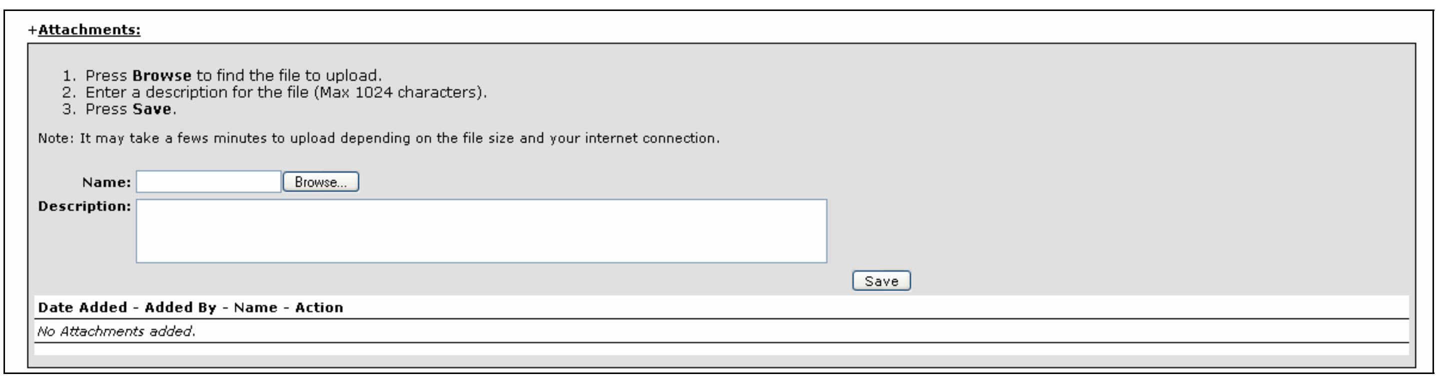


Figure 39: Attachments

Administrative Only Fields

Creating a Form with Administrative Only Fields

- Using the navigation menu select Action Line> Form Creator
- Click Create New Form
- Follow the instructions under the E-Gov Action Line Forms Creator section to learn how to add questions
- To add Admin Only Fields scroll to the bottom of the form and click Add New Internal Question
- Select the question type enter the appropriate information and select save and add another question to create another internal question or click save and return to form to save the question just created and to return to the form

Editing a Form to Include Administrative Only Fields

- Using the Navigation Menu select Action Line> Form Creator

- Click the form you would like to update
- Insert Internal Questions by scrolling to the bottom of the form and click Add New Internal Question
- Select the question type enter the appropriate information and click save and add another question to create another internal question or click save and return to form to save the question just created and to return to the form

Editing a Request's Administrative Only Fields

- Using the Navigation Menu select Action Line> Requests
- Click the request you would like to edit
- Scroll down to the Internal Only Use – Administrative Fields and click edit (Figure 40)

Figure 40: Administrative Fields

Sub-Status Reporting

Creating/Deleting a Sub-Status

- Using the Navigation Menu select Action Line> Action Line – Sub-Status (Figure 41)
- Enter the new text in the text box next to Sub-Status and select the Parent Status from the drop down menu Click create
- You can move the sub-status up and down by using the appropriate link next to each one
- To delete a sub-status click the Delete Link next to the appropriate sub-status

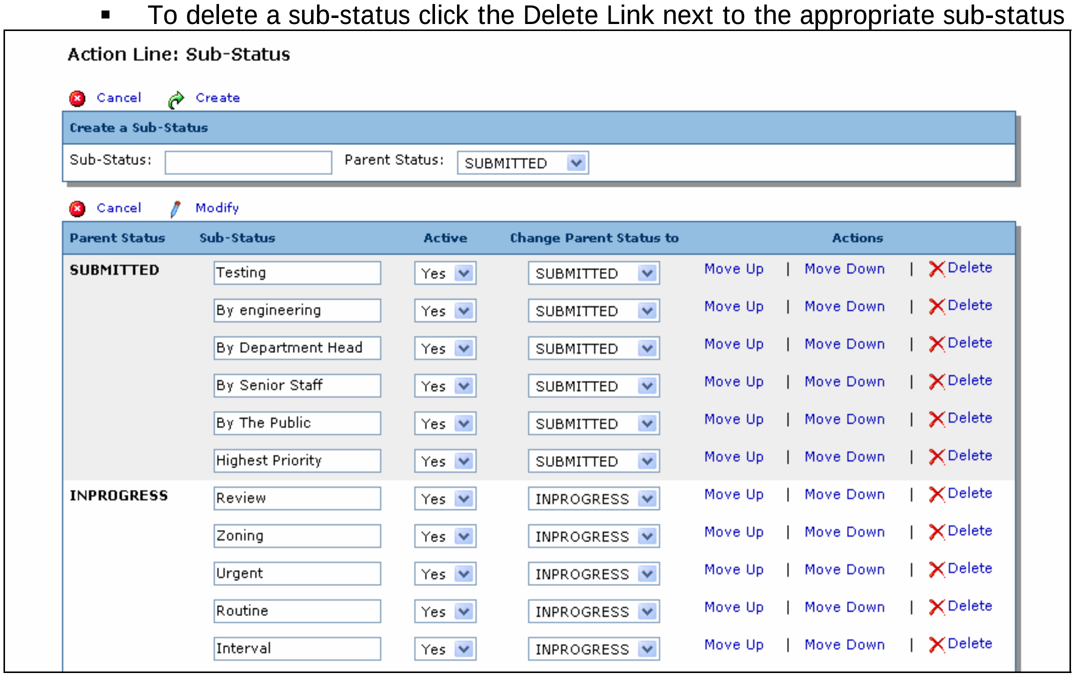


Figure 41: Action Line: Sub-Status

Applying Sub-Status to a submitted Action Line Item

- Using the Navigation Menu select Action Line> Requests
- Select the Action Line Item you would like to update
- Scroll down to Update Action Request (Figure 42)
- Enter the appropriate information, first select the parent status then the sub-status options will appear and you can select the sub-status from the drop down menu
- Click update action request

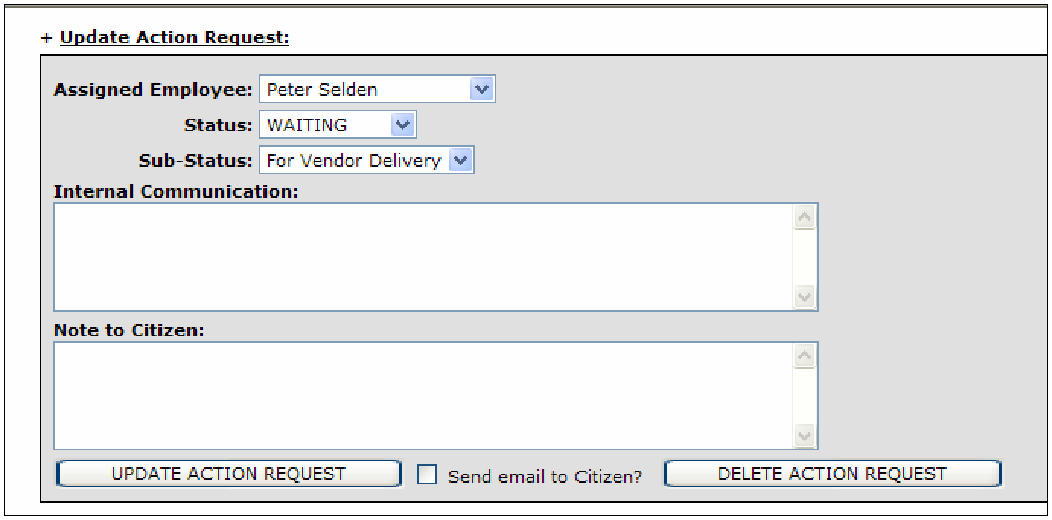


Figure 42: Update Sub-Status

Sorting Action Line Items by Sub-Status

- Using the Navigation Menu select Action Line> Requests
- Select the appropriate search criteria
- To bring up only those with a particular Sub-Status remove the checkboxes by status
- Click the Show/Hide Sub-Status List Check the appropriate boxes and click search

Code Sections

Creating/Editing/Deleting New Action Line Code Sections

- Using the Navigation Menu select Action Line> Action Line: Code Sections
- Type the text for the new code in the text box next to code (Figure 43)
- Enter a description and click create
- To Edit a code change the appropriate information and click modify
- To delete a code section click the delete link next to the appropriate code section

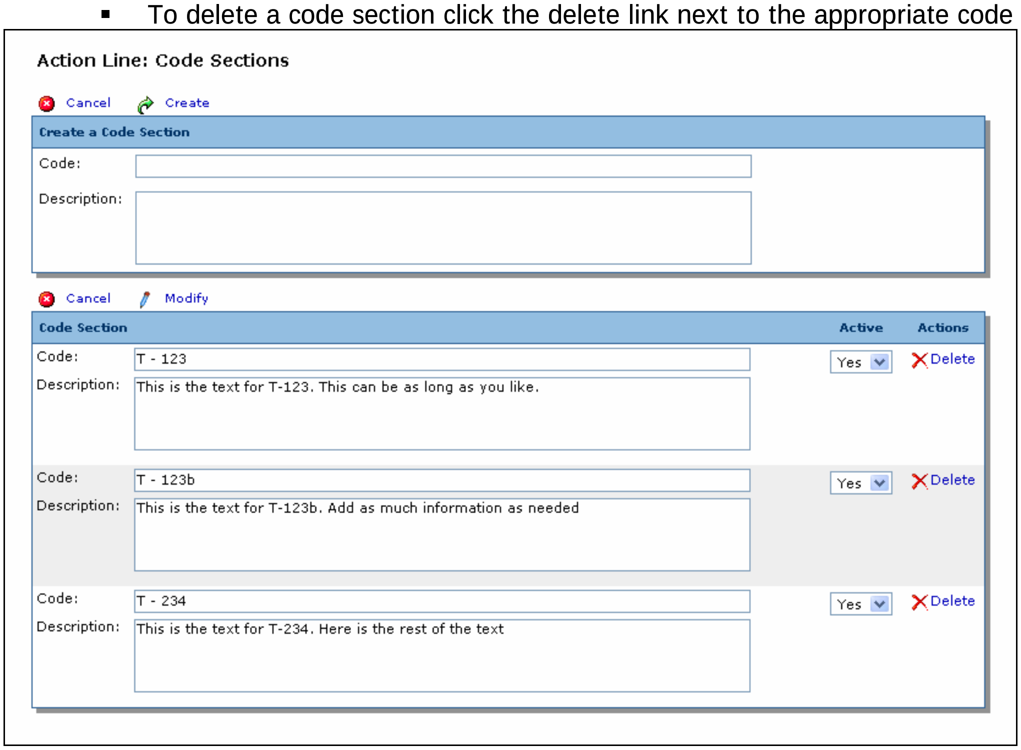


Figure 43: Action Line Code Sections

Applying Code Sections to a Submitted Action Line Item

- Using the Navigation Menu Selection Action Line> Requests
- Use the sorting options to select the action line item you would like to update
- Scroll down to Code Sections (Figure 44)
- Click the edit link check the box of the Code Section you would like to apply and click save

Using Code Sections with Form Letters

- Follow the instructions to create and edit form letters under the Options or Code Enforcement section
- When creating the Form Letter Make sure to include [*code_sections*] in the form letter.
- This will allow you to create a form letter to include the code and description in the letter to the citizen

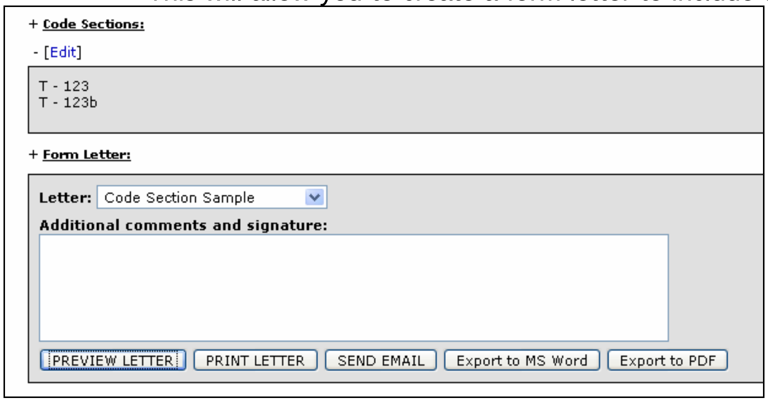


Figure 44: Code Sections

E-Gov Basics Add-On Options

Staff Directory

Creating Organizational Groups

- Using the Navigation Menu select Staff Directory>Create Organizational Groups
- Input the information to complete the entry
- Click Save
- To create sub-organizational groups make sure to select a parent group from the drop down menu when you create the next organizational group.

Adding (Removing) Staff Members to Organizational Groups

- Using the Navigation Menu select Security > Add Users (if you haven't done so already)
- Enter the information you would like to provide
- Make sure to select the organizational groups this person belongs (to select more than one hold the Ctrl key while clicking)
- Then select yes (no) from the drop down menu next to Display on Staff Directory
- Click Create

Or

- If you have previously created Users you can edit their information
- Using the Navigation Menu select Security > Edit Users
- Click the User Name you would like to edit (Figure 45)
- Make the necessary changes and click update
- To change other users click Back to User List

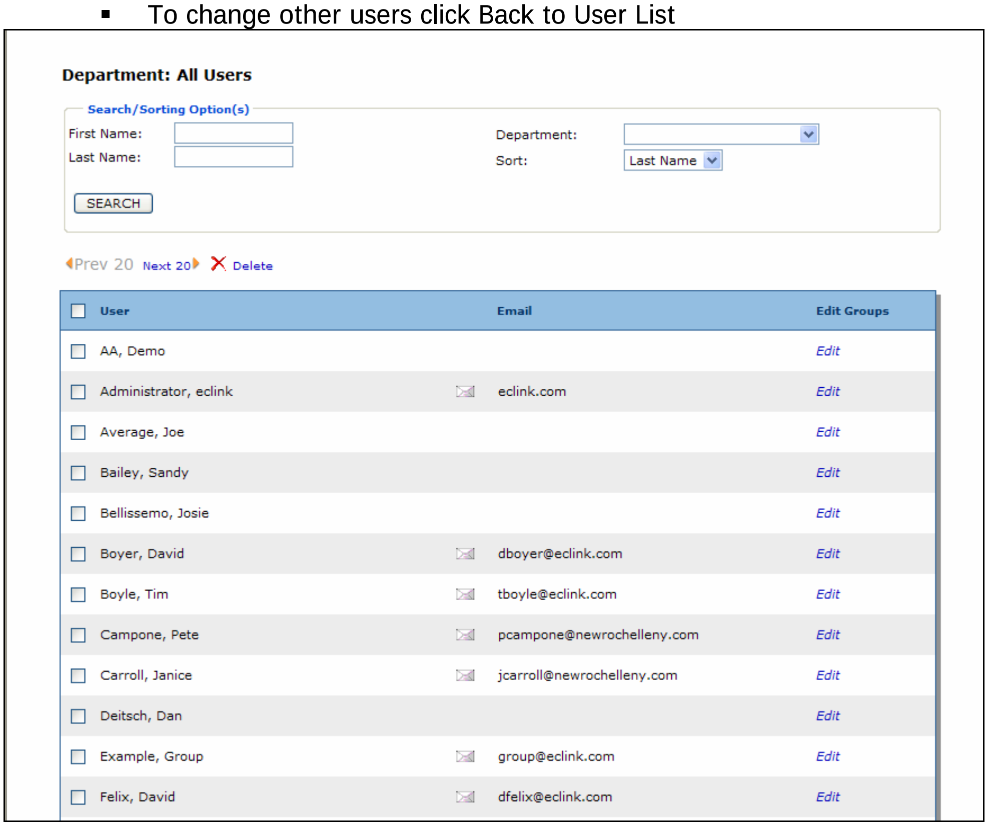


Figure 45: Edit Users

Job Postings

Creating Categories

- Using the Navigation Menu select Job Postings >Create Category
- Enter a name and description for the category (later you will classify the jobs into these categories) Figure 46
- Click Add

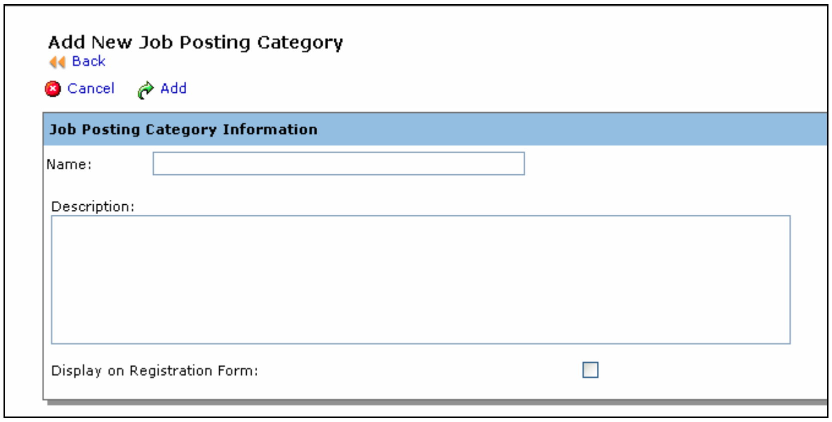


Figure 46: Job Categories

Editing/Deleting Categories
- Using the Navigation Menu select Job Postings > Edit Categories
- If you click the category name you can edit the name and description
- You can delete a category by clicking the delete link next to the appropriate category

Subscribers to Job Postings
- You can edit who is subscribed to this list by clicking edit next to the appropriate category
- Select the citizen you would like to add/remove and use the appropriate arrow
- If the citizen you are trying to subscribe isn't present you must first register the citizen see citizen registration under options (or the citizen must register themselves)
- When you are finished editing the subscribers close the window

Creating Job Postings
- Using the navigation Menu select Job Postings> Create Job Posting
- You can link a specific action line form to the job posting if you have one created
- Enter the information relevant to the job
- Select the categories the job should display under
- Click the add link to only add the job posting or click add and email to add the job posting and send an email to the subscribers

Editing/Deleting Job Postings
- Using the Navigation Menu select Job postings> Edit Job Postings
- Select the job you wish to edit make the necessary changes and click save or save and email
- To delete a job posting click the delete link next to the appropriate job postings

Send Emails to Job Posting Subscribers
- Using the Navigation Menu select Job Postings > Send Emails to Job Posting Subscribers (Figure 47)
- Input the Email address and name from whom the email will be from
- Input the subject line and select the email format
- Type or copy and paste the body text for the email
- Enter the body text for your email
- You can add a link to a document, action form, payment form, or URL (Figure 48)
  - Click the add link button, navigate to the document, action for etc that you would like to link to
  - Highlight and copy the appropriate link
  - Paste the link in your email
- Select the job posting category or categories to be included in the email
- Click Send your message button

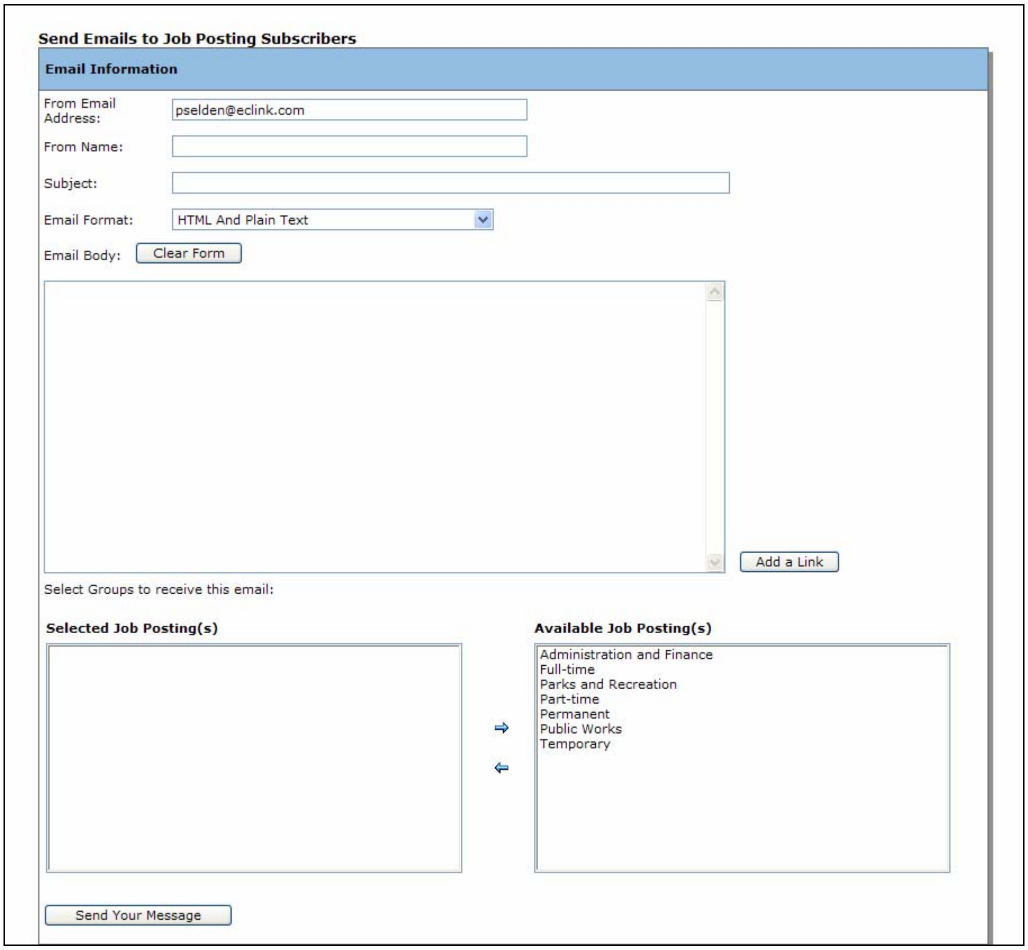


Figure 47: Send Emails to Job Posting Subscribers

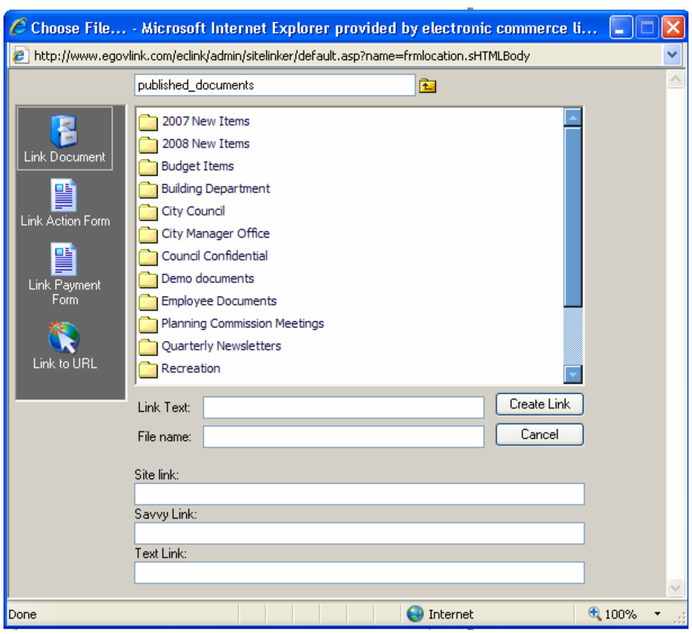


Figure 48: Add Link

Bid Postings

Creating Categories

- Using the Navigation Menu select Bid Postings >Create Category
- Enter a name and description for the category (later you will classify the bids into these categories) Figure 49
- Click Add

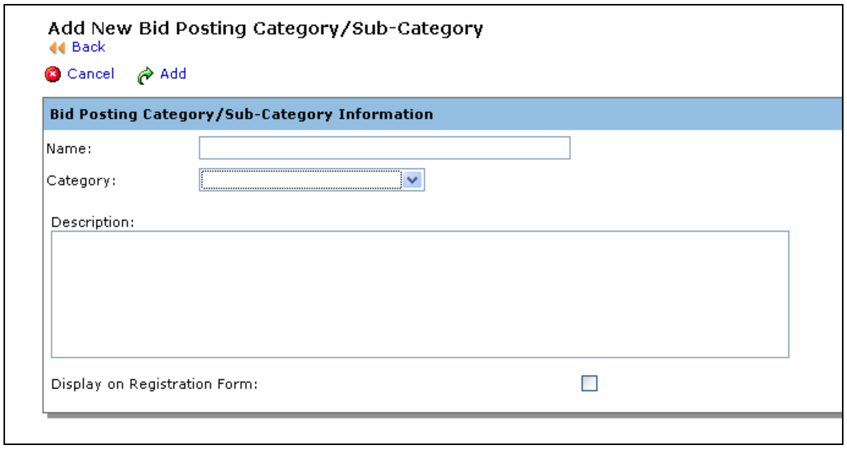


Figure 49: Bid Categories

Editing/Deleting Categories

- Using the Navigation Menu select Bid Postings > Edit Categories
- If you click the category name you can edit the name and description
- You can delete a category by clicking the delete link next to the appropriate category

Subscribers to Bid Postings

- You can edit who is subscribed to this list by clicking edit next to the appropriate category
- Select the citizen you would like to add/remove and use the appropriate arrow
- If the citizen you are trying to subscribe isn't present you must first register the citizen see citizen registration under options (or the citizen must register themselves)
- When you are finished editing the subscribers close the window

Creating Bid Postings

- Using the navigation Menu select Bid Postings> Create Bid Posting
- Enter the information relevant to the bid
- Select the categories the bid should display under
- Click the add link to only add the bid posting or click add and email to add the bid posting and send an email to the subscribers

Editing/Deleting Bid Postings

- Using the Navigation Menu select Bid postings> Edit Bid Postings
- Select the Bid you wish to edit make the necessary changes and click save or save and email
- To delete a bid posting click the delete link next to the appropriate bid posting

Send Emails to Bid Posting Subscribers

- Using the Navigation Menu select Bid Postings > Send Emails to Bid Posting Subscribers (Figure 50)
- Input the Email address and name from whom the email will be from
- Input the subject line and select the email format
- Type or copy and paste the body text for the email
- Enter the body text for your email
- You can add a link to a document, action form, payment form, or URL
    - Click the add link button, navigate to the document, action for etc that you would like to link to
    - Highlight and copy the appropriate link
    - Paste the link in your email
- Select the bid posting category or categories to be included in the email
- Click Send your message button

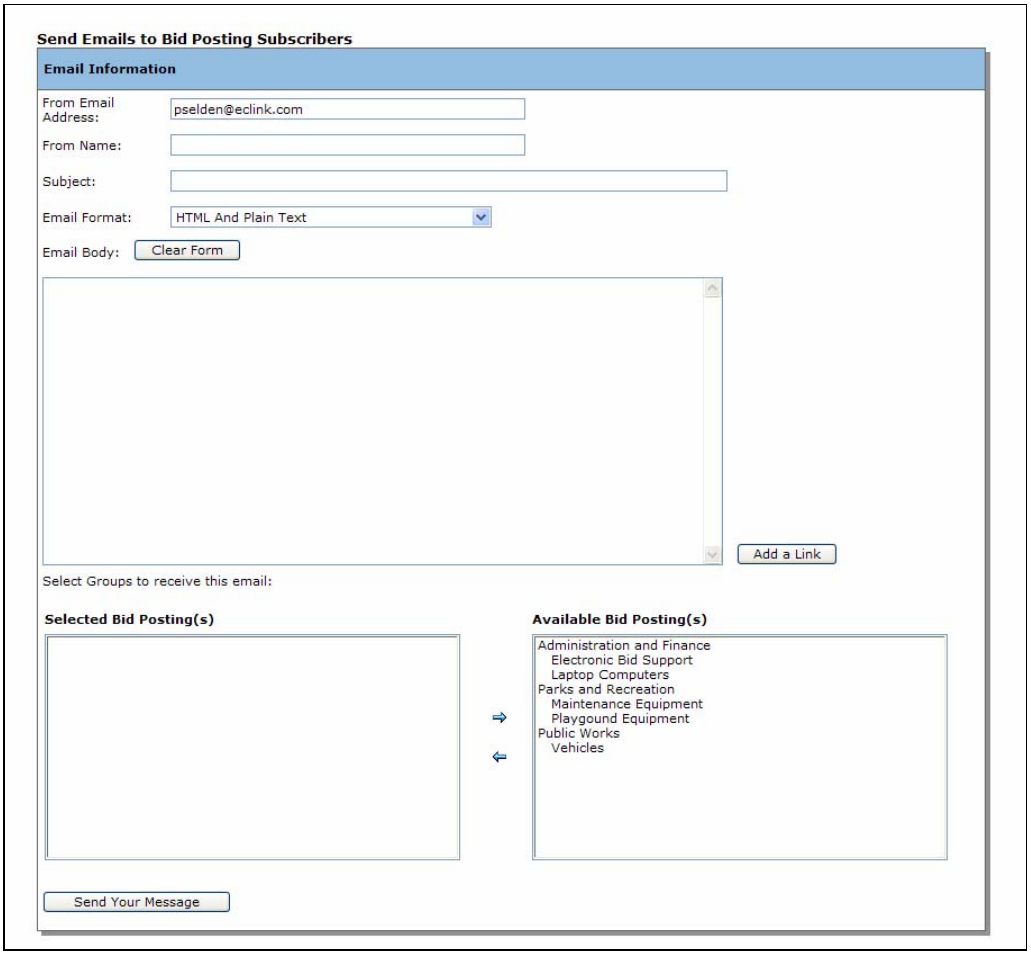


Figure 50: Send Emails to Bid Posting Subscribers