E-Gov Basics Online Reference Manual

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

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Table of Contents

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
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.

Setting up your E-Gov Site

- Create usernames and passwords for those who will be using the site.
- Give Permissions to users so they can access what they need.
- Create Departments for users
- Add users to departments
- Create Action Line Categories (this is how the forms will be categorized on the public site)
- Go through Action Line form creator to see which action line forms are needed. You may delete or change any forms to suit your needs.
- Manage your Action line forms by using the notification report. Make sure each form has a department, category, assigned to person, and any escalations needed.

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.

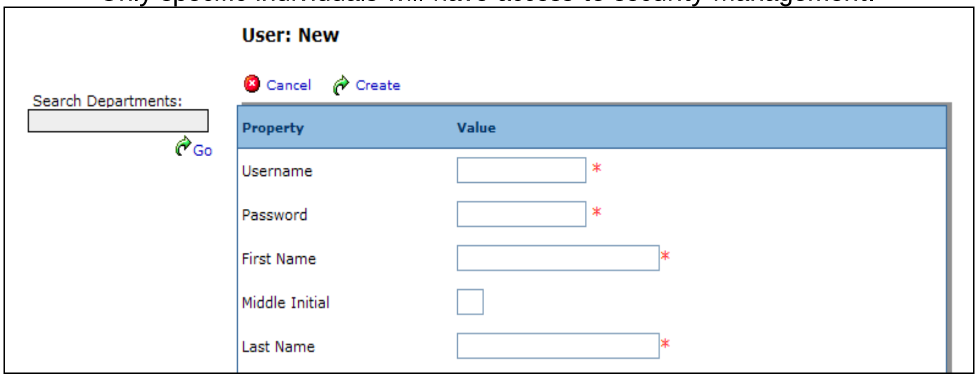


Figure: Adding Users

Add Users

- From the Navigation menu select Security>Add Users
- Input the desired/required information (Figure Adding Users)
- 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 Edit User List)
- Select the user (Figure Selected User)
- 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

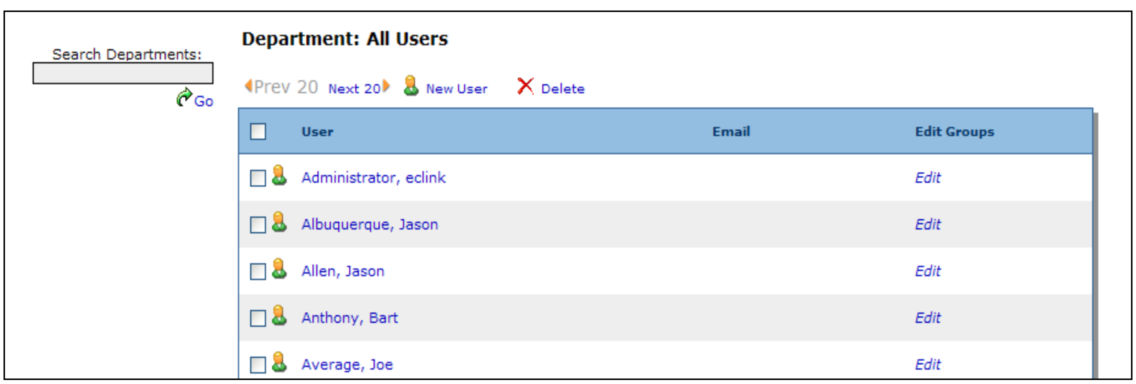


Figure: Edit User List

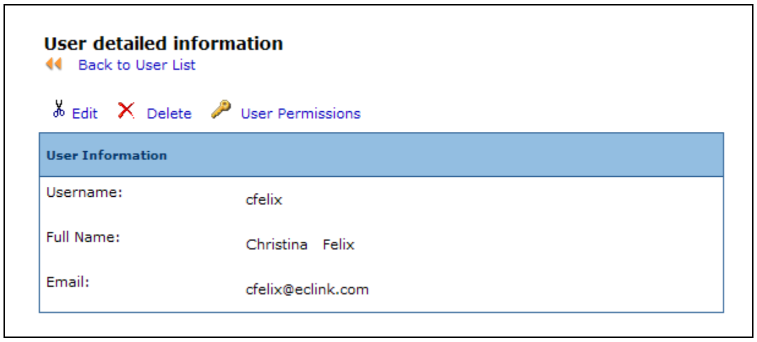


Figure: Selected User

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- Used in Action Line Security and reporting**.**

- Using the navigation menu select Security> Departments
- Add Departments by clicking the New Department button
- Put in Group Name and Description click create
- To add members to a group go to the department list click on the department you want to add members too
- Click edit member ship
- Select users using control click to select more than one user at a time then arrow them to the left

Delegates- Set a delegate when you are going to be out of the office to make sure your requests are handled. *Note* you will still receive all original emails, your delegate gets a copy letting them know the original person assigned to the request.

Selecting a Delegate

- Login to the E-Gov Link Admin Site
- Click "Your User Profile" under General Tools on the homepage
- The delegate dropdown is located on the top right hand side of your profile page (Figure: Select a Delegate)

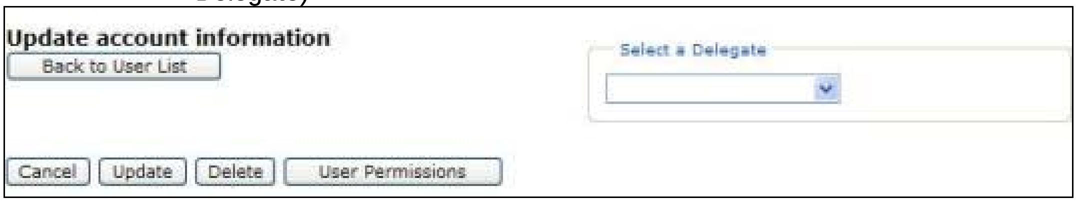


Figure: Select a Delegate

- Select your delegate or the personal responsible for handling your requests while you are out
- (An email is sent out to your delegate letting them know you have selected them, an email is also sent to you letting you know the change has been made)
- *Note* your Delegate selection will be displayed on the main admin Homepage. If no selection has been made the screen doesn't display the delegate selection. Figure Delegate Assigned

Figure: Delegate Assigned

Removing a Delegate Selection

- Login to the E-Gov Link Admin Site
- Click "Your User Profile" under General Tools on the homepage
- The delegate dropdown is located on the top right hand side of your profile page
- Select the Blank Spot to remove the previously selected Delegate

Overview

E-Gov Basics CRM Features Available

- **Citizen Request Management (CRM)**—Citizens can make suggestions, request information or request service at their convenience. Provides complete request management system for tracking and reporting. Required for all other CRM features.
- **CRM Problem Location Tracking**—We pre-load all valid addresses in your city, so citizens and staff can quickly determine if reported issue is in your jurisdiction. Search on streets or addresses to identify recurring issues. Use custom field to identify neighborhoods or districts.
- **CRM Request Mapping**—Create maps to see locations of selected requests. Requires Location Tracking.
- **CRM Survey Export**—Create citizen surveys using CRM forms and export to Excel for analysis.
- **CRM Merge Action Forms to PDF's**—Automate form submittal by merging data collected in CRM forms into PDF forms you create with Acrobat Professional.
- **CRM Form Letters**—Merge data collected in CRM forms with standard "boilerplate" text to create standardized emails or letters. Example: code enforcement non-compliance letters.
- **CRM File Uploads**—Add attachments to CRM requests to create a "paperless" system.
- **CRM Administrative Only Fields**—CRM requests can include fields not visible to public, so you can manage and track additional information about each request.
- **CRM Sub-Status Reportin**g—Create more specific sub-status types for each CRM status, so you can manage requests at a more detailed level.
- **CRM Code Sections**—Track and report violations by code section and incorporate into Form Letters.
- **CRM Reminder Scheduling**—Staff can set reminder emails to be automatically sent to selected individuals at selected times. Use for setting reminders for follow-ups.

E-Gov Basics Other Features Available

- **Calendar**—Community calendar allowing multiple categories, links to documents and websites, and key-word event search.
- **Multiple Calendars**—Allows unlimited different public and internal calendars. Requires Calendar.
- **Documents**—Centralized document repository in Microsoft folder style with content search feature.
- **Hidden Document Folders**—Set up folders that only appear for authorized users with login. Requires Documents.
- **Frequently Asked Questions (FAQ's)**—Create searchable FAQ knowledgebase. Include links to documents or web pages with added information. Citizen can "ask a question" with CRM request if answer not available. Staff can turn answer into a new FAQ for continuous enhancement.
- **Email Subscriptions**—Public can sign up online to receive emails on topics of interest to them. All emails sent can be saved for review and re-use.
- **Payments**—Public can pay online for various payment types the City will specify.
- **Staff Directory**—Display searchable, hierarchical staff directory so the public can identify and contact appropriate departments or staff members.
- **Job Postings**—Job-seekers can see and respond to job openings and sign-up to be automatically notified when new jobs are posted.
- **Bid Postings**—Suppliers can see bids by category and sub-category and sign-up to be automatically notified when new bids are posted.
- **Advanced Bids**—Requires suppliers to register in order to download detailed specifications, so staff can tell who accesses bid documents. Allows bids to be electronically uploaded. Requires Bid Postings.
- **News Scroller**—Create news items that can appear on your website (requires website coding).

E-Gov Basics CRM Features
Action Line - Citizen Request Management (CRM)

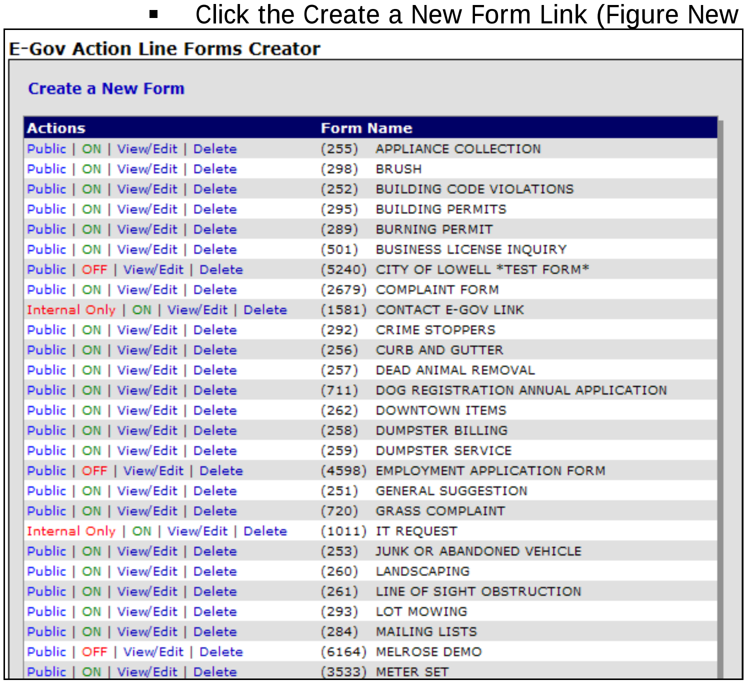
- Give your residents and local businesses an easy way to use the Internet to make suggestions, request information, and request action—any time of day or night
- Turn your PDF forms into forms that can be completed online. Use for service requests (reporting potholes), applications (permits, licenses,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

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

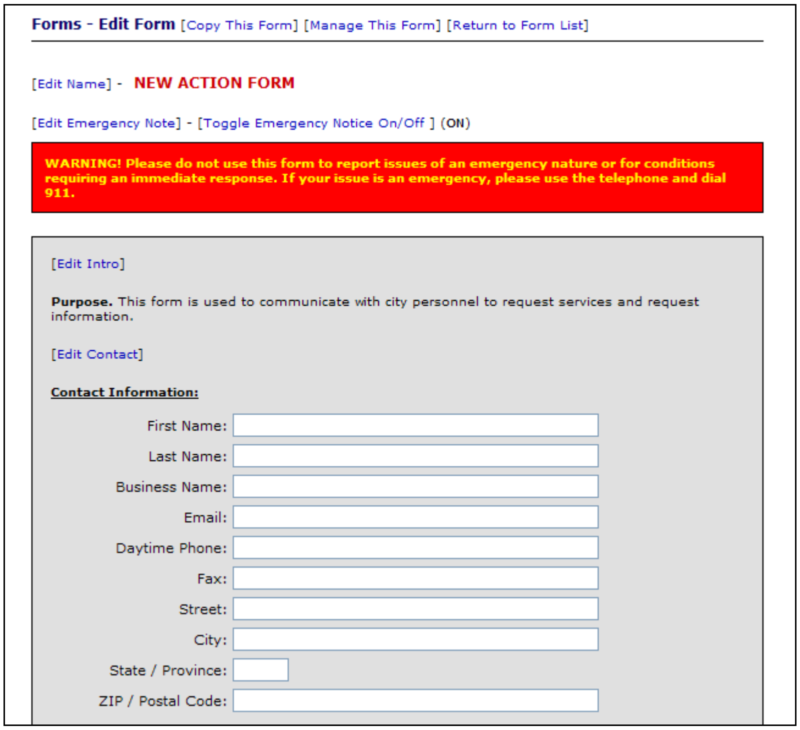
- From the Navigation menu go to Action Line>Forms Creator (Figure Forms Creator)
- Click the Create a New Form Link (Figure New Action Line Form) to create a new Action Line Form.


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: 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: 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, this tells what the form should be used for
- **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 Add New Question)
    - 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.

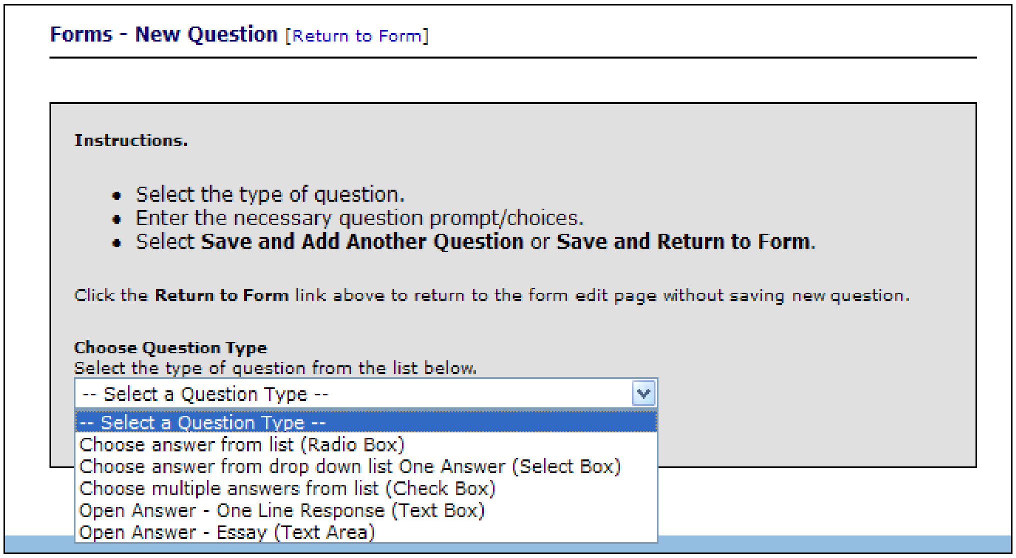


Figure: Add New Question

Editing a Question- User cannot edit the type of question

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

Figure: Question Example

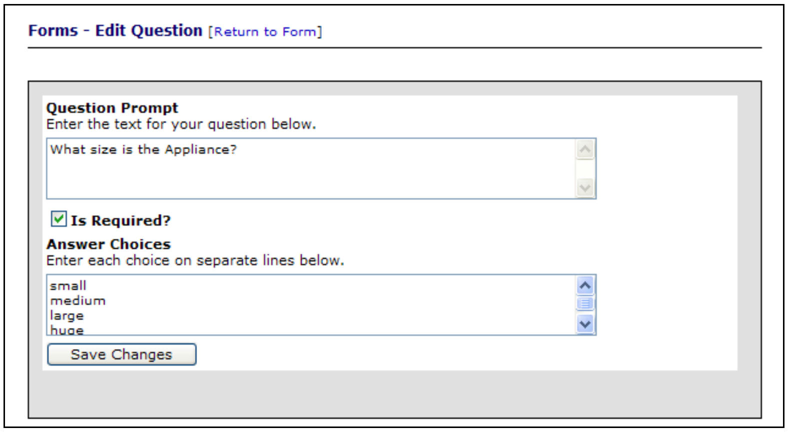


Figure: Editing a Question

Creating an Action Line Request (from the admin side to enter requests from citizens that call/walk in)

- From the navigation menu select Action Line>Create Action Line Requests
- Here you can submit action line requests for citizens that call, fax, mail, or walk in requests.
- This takes you to a 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.
- Submitting the request will give you a tracking number that you can give to the citizen to track later.

Manage Action Line Requests (E-Gov Request Manager)

- Figure Action Line Requests 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.

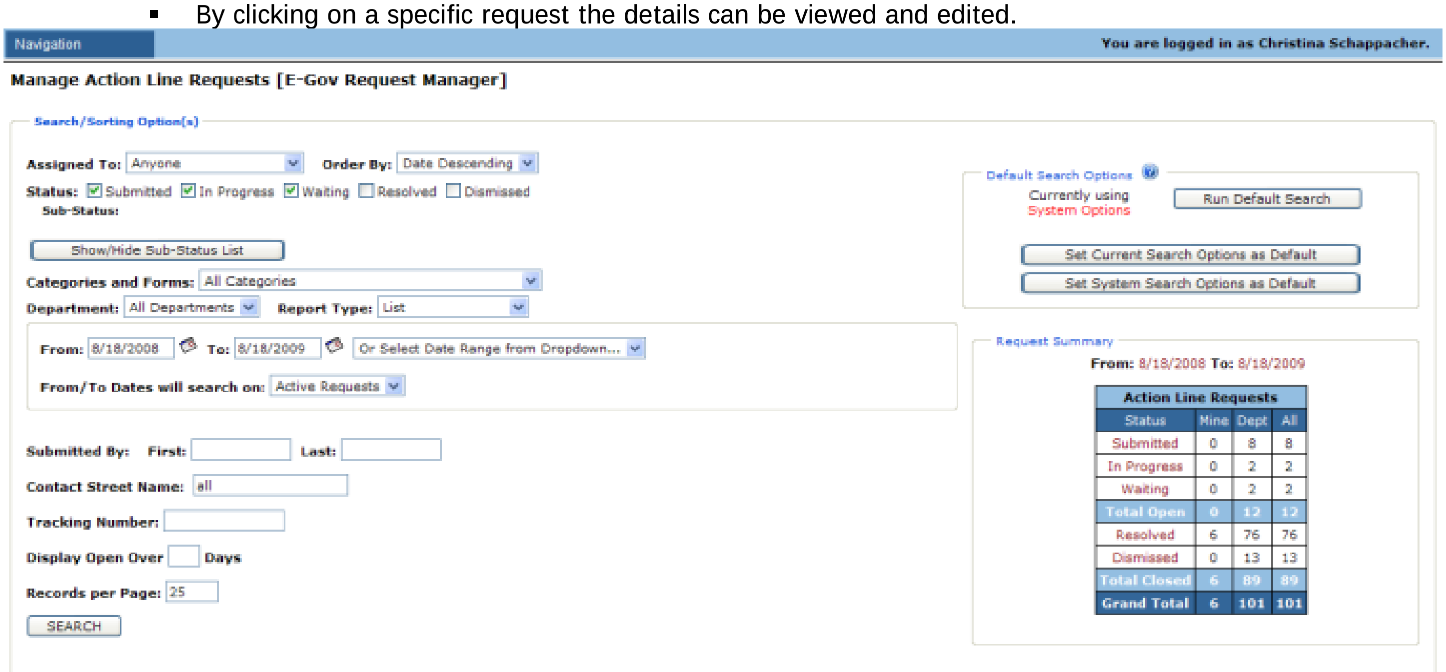


Figure: Action Line Requests

Editing an Action Line Request

- Using the Navigation menu Select Action Line>Requests
- This brings up a screen like Figure Action Line Requests.
- Search for the Action Line Request you would like to edit and then select it from the results
- This will bring up the individual request and all the details.
- Here you can edit contact information, location, form information, admin only fields (Option), attachments (option), Update action Request, Send Email Notification, Code Sections (Option), Sub-Status (Option), and Form Letters (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: Request Activity Log)
- The request activity log cannot be deleted

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 menu 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

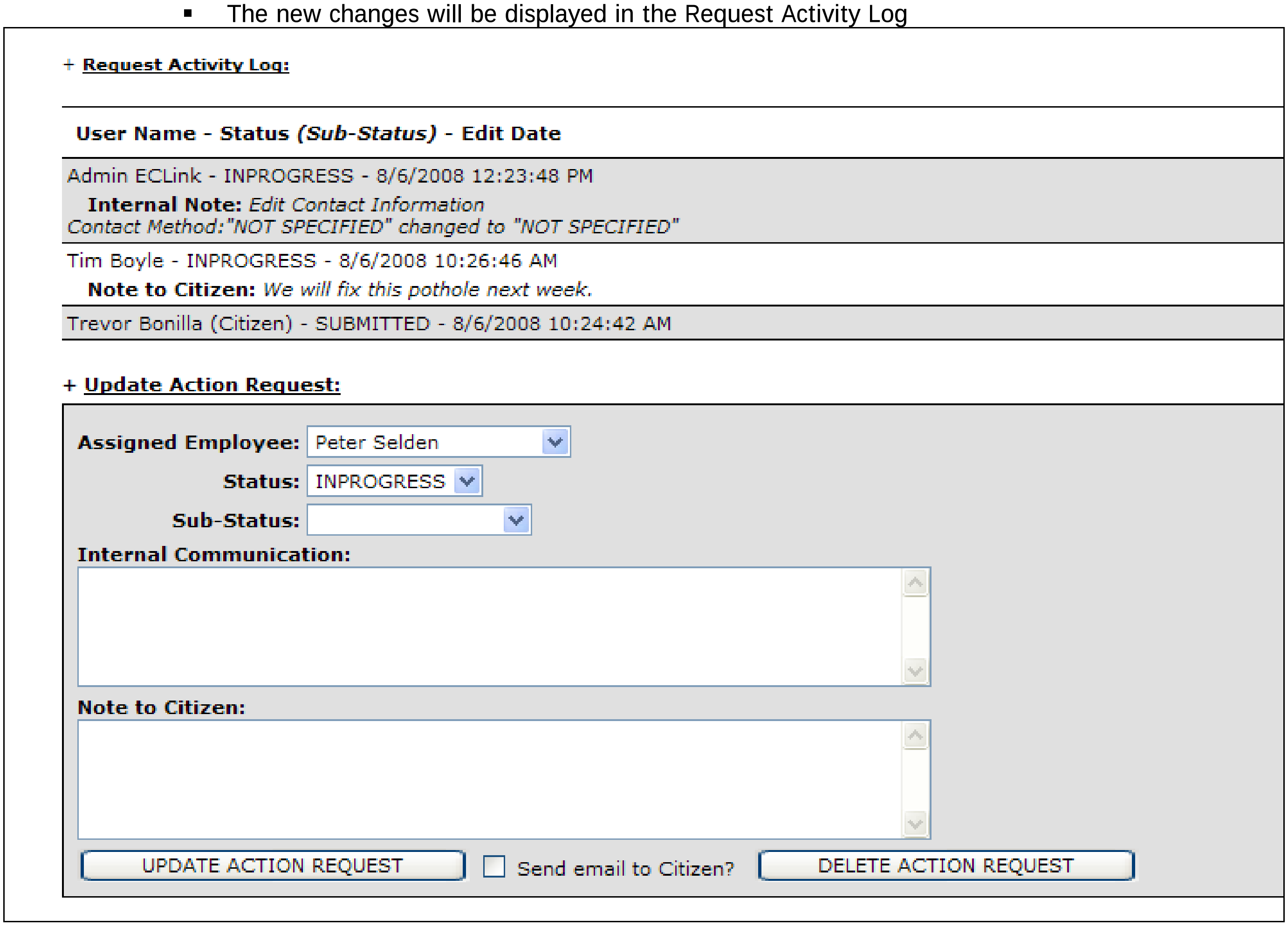


Figure: Request Activity Log / Update Action Request

Send Email Notification

- Allows you to notify other Admin users about the citizen concern (Figure: Send Email Notification)
- Select the User to notify from the drop down menu or you can notify an entire department or group of users by selecting a group under the notify department dropdown menu
- You do not have to select a department if you just want to notify a user and vice versa.
- *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

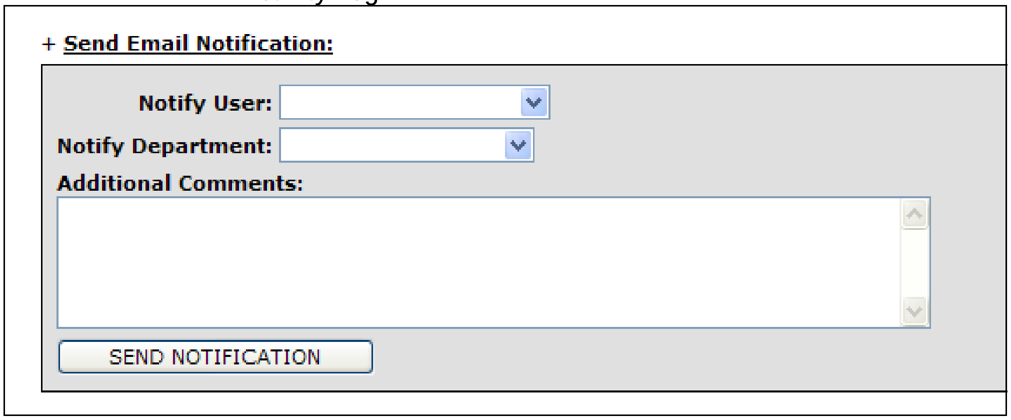


Figure: Send Email Notification

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 (Figure Print 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

Push Action Line Request to FAQ- requires organization to have action line and FAQs

- Open the request that you would like to turn into FAQ: Navigation>Action Line>Requests
- Answer the question and send to note to the citizen, this will put the question and answer in the FAQs page
- Make sure FAQs appears in the dropdown in the upper right corner of the requests page and select the push button. (Figure Push request to FAQs)

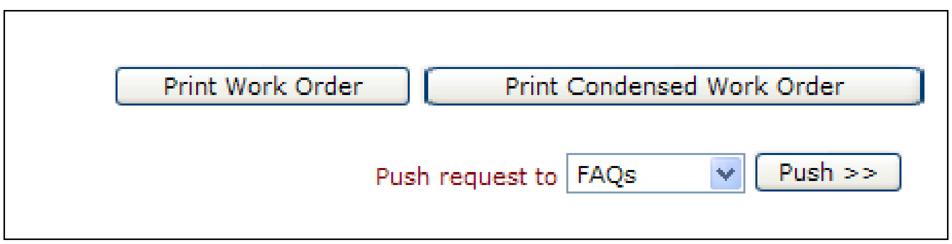


Figure: Print Work Order / Push request to FAQs

- Select a Category for FAQ if necessary (Figure: Pushed action line request to FAQs screen)
- Make changes to question and answer if needed
- Add publication start date (when to display to public). If desired you can add a publication end date
- Click ADD FAQ button

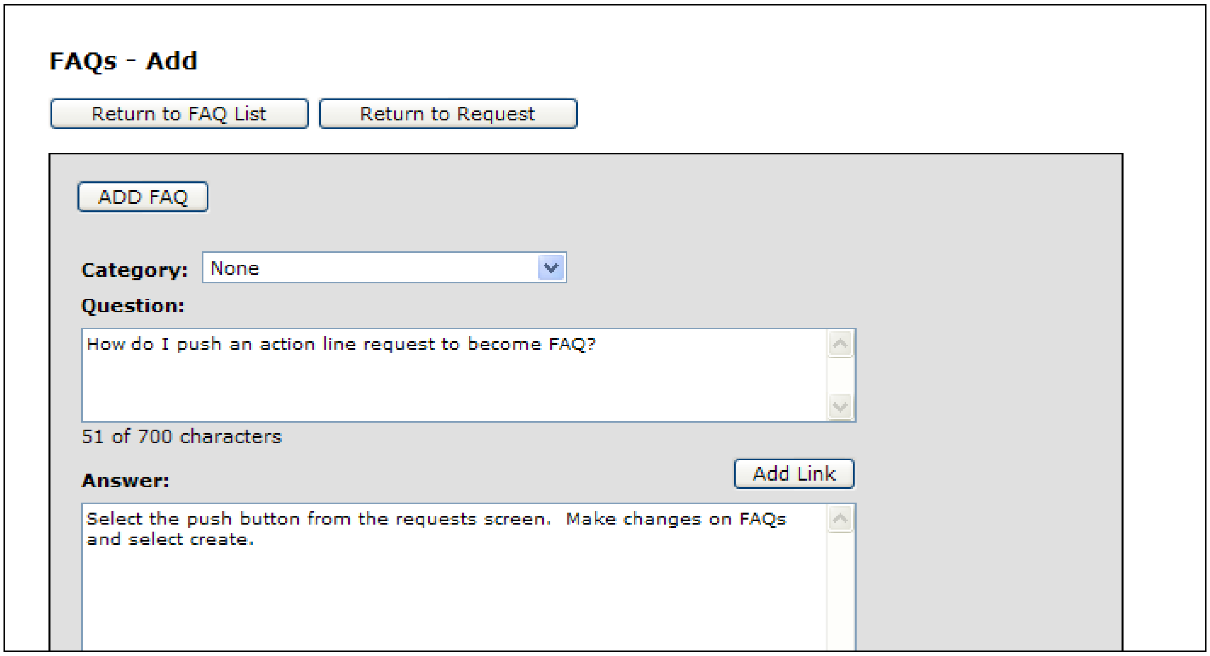
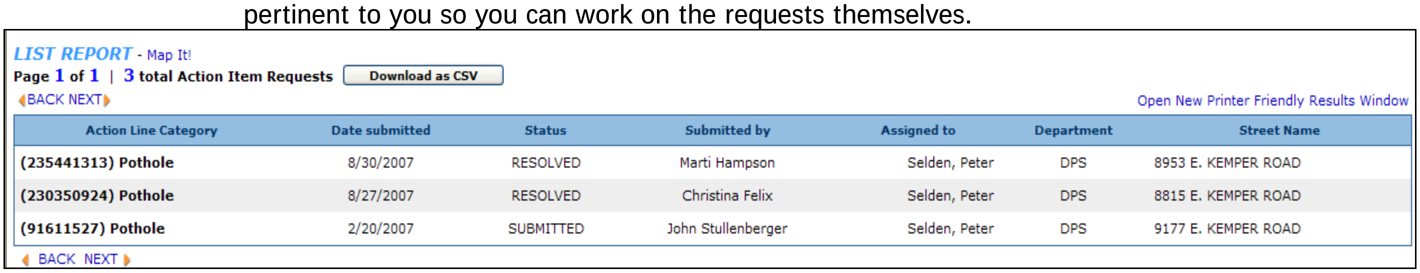


Figure: Pushed action line request to FAQs screen

E-Gov Request Query/Reporting Tool

- The action request list can be filtered by Assigned To (employee), Status, Category/action line form, Department, and specified date range.
- You can also chose to group the results by: assigned to, category, date descending, department, issue/problem location street name, submitted by, and status.
- The action request list can be searched by submitted user's First and/or last name, contact street name, and/or ticket number.
- There are 5 Report Types
  - List Report (Figure List Report)
    - A list report is helpful in finding specific requests. You can filter the screen to only show requests pertinent to you so you can work on the requests themselves.


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: List Report

  - List Full Report (Figure Full Report)
    - A list full report can show you more detail from each request including the request activity log. This would be helpful to see which requests need attention without opening each individual request.

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: List (Full) Report

- Summary Report (Figure Summary Report)
  - A summary report gives you an overview or snapshot of the request system. It can help show what departments or forms receive the most requests. If you group by form it will show you how many action line requests have been submitted for each report type. If you are a mayor or city manager and you want to see which department receives the most requests you would group by department. If you are a department manager you may group by assigned to person and filter by your department.

Action Line Category	Total	Open	Avg. Time still Open	Avg. Time to Complete	% of Requests with Initial Response within 1 Day(s)	% of Requests Resolved within 3 Day(s)
311 Survey	10	7	626.1	< 1.0	30%	30%
Administration Complaint	2	2	440.0	None Completed	0%	0%
Appliance Collection	116	96	417.0	22.2	10.345%	11.207%
Application Employment Form	1	1	918.0	None Completed	0%	0%
Brush	13	1	695.0	155.9	92.308%	69.231%
Building Code Violations	2	1	549.0	< 1.0	50%	50%
Building Maintenance	1	1	140.0	None Completed	0%	0%
Building Permits	9	9	745.8	None Completed	0%	0%
Burning Permit	1	1	857.0	None Completed	0%	0%
CommunityLink - Ask a Question	10	3	49.7	< 1.0	70%	70%
CommunityLink - Post a Comment	2	2	12.5	None Completed	0%	0%
Complaint Form	2	2	561.0	None Completed	0%	0%
Contact E-Gov Link	9	9	652.8	None Completed	0%	0%
Crime Stoppers	7	6	835.7	< 1.0	14.286%	14.286%

Figure: Summary Report

- Detail Report (Figure Detail Report)
  - A detail report is useful if you like the summary report but would like the details of the requests as well.

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: Detail Report

- Status (Summary) Report (Figure Status summary report)
  - A status summary report is helpful to see the status of requests that meet particular criteria.
  - A status summary report grouped by department can show the number of requests in each status. This is helpful to see if each department is responding to requests and that they aren't just staying in one particular status.

STATUS SUMMARY REPORT
Printer Friendly Results

Action Line Category	Submitted	In Progress	Waiting	Total Open	Resolved	Dismissed	Total Closed	Grand Total
311 Survey	7	0	0	**7**	3	0	**3**	**10**
Administration Complaint	2	0	0	**2**	0	0	**0**	**2**
Appliance Collection	96	0	0	**96**	18	2	**20**	**116**
Application Employment Form	9	0	0	**9**	1	0	**1**	**10**
Brush	1	0	0	**1**	12	0	**12**	**13**
Building Code Violations	1	0	0	**1**	1	0	**1**	**2**
Building Maintenance	1	0	0	**1**	0	0	**0**	**1**
Building Permits	9	0	0	**9**	0	0	**0**	**9**
Burning Permit	1	0	0	**1**	0	0	**0**	**1**
CommunityLink - Ask a Question	3	0	0	**3**	7	0	**7**	**10**
CommunityLink - Post a Comment	2	0	0	**2**	0	0	**0**	**2**
Complaint Form	2	0	0	**2**	0	0	**0**	**2**
Contact E-Gov Link	9	0	0	**9**	0	0	**0**	**9**
Crime Stoppers	6	0	0	**6**	1	0	**1**	**7**

Figure: Status Summary Report

Alerts Manager

- This screen gives a summary of the action line forms the category, department and person assigned to each form. (Figure E-Gov Alert Manager)
- From here you can manage the forms.
- Highlight the form and click to select. (Figure Manage Request Form)
- The forms can be assigned to a specific individual with 2 additional notifications of when a request 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: E-Gov Alert Manager

Edit Action Line Request Form Alerts

Back

Cancel Update Update and Add New Escalation

Form Name: Appliance Collection

Department	DPS
Category	Repairs and Requests for Service
Assigned To	Jeffrey Nelson
Notification	Peter Selden
Notification	

Reminders/Escalations

3 day(s) UNRESOLVED Peter Selden

7 day(s) UNRESOLVED Jerry Felix

Return to E-Gov Form Creator

Figure: Manage Request Form

Notification Report

- This screen gives a summary of the action line forms the category, department, person assigned to each form as well as the notifications and escalations set. (Figure E-Gov Alert Manager)
- From here you can manage the forms.
- Highlight the form and click to select. (Figure Action Line Notification Report)
- The forms can be assigned to a specific individual with 2 additional notifications of when a request is submitted. Additional reminders and escalations can also be set (no limit).

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: Action Line Notification Report

CRM Problem Location Tracking / Mapping

Valid Address List (we will load the original list but you can maintain the list by following the instructions below)

- Using the Navigation Menu select Citizen Registration>Valid Address List (Figure Valid Address List)
- 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 and make sure to include the latitude and longitude.
- 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: Valid Address list

CRM Request Mapping

- Using the navigation menu select Action Line>Requests
- Use the Search/Sorting Options to display the requests you would like to map (Figure Map It)
- 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: Map It!

CRM Survey Export

- Set up surveys as Action Line Forms
- Remember to Turn ON “Automatically Set Status to Resolved Upon Submission”
- To Export survey results to Excel go to Navigation>Action Line>Survey Export
- Select Action Line Form and date range, then download CSV

CRM Merge Action Forms to PDFs

- Merge Field names must be set up to map action line data to PDF
  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 Merge Field Name)
  - Enter a name that will allow you to differentiate it from other merge field 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
- Create a PDF using the Merge Fields named within your action line form
- Upload the PDF to the Unpublished Documents section
- Link action line form to PDF by going to Navigation>Action Line>Notification Report
- Select the Action Line form you are managing then choose the PDF from the Documents section
- Once a request is submitted on an Action Line form that is linked to the PDF you will have the ability to go to the request and select the PDF related to the action line form and view/print the PDF.

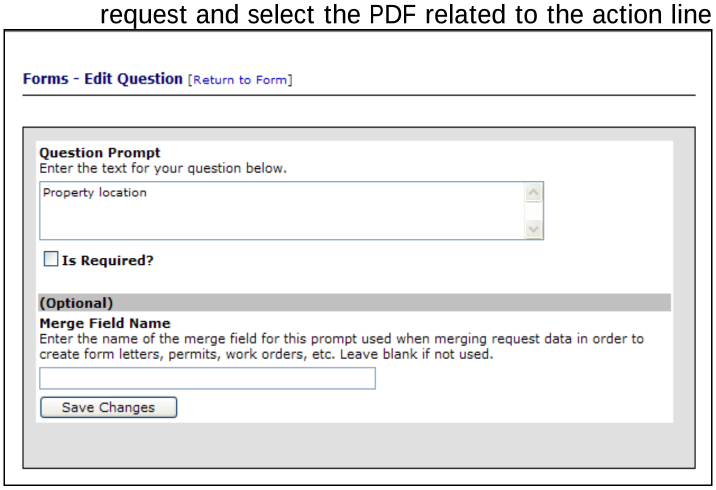
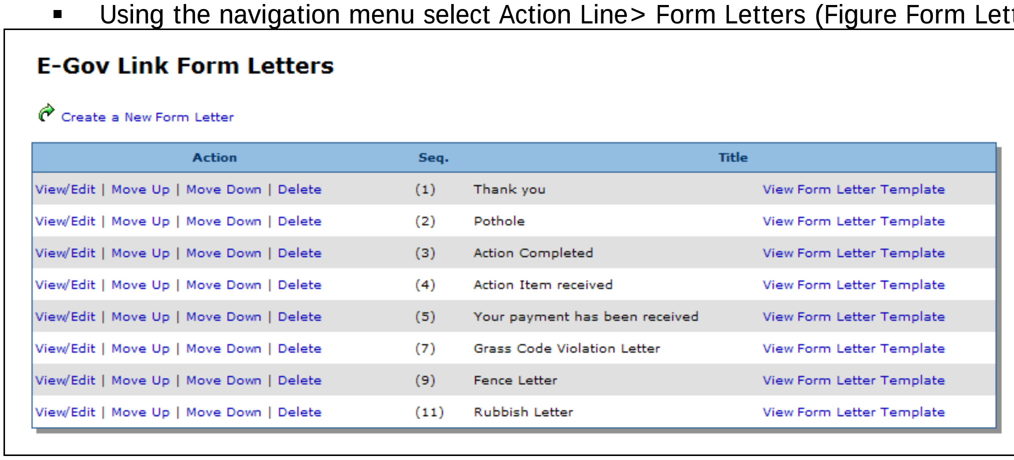


Figure: Merge Field Name

Form Letters

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



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: 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
- Click View/Edit next to the form you created and click the Manage Merge Fields button
- Select the action line form that the form letter should link to

- click save and return to edit form letter
- Finish the form by adding the fields from the form that are necessary.
- Click update 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 Merge Field Name)
- 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

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

CRM 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 Attachments)
- Browse for the file and enter a description for the file you are uploading and select Save
- You can also upload attachments once you have submitted a request on the admin side of the E-Gov application.

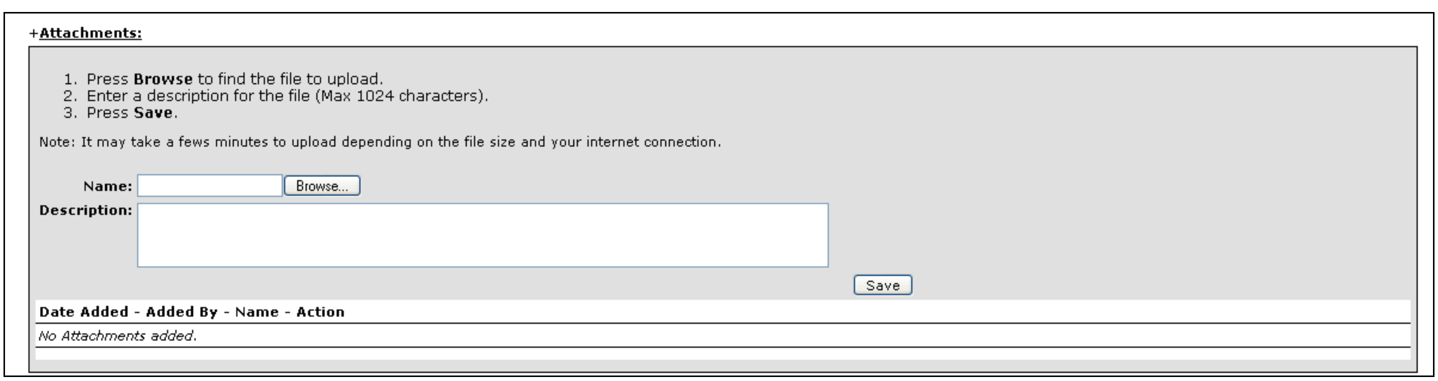


Figure: Attachments

CRM 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

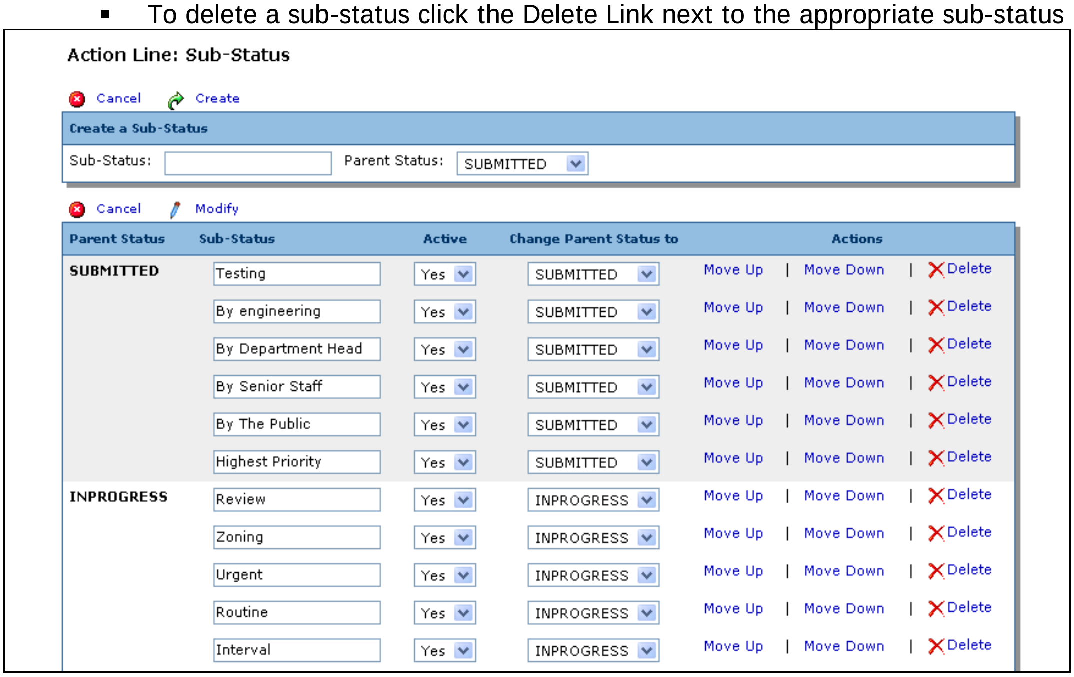
- Using the Navigation Menu select Action Line> Requests
- Click the request you would like to edit
- Scroll down to the Internal Only Use – Administrative Fields and click edit (Figure Administrative Fields)

Figure: Administrative Fields

CRM Sub-Status Reporting

Creating/Deleting a Sub-Status

- Using the Navigation Menu select Action Line> Action Line – Sub-Status (Figure Action Line Sub Status)
- 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



Action Line: Sub-Status

Cancel Create

Create a Sub-Status

Sub-Status: Parent Status: SUBMITTED

Cancel Modify

Parent Status	Sub-Status	Active	Change Parent Status to	Actions
SUBMITTED	Testing	Yes	SUBMITTED	Move Up | Move Down | Delete
	By engineering	Yes	SUBMITTED	Move Up | Move Down | Delete
	By Department Head	Yes	SUBMITTED	Move Up | Move Down | Delete
	By Senior Staff	Yes	SUBMITTED	Move Up | Move Down | Delete
	By The Public	Yes	SUBMITTED	Move Up | Move Down | Delete
	Highest Priority	Yes	SUBMITTED	Move Up | Move Down | Delete
INPROGRESS	Review	Yes	INPROGRESS	Move Up | Move Down | Delete
	Zoning	Yes	INPROGRESS	Move Up | Move Down | Delete
	Urgent	Yes	INPROGRESS	Move Up | Move Down | Delete
	Routine	Yes	INPROGRESS	Move Up | Move Down | Delete
	Interval	Yes	INPROGRESS	Move Up | Move Down | Delete

Figure: 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 Update Sub-Status)
- 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

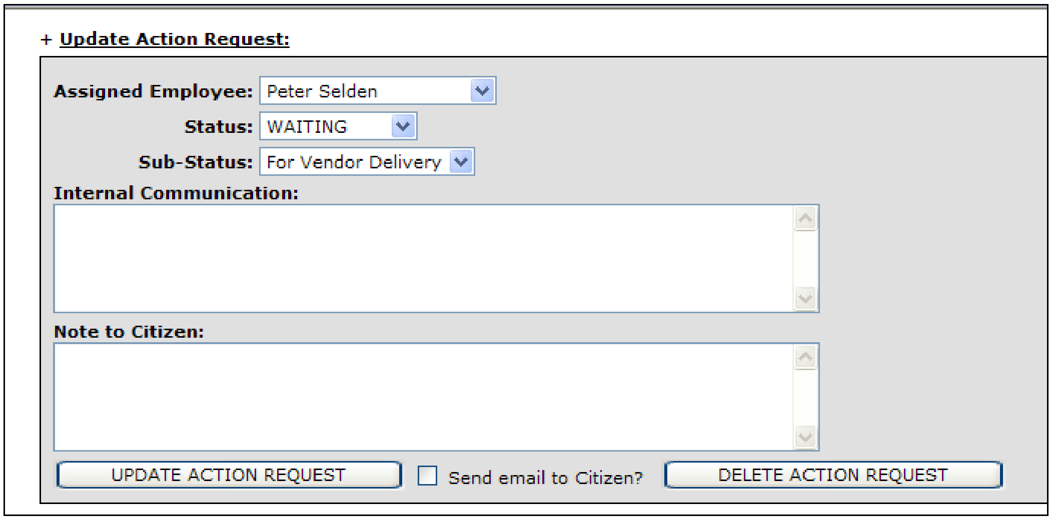


Figure: Update Sub-Status

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

CRM 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 Action Line Code Sections)
- 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

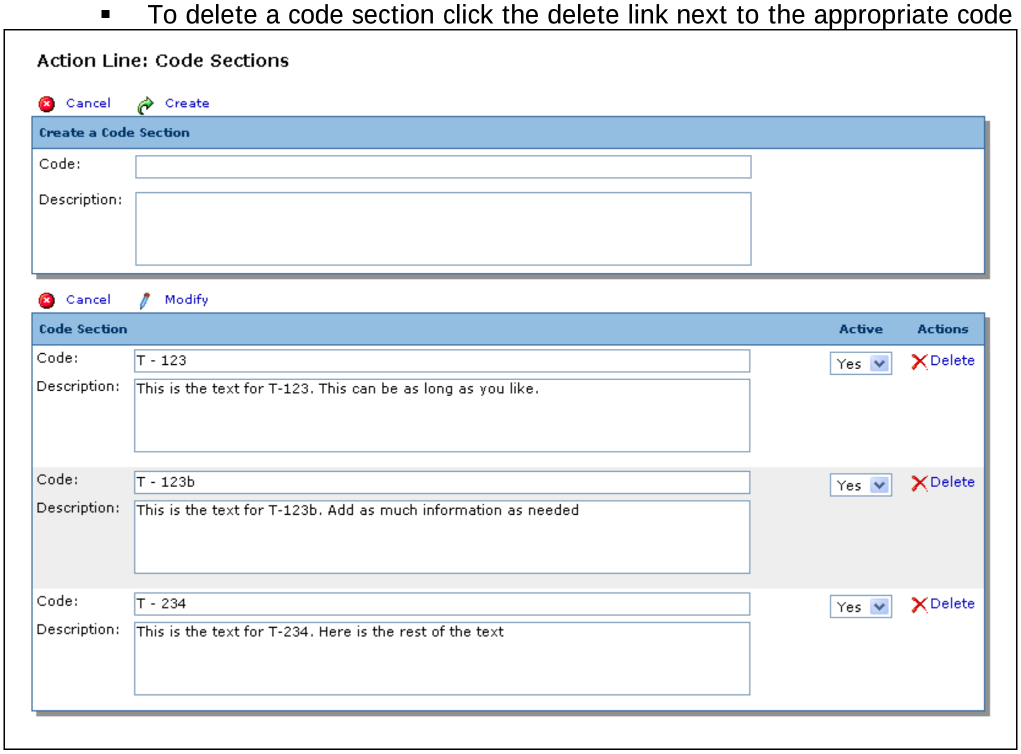


Figure: Action Line Code Sections

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 Code Sections)
- 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

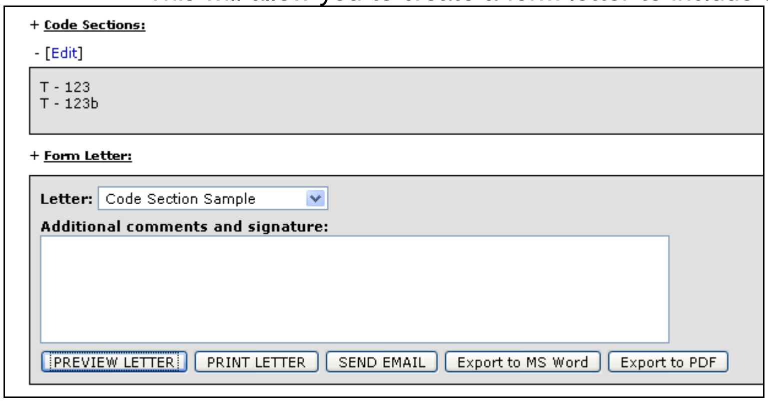


Figure: Code Sections

CRM Reminder Scheduling

- To schedule an email reminder go to Navigation>Action Line>Requests
- Select the request you would like to add a reminder to
- Scroll down to the Email Reminders Section (Figure Reminder Scheduling)
- Select a person to send the reminder to, a date, add comments if you would like
- You can add additional reminders by clicking add reminder and follow the steps above.
- The reminders are not saved until you click update action request
- To remove a reminder check the remove checkbox and click update action request.

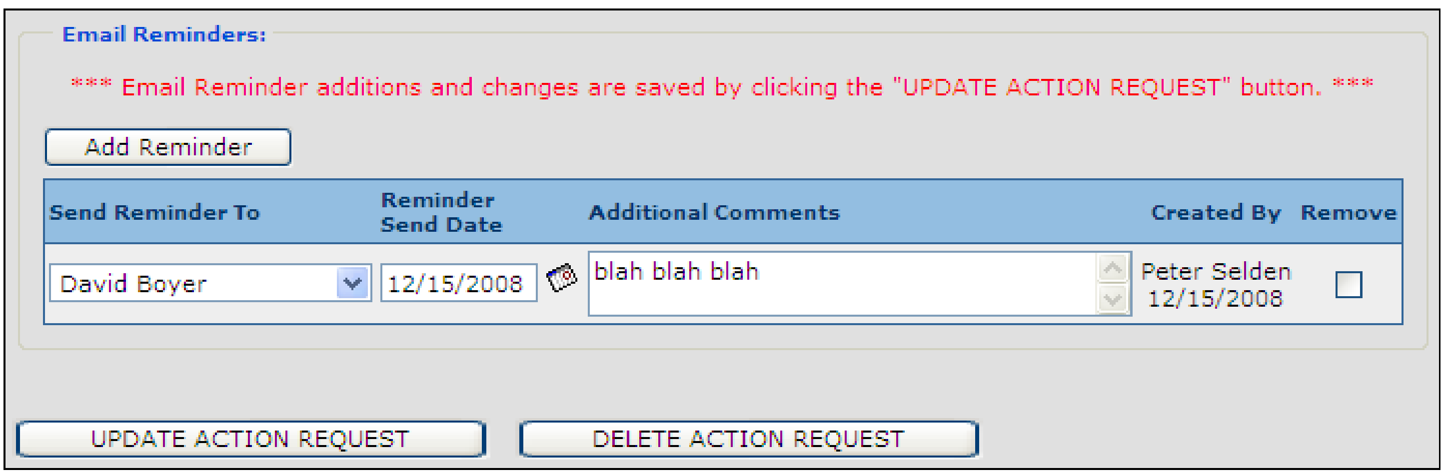


Figure: Reminder Scheduling

E-Gov Basics Other Features

Community Calendar

Adding an Event

- On the navigation menu go to Community Calendar>Create Events (Figure Creating a New Calendar Event)
- 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

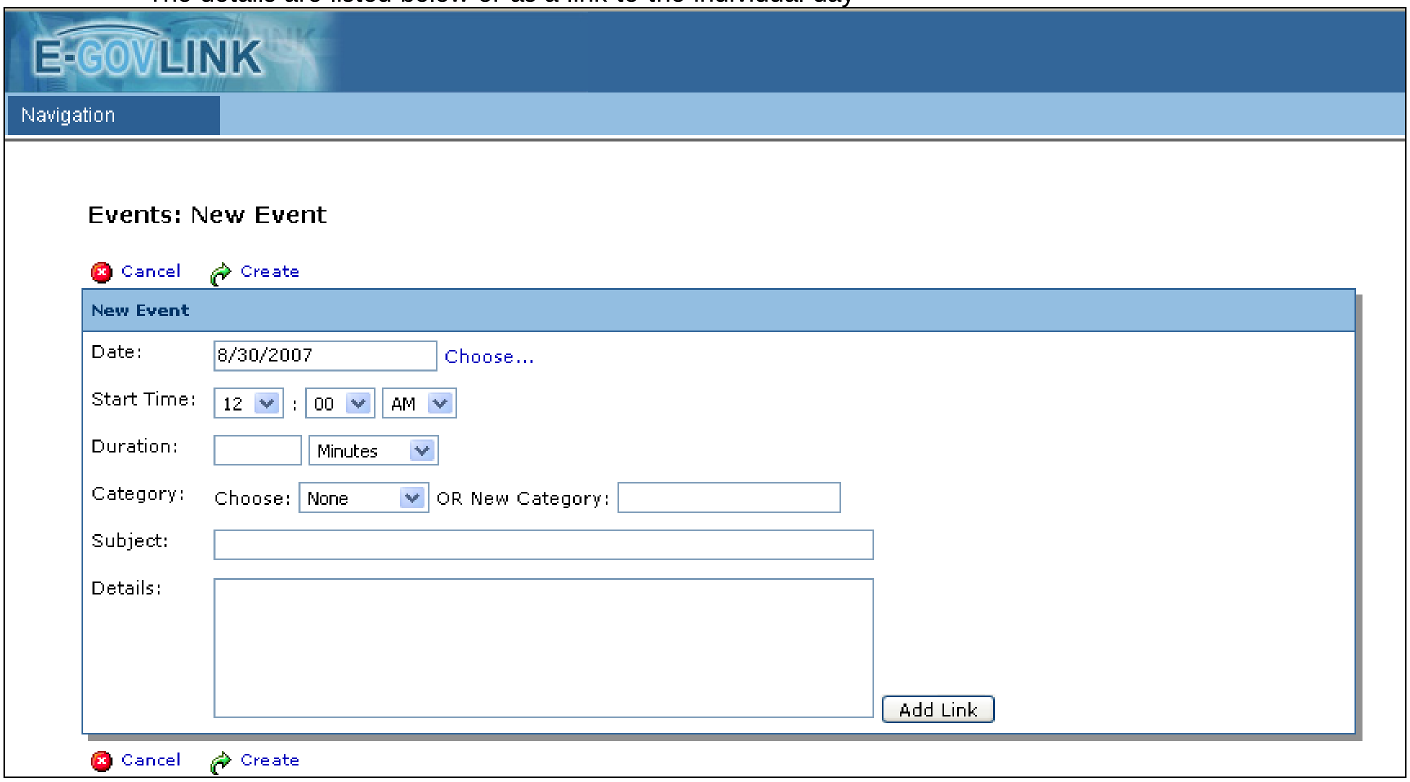


Figure: Creating a New Calendar Event

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 (Figure Adding a Link to a Calendar Event)
- 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

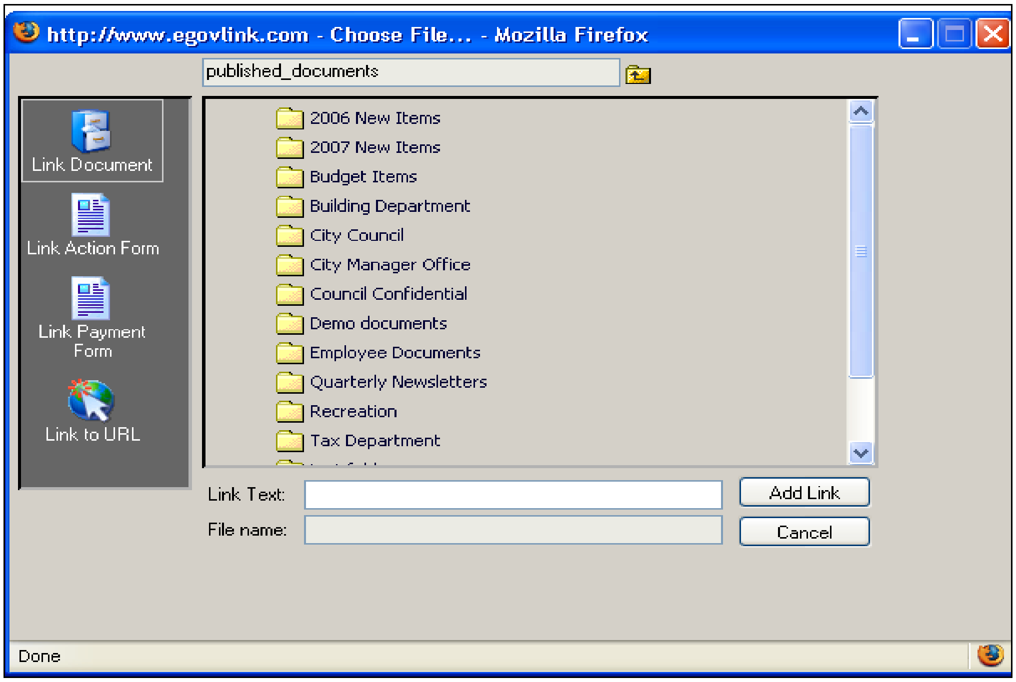


Figure: Adding a Link to a Calendar Event

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 Event Categories) and selecting the Delete link

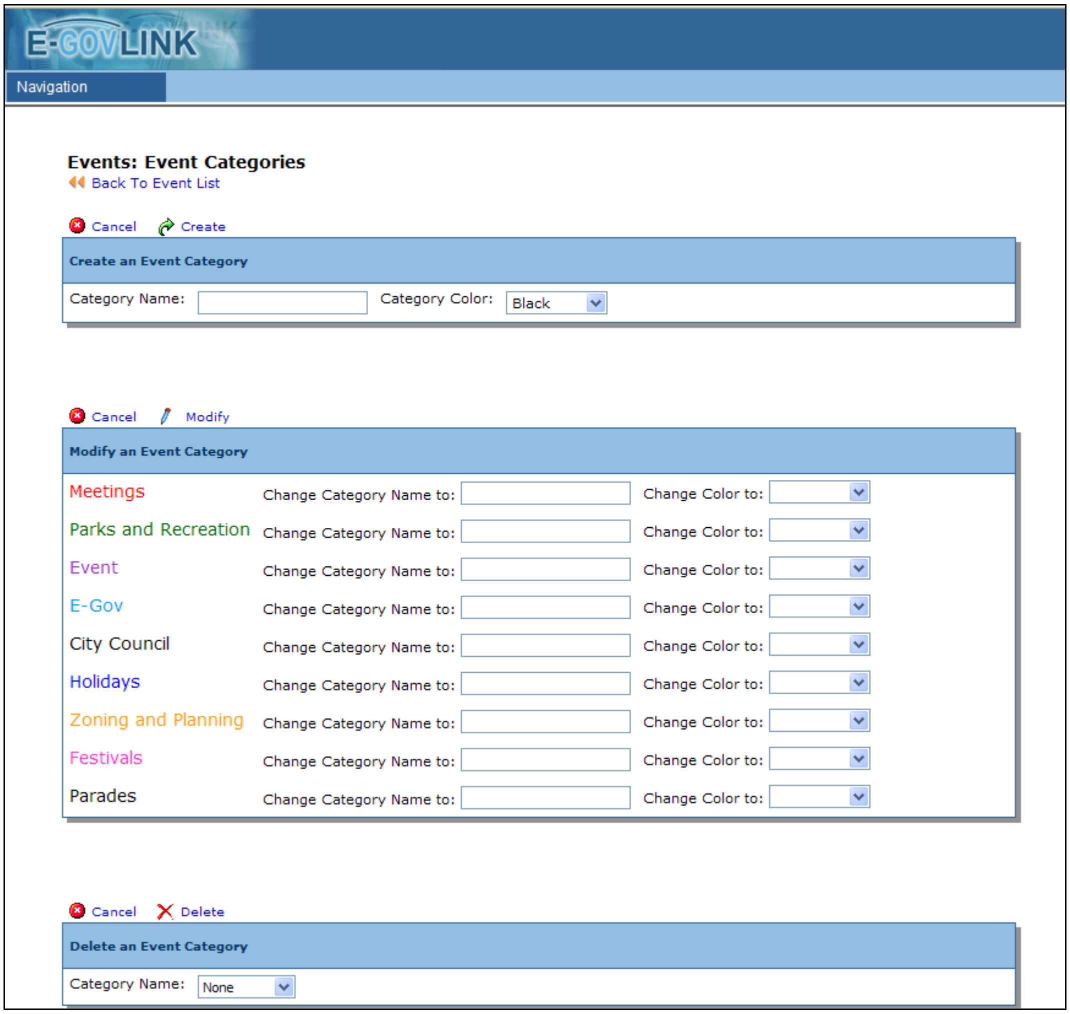


Figure: Event Categories

Multiple / Internal Calendars

Custom calendars

- Each custom calendar is considered a “feature” and will need to be created and turned on for your city by E-Gov Link for you to use.
- E-Gov Link will also have to set a property that will determine if the custom calendar is to be displayed internally or publicly.
- The feature created for the custom calendar is what is used to maintain the events for that custom calendar. Security or user permissions can be assigned to each custom calendar (feature).
- Therefore, someone with the user permission to maintain “Library” may not have the user permissions to maintain “Police Events” and therefore would not see the “Police Events” option in the menubar.
- Like the community calendar on the public side, cities can have an internal calendar(s) that only admin users can see on the admin side of E-Gov.
- *** NOTE: Any calendar NOT set to be displayed on the public-side is considered an “Internal” calendar.
- Unlike the community calendar which has a “Create Event”, “Edit Events”, and “Event Categories” menubar options, the custom calendars are simply listed under the “View Internal Calendars” option.

View Internal Calendars

- To View an Internal Calendar go to Navigation>Custom Calendars>View Internal Calendars
- This allows Admin users to only see the internal calendars not make any changes to them.
- If your organization has more than one internal calendar once you click View Internal Calendars there will be a drop down that allows you to choose what internal calendar to display.

Editing Custom Calendars

- This is the same as the edit screen used for the community calendar
- Follow the same steps under Community Calendar to Add, Modify, or Delete events

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: 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
- Allowed Characters include A through Z, a through z, 0 through 9, underscore, dash, spaces, and one period before the file extension.
- 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) Must have this feature

- 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.

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

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 E-Gov Payment Receipt Manager)
- 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

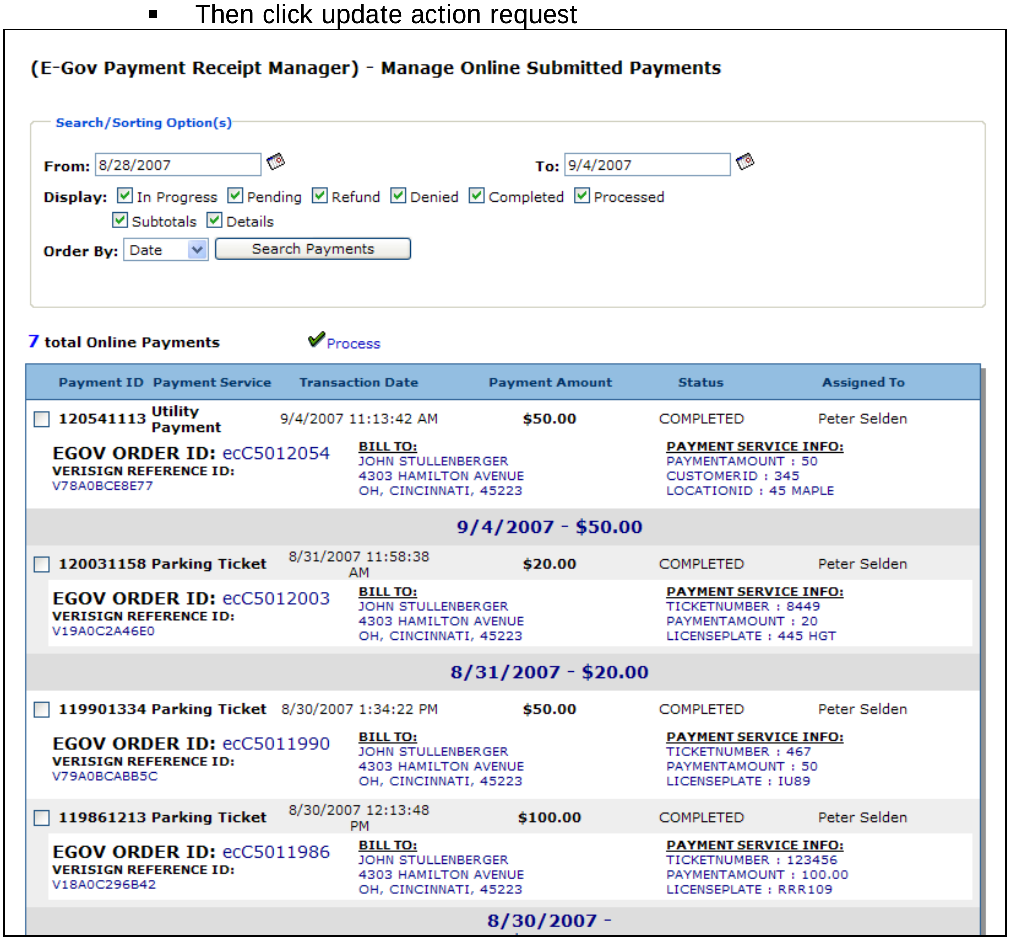


Figure: E-Gov Payment Receipt Manager

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 E-Gov Payment Notification Manager)
- Change the person notified and click update to accept changes or cancel to return to the payment list without saving changes (Figure Manage Payment Form)

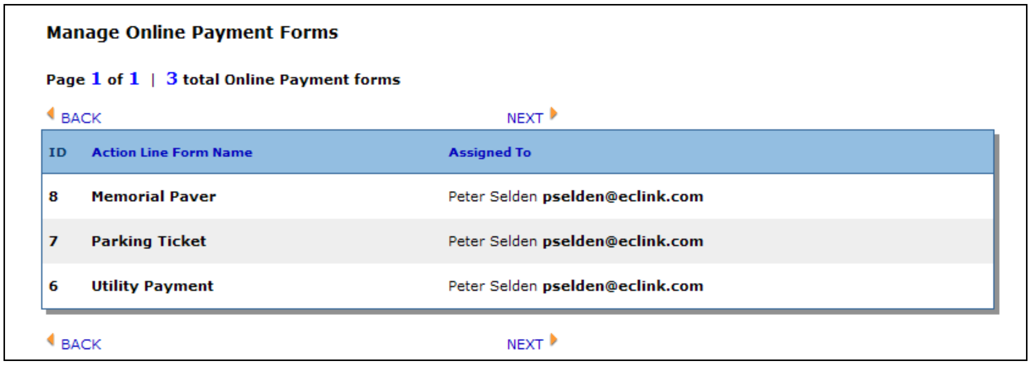


Figure: E-Gov Payment Notification Manager

Figure: Manage Payment Form

Frequently Asked Questions 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 FAQ Items)

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 FAQ Categories)
- 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

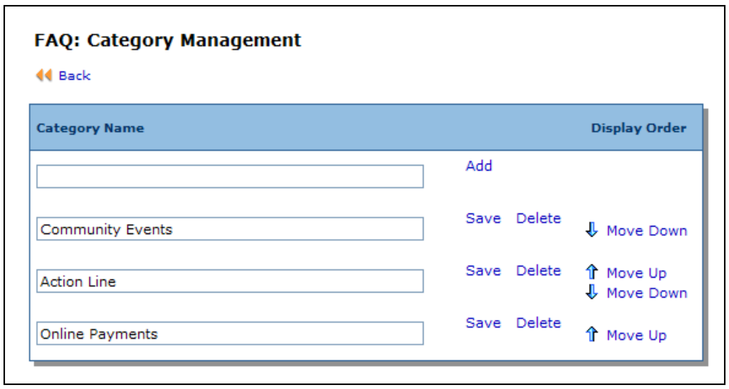
- Select the Delete link next to the category you wish to delete
- Click OK to delete or Cancel to exit without deleting

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: FAQ Items



FAQ: Category Management

Back

Category Name		Display Order
	Add	
Community Events	Save Delete	Move Down
Action Line	Save Delete	Move Up Move Down
Online Payments	Save Delete	Move Up

Figure: FAQ Categories

Push Action Line Request to FAQ

- Open the request that you would like to turn into FAQ: Navigation>Action Line>Requests
- Answer the question and send to citizen, this will put the question and answer in the FAQs page
- Make sure FAQs appears in the dropdown in the upper right corner of the requests page and select the push button. (Figure Push request to FAQs)

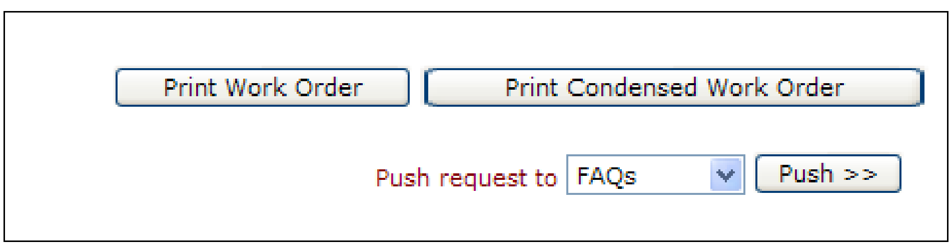


Figure: Push request to FAQs

- Select a Category for FAQ if necessary (Figure: Pushed action line request to FAQs screen)
- Make changes to question and answer if needed
- Add publication start date. If desired you can add a publication end date
- Click ADD FAQ button

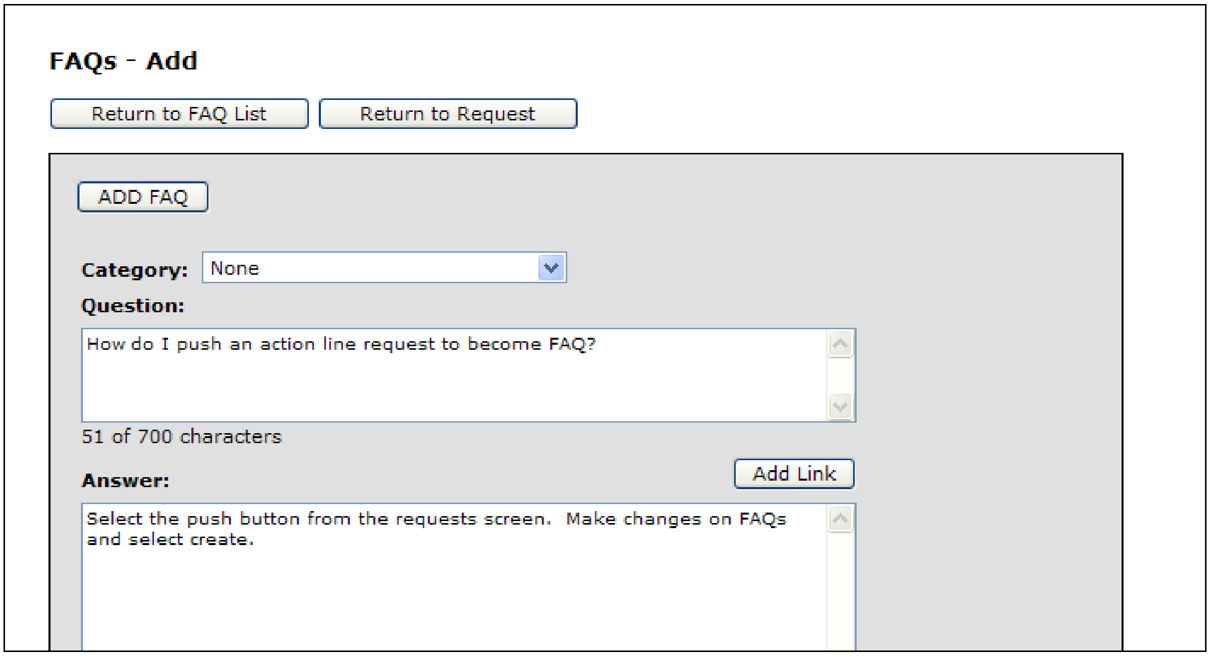


Figure: Pushed action line request to FAQs screen

Link Ask a Question Button to Action Line Request Form

- Create an Action Line Form to allow public to submit a question
- Link Form to the button on public side: Navigation>FAQ>Create/Edit FAQ Items (Figure Ask a Question button on public side) *only appears if you have an action form linked to the button*
- Select the appropriate action line form from the drop down list (Figure: Select action line form from dropdown list)

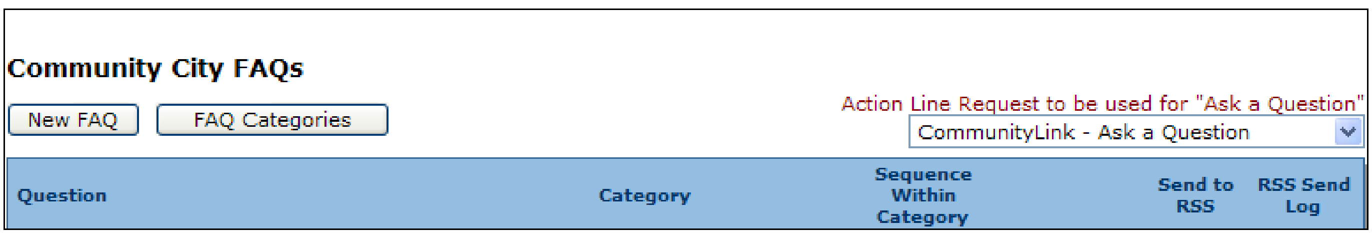


Figure: Select action line form from dropdown list

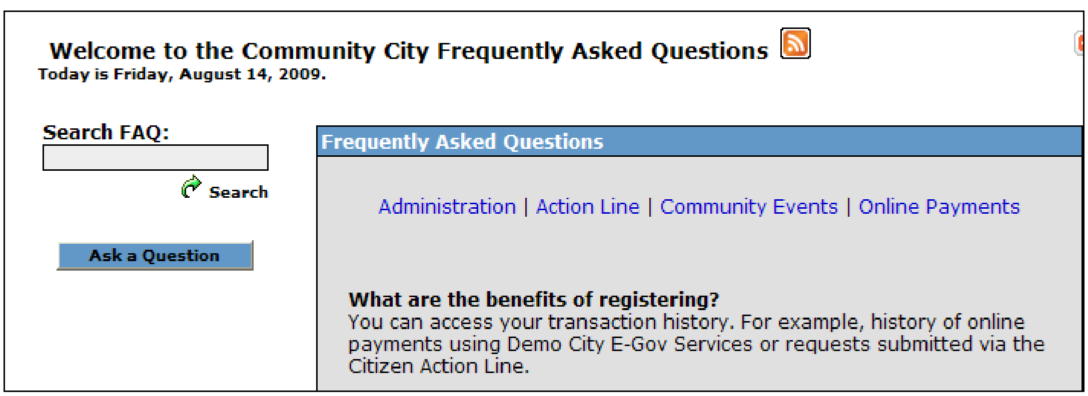


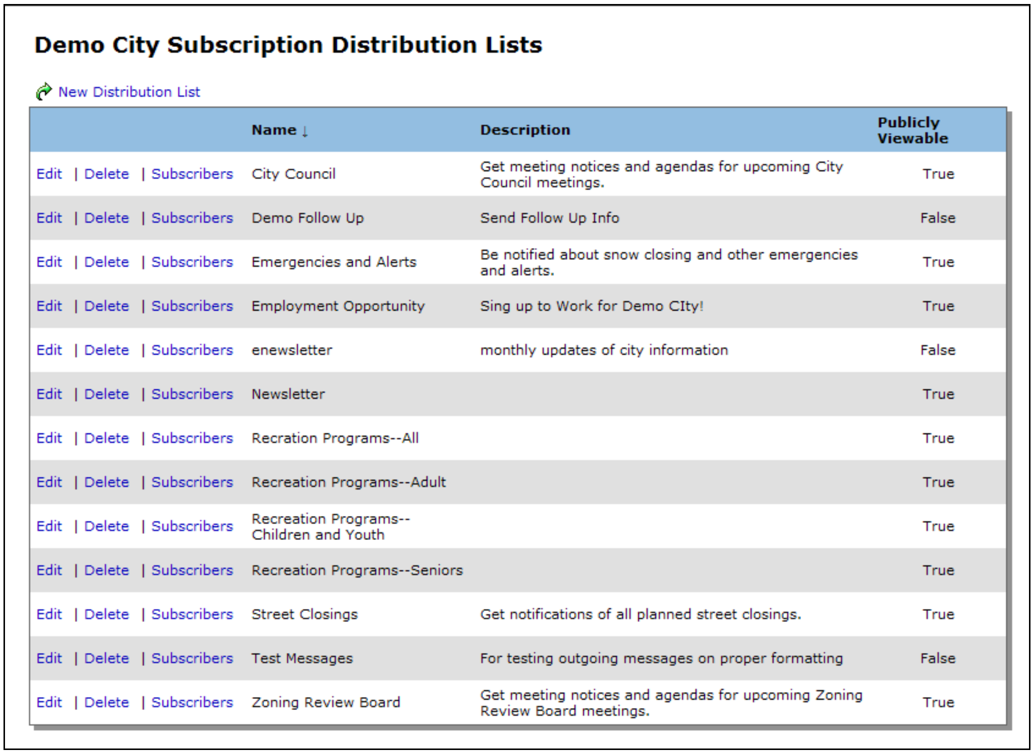
Figure: Ask a question button on public side

Email Subscriptions

Create Distribution Lists

- Using the navigation menu select Subscriptions> Create/Edit Distributions Lists (Figure Create Edit Distribution List)
- Click the New Distribution List Link to create a new distribution list
- Type a name for the distribution list (Figure New Distribution List)

- 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: Create/Edit Distribution List

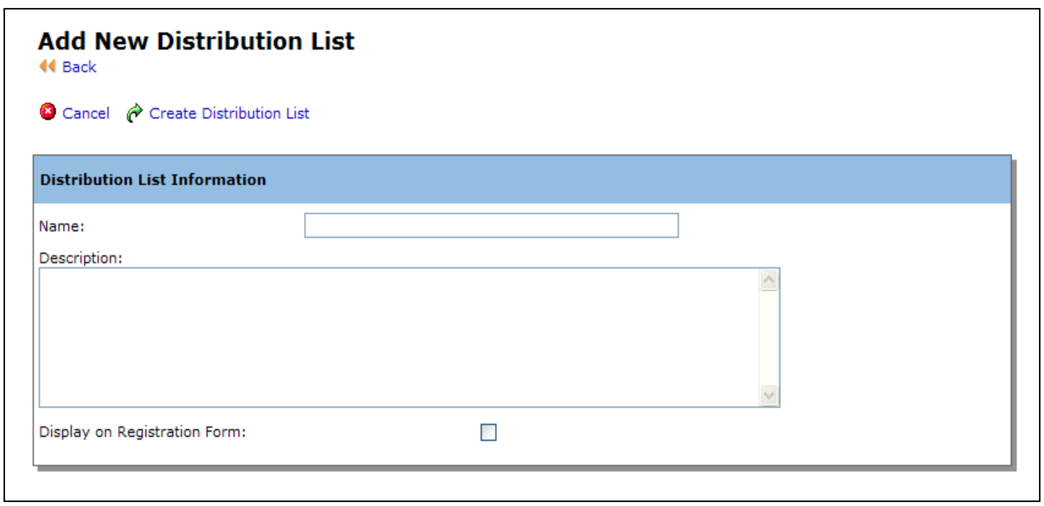


Figure: New Distribution List

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 Send Emails to Subscribers)
- 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

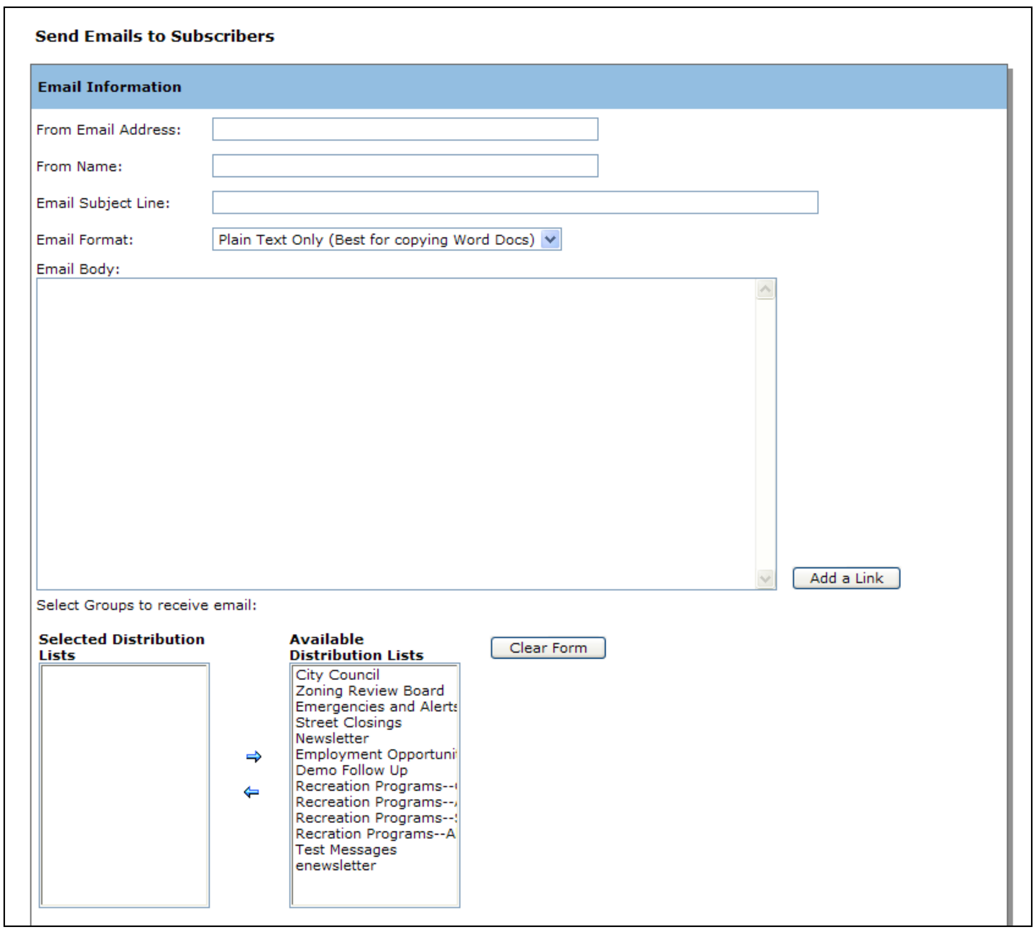


Figure: Send Email to Subscribers

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 Edit Users)
- Make the necessary changes and click update
- To change other users click Back to User List

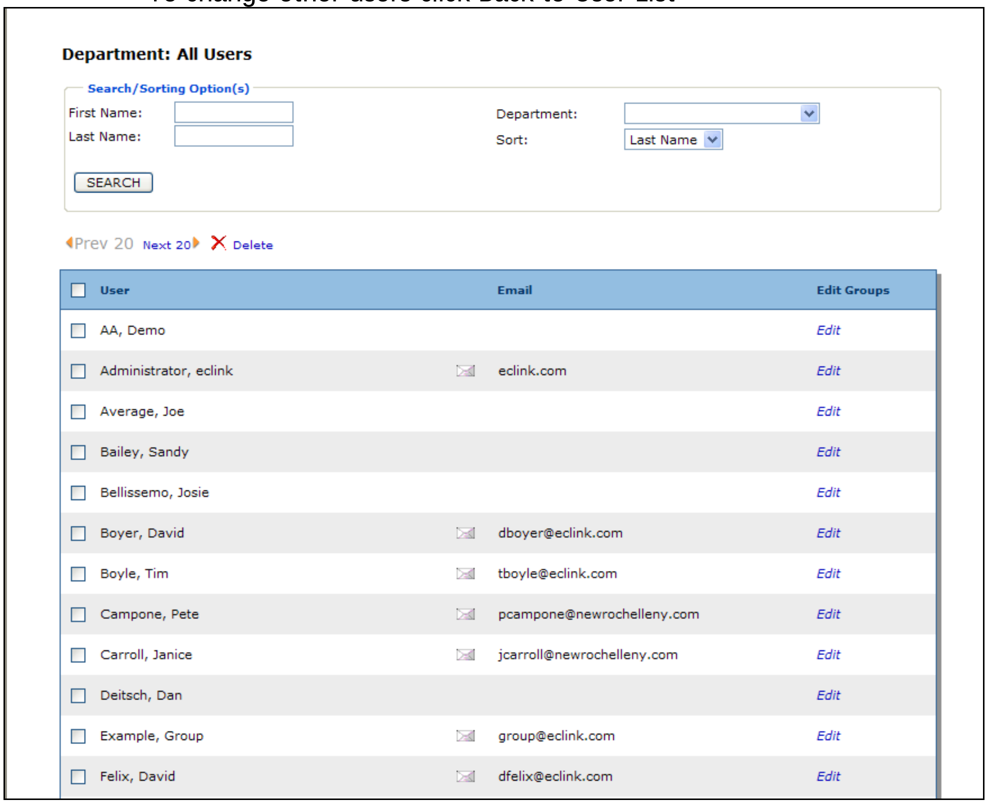


Figure: Edit Users

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 Job Categories
- Click Add

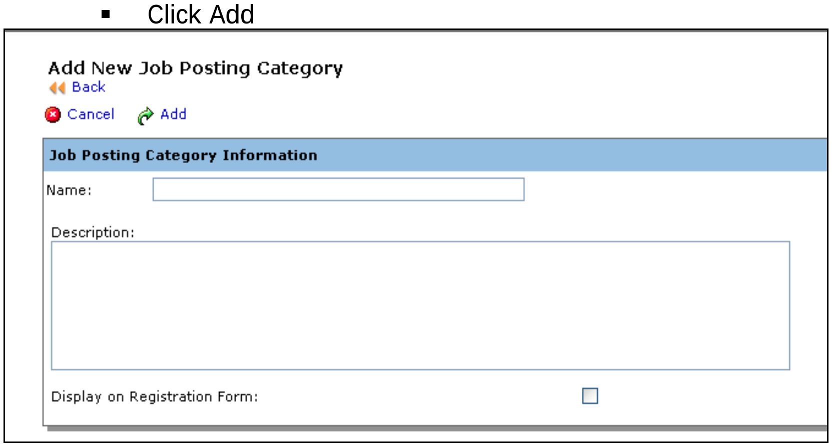


Figure: Job Categories

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
- You can also see who is subscribed to a job by clicking the Export subscribers button.

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 Send Emails to Job Postings Subscribers)
- 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 Add Link)
  - 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

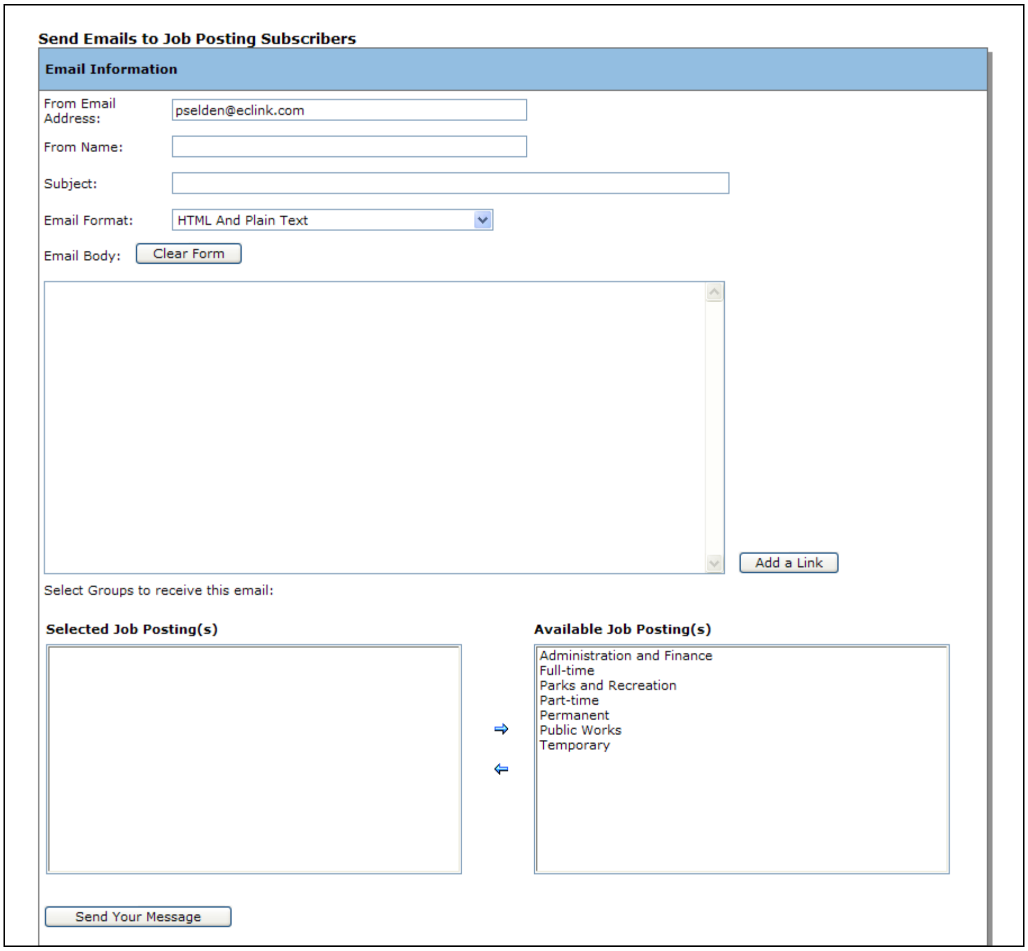


Figure: Send Emails to Job Posting Subscribers

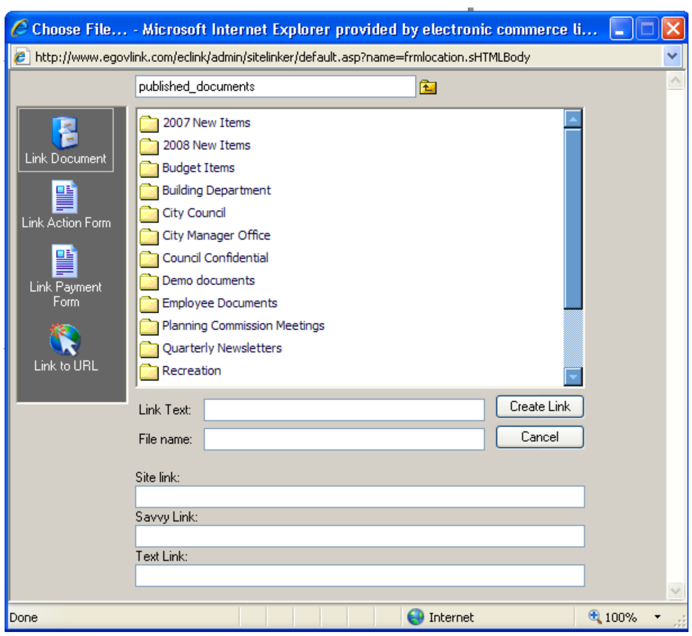


Figure: Add Link

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 Bid Categories
- Click Add

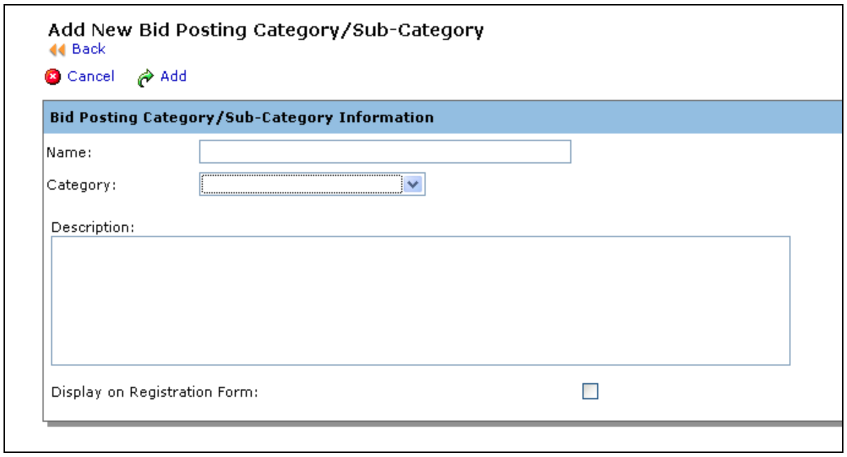


Figure: Bid Categories

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
- You can also see who is subscribed to a bid by clicking the Export subscribers button.

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 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 Send Emails to Bid Posting Subscribers)
- 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

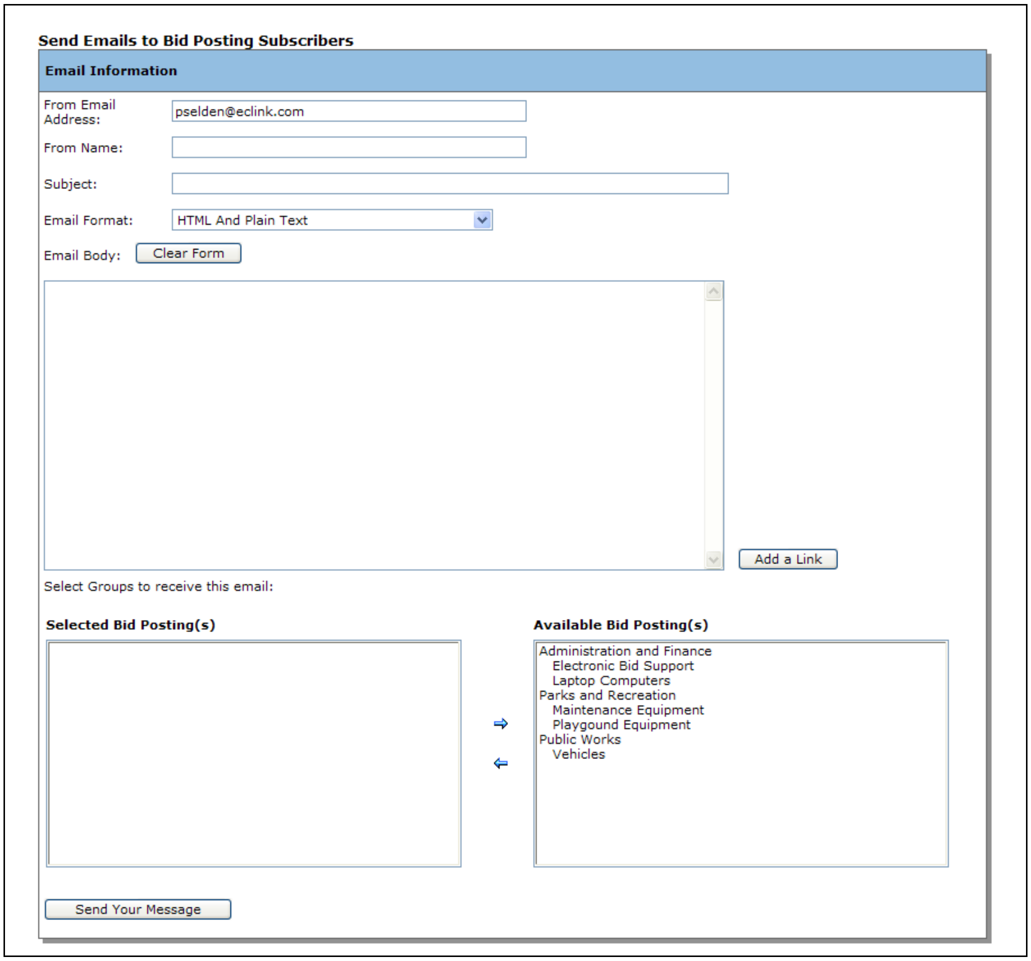


Figure: Send Emails to Bid Posting Subscribers

Advanced Bids

News Scroller

- To add an item to the New Items go to Navigation>News>Maintain News Items
- Click create a news item
- Enter Title and today's date, message body, add a link if necessary
- Enter a publication start date (when you want the news item to be viewable by the public)
- Enter a publication end date if you would like the news item to drop off automatically
- Click the Display checkbox if you would like this news item to be viewable to the public
- Click Create News Item to save.

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 Edit Citizen Users)
- 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 Citizen Groups)
- 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: Edit Citizen Users

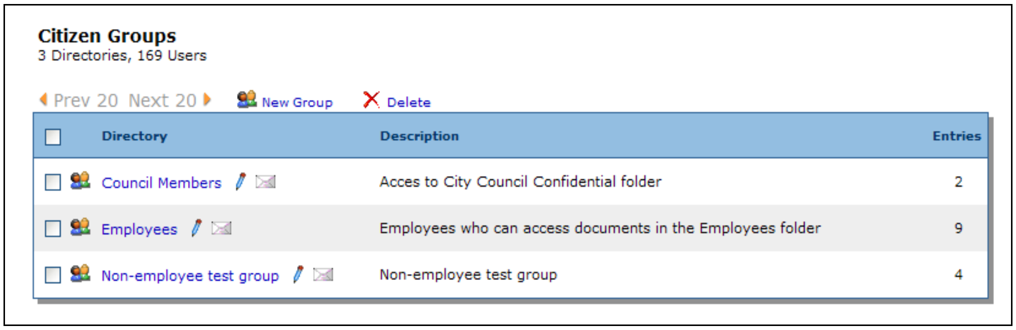


Figure: Citizen Groups