Quick Start Guide

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

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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.

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

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*
    - Make sure to give the "Parent" option as well as sub-categories

Departments

- This allows you to add departments or to change department names
- This is used in the CRM to sort a report by dept

Action Line

Form Categories

- Click Navigation > Action Line > Form Categories
- This link will take you to Action Line Form Categories. This is how your forms will be organized.
- Here you can create action line categories
- Edit the names of categories
- Change the viewing order of the categories
- Delete a category or categories.

E-Gov Action Line Forms Creator

- Click Navigation >Action Line > Form 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/Editing an Action Line Form

- Click Navigation > Action Line>Forms Creator
- Click View/Edit next to Appliance Collection

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
- **Automatically Set Status to "RESOLVED" upon submission On/Off –** This is for surveys because they don't require any more action after the submission. So this option should be left off the majority of the time.
- **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
- **(Click) 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
- **Edit Intro –** This allows you to edit the introduction to explain the purpose of the form. This is in HTML so you can add simple HTML tags to include links to forms or documents
- **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

Editing a Question

- Click edit next to the first question
- Click the edit link above the question
- Change the question prompt, the answer choices or whether it is required
- Click save changes

Adding a new Question

- Click on the Add a new Question Link
- Select the question type from the dropdown menu:
  - 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.

Notification Report

- Navigation > Action Line > 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.

Alerts Manager

- Navigation > Action Line > Alerts
- This screen gives a summary of the action line forms and who each is assigned to.
- Individual forms can be edited.
- Highlight the form and click to select.
- 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).

Creating an Action Line Request (Submit a 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 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.
- Once the request has been submitted the person who submitted the request will receive an email as well as the person assigned to the request.

Manage Action Line Requests (E-Gov Request Manager)

- Navigation > Action Line > Requests
- Provides a summary of all submitted requests. Default view shows every request that has been submitted
- You can search/sort by various options including who the request is assigned to, by category, dept., date etc.
- By clicking on a specific request the details can be viewed and edited.

Editing an Action Line Request (Open Submitted Request)

- Using the Navigation > 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.
  - The request activity cannot be deleted. You will always know what has been going on with a request by viewing the log

  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

  Send Email Notification
  - Allows you to notify other Admin users about the citizen concern
  - 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

  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

E-Gov Request Query/Reporting Tool (Download to CSV)

- 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
  - List Full Report
  - Summary Report
  - Detail Report

Community Calendar

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 and selecting the Delete link

Adding an Event

- On the navigation menu go to Community Calendar>Create Events
- 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
- 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

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

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

Documents

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

Published Documents Folders

- Published documents is where you place documents you want viewable by the public. <u>The documents must first be placed in a folder</u>. 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

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.

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

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.

Adding a Folder

- <u>The documents must first be placed in a folder</u>. If there's no folder, the document will not appear.
- 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 re-named, however a new 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

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

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