Accela Civic Platform^{TM} White Paper

Getting to Know the New Interface

Accela

Civic Platform 8.0: Getting to Know the New Interface

Version 8.0
September 2015

Corporate Headquarters

2633 Camino Ramon
Suite 500
Bishop Ranch 3
San Ramon, CA 94583

Tel: (888) 722-2352
Fax: (925) 659-3201

www.accela.com

Civic Platform 8.0: Getting to Know the New Interface
Welcome!

3

Welcome!

Welcome to the Accela Civic Platform, and welcome to a new user interface designed to provide you with an intuitive, pleasant user experience, even as it helps you get your job done more effectively and efficiently.

Choose from the following list of topics to learn more about the new interface, and how you can leverage its features and functionality to make your work sessions more productive.

Introducing Civic Platform 8.0

- Taking a Tour of the New Interface
- Figuring Out How to Do Your Job When Everything is Different

Getting In, Getting Out, and Getting Around

- Logging In and Logging Out
- Changing Your Password
- Switching Between the New Interface and the Previous One
- Accessing the Administration Tools

Navigating the New User Interface

- Switching Between Dashboards
- Using Search in the New Civic Platform User Interface
- Using the Launchpad
- Working with Spaces
- Interacting with the Task Dashboard
- Interacting with the Map Dashboard

Introducing Civic Platform 8.0

The new Civic Platform 8.0 interface is a new experience. Once you get to know the tools you have available to you, you will quickly discover how useful they can be in helping you do your job.

Topics

- Taking a Tour of the New Interface
- Figuring Out How to Do Your Job When Everything is Different

Taking a Tour of the New Interface

Although the new Civic Platform user interface is designed to be intuitive and easy to use, it is helpful to take a moment to acclimate yourself to the environment and the tools available to you.

- Getting to Know The Home Page
- Getting to Know the Tasks Dashboard
- Getting to Know the Maps Dashboard
- Getting to Know the Application Bar
- Getting to Know the Main Menu
- Getting to Know the Launchpad
- Getting to Know Spaces
- General Navigation Tips

Getting to Know The Home Page

The home page is the starting point for anything you want to do in the new interface.

HOME PAGE

application
bar →

main
menu →
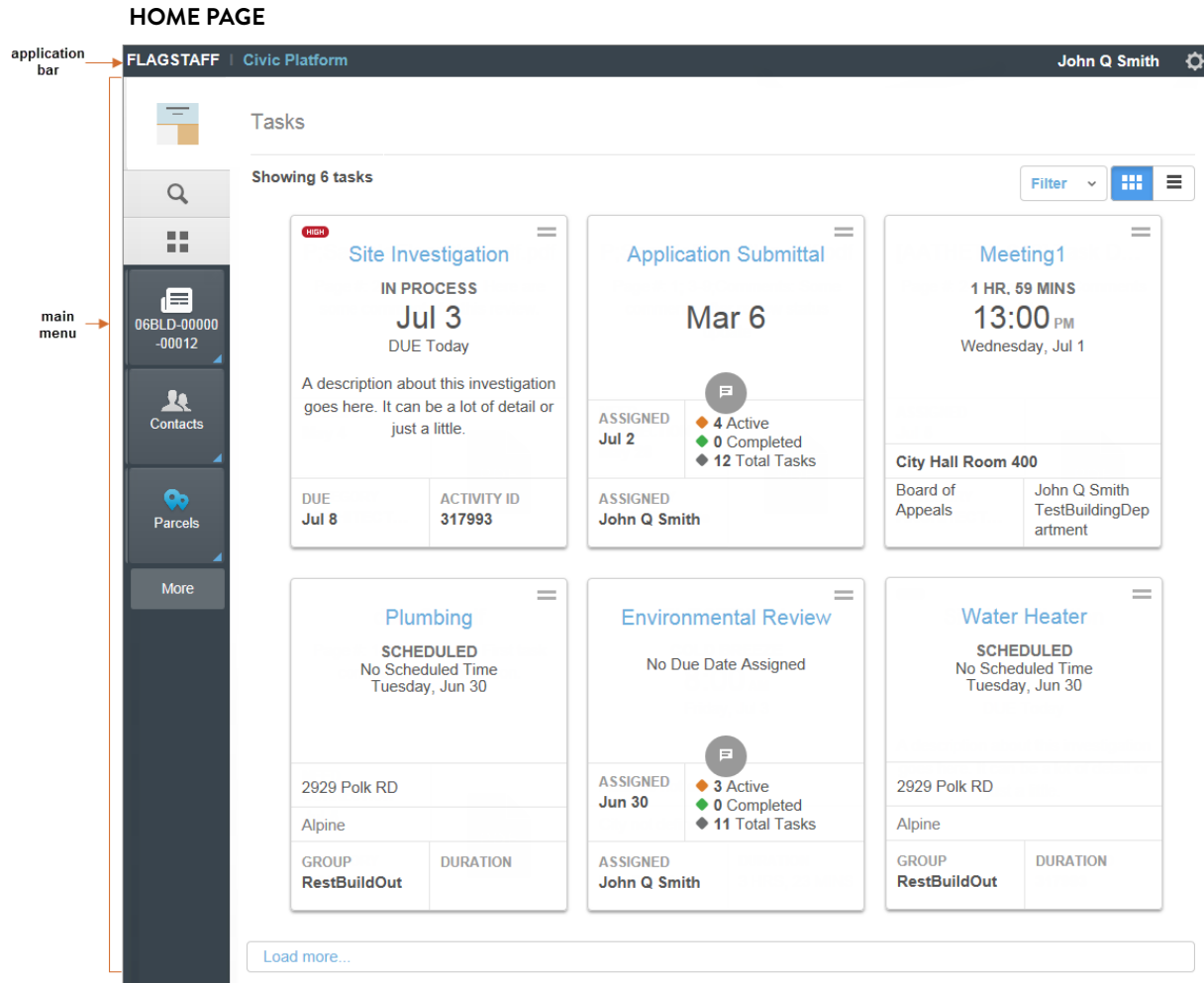
Getting there

- Log in. The home page always displays first.
- Click your agency's name in the upper left-hand corner of the window to return to your home page.

Features of the home page:

- The tasks dashboard is essentially your day's to-do list (see Getting to Know the Tasks Dashboard).

- The application bar helps you get to where you need to be (see Getting to Know the Application Bar).

- The main menu provides you with the tools to access and organize your work spaces, as well as to find what you need (see Getting to Know the Main Menu).

- Access to the launchpad (see Getting to Know the Launchpad).

- Access to global search (see Performing a Global Search).

Related Links

- Switching Between Dashboards

- Using Search in the New Civic Platform User Interface

- Using the Launchpad
- Working with Spaces

Getting to Know the Tasks Dashboard

The tasks dashboard has 2 display options: Card View and List View. Both views list tasks assigned to you. You can toggle between the two views whenever you want.

Card View

Features of the task dashboard card view:

- Each task card is a separate task assigned to you. Six cards display by default when the page first loads. See Task Card Example to learn more about task cards.
- The **Filter** control gives you some input into which tasks display.
- A dashboard display options toggle lets you switch to a list view.
- The **Load More** link allows you to view more of your tasks in increments of six.

Related Links

- Interacting with the Task Dashboard

Task Card Example
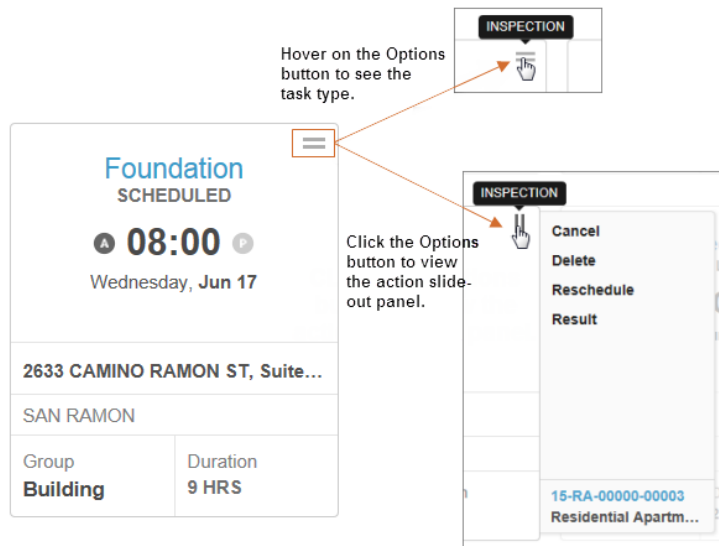
Features of the task cards:

- Task card titles tell you at a glance what the task is.

- Click titles in blue text to open the task details in a new space. Black text titles (non-hyperlink) are a visual cue that you do not have permission to act on a task.

- You can hover on the options button to identify the task type.

- Every task card has a slide-out panel that provides you with a list of actions you can perform on the task. Slide-out panels may also provide hyperlink access relevant records, such as a permit record or a primary contact.

- Key information for tasks displays on the card, including important data such as due date, schedule time, comments, and more.

- Icons indicating holds, conditions, notes, and locks, display prominently on task cards as bright colored icons that you can click to get more information.

Related Links

- Things You Can Do on a Task Card
- Details You Can Glean from a Task Card
- Getting More Information About Conditions, Holds, Notices, and Locks
- Looking at Task Card Examples

List View

Features of the task dashboard list view:

■   Task items are listed in a table format. Six tasks display by default when the page first loads.

■   You can select one or more task items and perform actions on them (see Using the Task List).

■   The **Actions** button gives you access to commands you can apply to one or more task items.

■   The **Filter** button gives you some control over which tasks display.

■   You can toggle to a task card view using the dashboard display options.

■   Use the **Load More** link to view more of your tasks.

Related Topics

■   Interacting with the Task Dashboard

■   Using the Task List

■   Getting the Most from Your Task Cards

Getting to Know the Maps Dashboard

The maps dashboard provides you with another way to identify and analyze land-use, zoning, inspection or service request routes, infrastructure, and other geo-centric information.

It is the next generation version of Accela GIS 7.x Map Viewer.

MAPS DASHBOARD
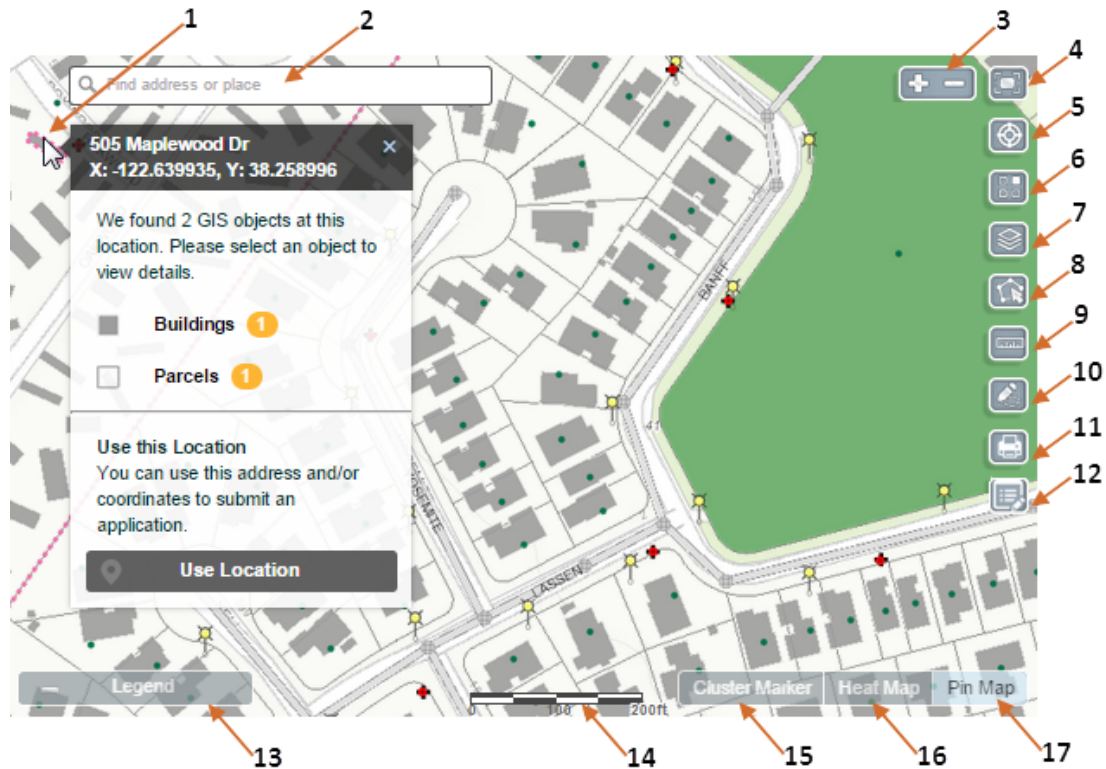
Features of the maps dashboard:

- Point and click to see a location's address, coordinates, and associated GIS objects. (1)

- Find an address or place. (2)

- Zoom in or out. (3)

- Reset the map display to the Default extent, which is the initial area shown on the map. (4)

- Bookmark locations and navigate to bookmarked locations. (5)

- Choose a basemap. (6)

- Arrange how your map layers display. (7)

- Multi-select points on the map to form the vertices of a shape and select GIS objects contained within the shape. (8)

- Measure area, distance, or longitude/latitude. (9)

- Annotate your map view with lines and shapes, as well as text. (10)

- Print a map to a PDF or a printer. (11)

- Edit layers and map features. (12)

- View the legend to understand map symbols. (13)

- View measurement scales and ratios of map vs. actual. (14)

- View a pin map, where locations are marked with pins. (15)

- View a heat map, where gradient hotspots are featured. (16)

- View a cluster map, where locations are marked by numbered dots that represent grouped locations. (17)

Related Topics

- Interacting with the Map Dashboard

- Locating Places

- Moving Around and Selecting Objects

- Creating and Editing Map Features

- Integrating with Civic Platform Data

Getting to Know the Application Bar

| AGENCY NAME | Civic Platform   John Q Smith ⚙ |

click to return to home page   settings button

Features of the task dashboard list view:

- You can click the agency name on the left side to return to your home page.

- You can click ⚙ (Settings) to access a menu of actions (such as opening the administration tool or signing out).

Getting to Know the Main Menu

The main menu is your control pad for adding, finding, and accessing content.
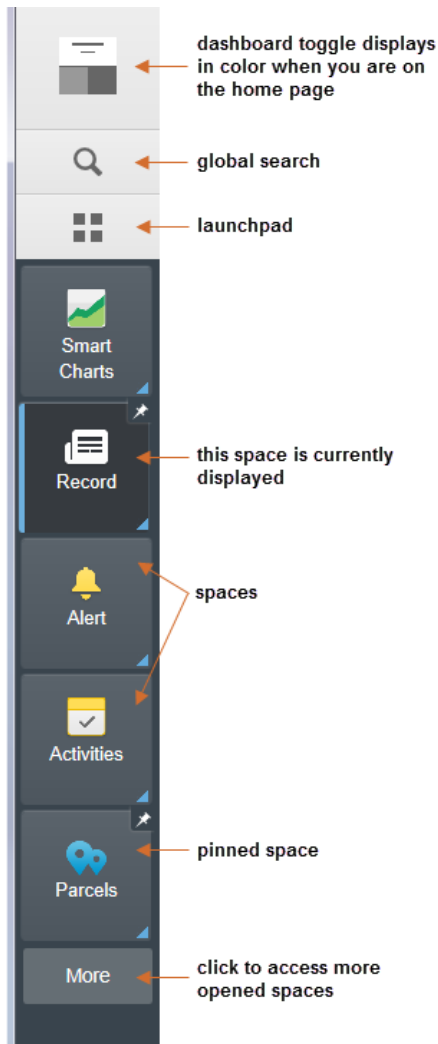
Features of the main menu:

- The dashboard toggle lets you switch between a task-centric view and a map-centric view.

- The global search makes it easy for you to search for just about anything.

- The launchpad is your principal tool for accessing pages and records. It is also where you start the process to create a new application.

- When you select any page from the launchpad, it opens in a new space. That space is anchored on the main menu until you close it.

Related Links

- Switching Between Dashboards

- Using Search in the New Civic Platform User Interface

■   Using the Launchpad

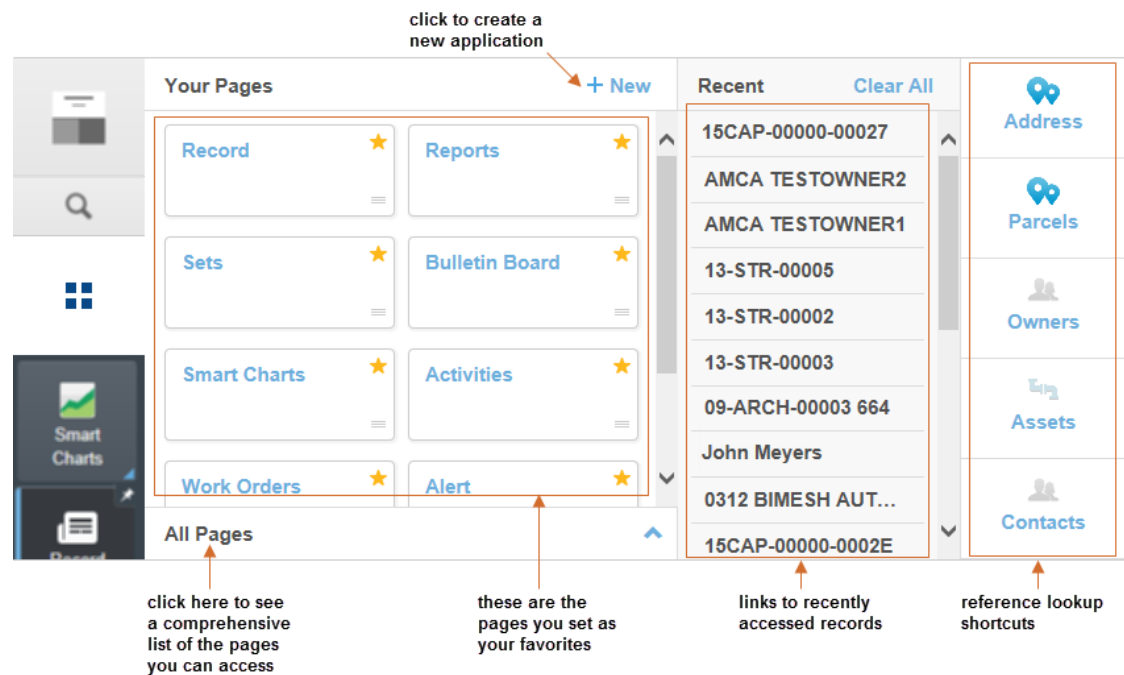■   Working with Spaces

Getting to Know the Launchpad

The Launchpad is your access point to just about everything you want to do in Civic Platform. Any link you click within the launchpad opens a new space for where you can interact with the data you selected.

click to create a
new application

click here to see
a comprehensive
list of the pages
you can access

these are the
pages you set as
your favorites

links to recently
accessed records

reference lookup
shortcuts

Getting there	Click the launchpad toggle on the main menu.

Features of the launchpad:

■   Click **+New** to create new applications.

■   Mark frequently used pages as favorites for quick access.

■   Click **All Pages** to see all of the pages available to you. Use the filter to locate a page quickly.

■   Use the recent records links to return to a page or record you recently worked on.

■   Locate a reference address, parcel, owner, asset, or contact by clicking a reference shortcut, then entering search criteria.
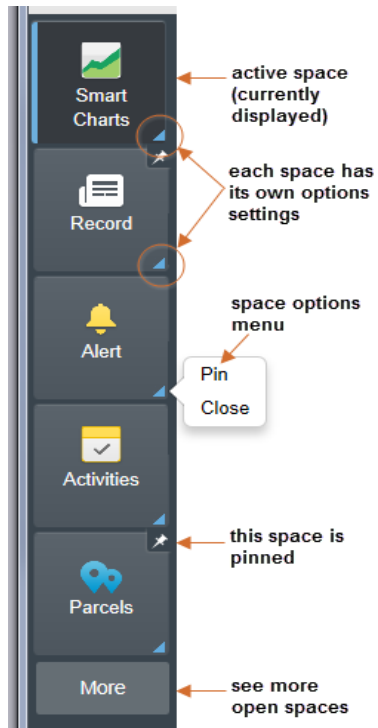
Related Topics

■   Using the Launchpad

■   About Your Pages

- Defining a Page as a Favorite
- Accessing Recent Records
- Accessing Reference Pages

Getting to Know Spaces

Every time you open a page from the launchpad, you create a new space.

Features of the spaces menu:

- You can pin spaces to keep them in your main menu. Every time you log in, your pinned spaces are there.

- The spaces layout enables you to move from page to page quickly. Just click the spaces

- Each space has its own space options menu that you can use to customize your main menu.

- You can have up to 20 spaces open at one time.

- Use the **More** link to view spaces that don't fit on the menu.

Related Topics

- Working with Spaces

General Navigation Tips

### How to Tell What Is a Hyperlink and What Isn't

Not all hyperlinks are readily apparent in the new user interface. When in doubt, use one of these techniques to identify hyperlinks.

- Method 1: Is the text blue? In general, Civic Platform hyperlinks display as blue text. There are some exceptions to this, however, such as the space icon labels, or the hyperlinks contained in the application bar at the top of the display. You may also find graphical icons that are hyperlinks.

- Method 2: When you mouse over an active hyperlink without clicking, an underline appears. This only works if it's text, however.

- Method 3: When you mouse over an object without clicking, the cursor changes from an arrow ⬚ to a pointing hand ⬚ if it is an active hyperlink. Click while the hand displays to activate the hyperlink.

Closing Detail Slide-outs

When you click an activity or document task card, the details do not display in a new space. Instead, a slide-out displays, containing details. You can exit a slide-out in more than one way.

- Clicking the exit button in the upper right-hand corner of the slide-out closes the display.
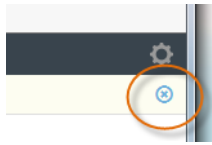
- Clicking another object outside of the slide-out (for example, the agency "home" link) closes the slide-out display, then the new object displays.

Navigating List Pages

When you open a list page (such as the Work Orders page) in a new space, you see a list of records - in this case, a list of work order records. You can interact normally with rows on the list page by selecting rows and using toolbar buttons, or you can open records by clicking a hyperlink.

However, if you open a record from the list page, it is important to note that the record displays in the same space. It does not open in a new space.
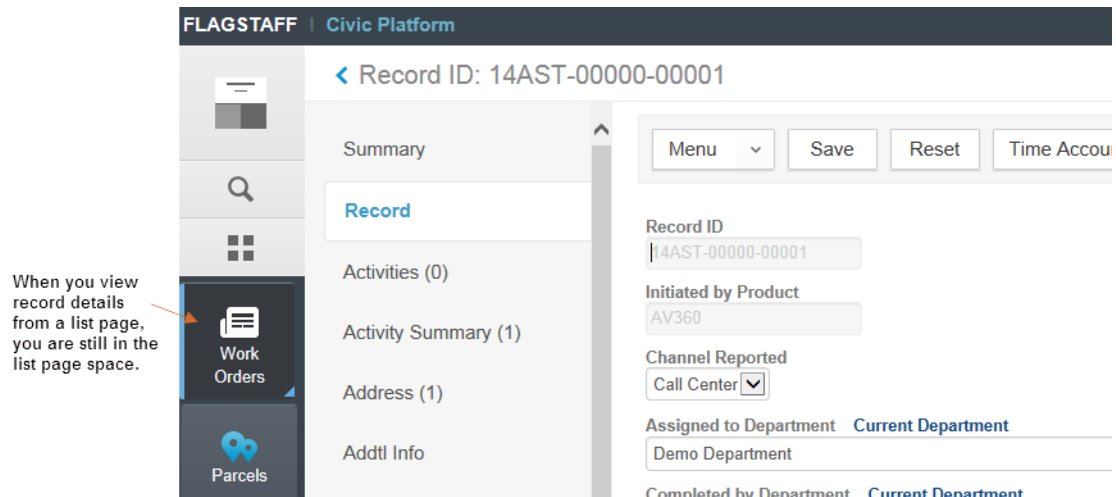
To get back to the list page, use the blue arrow in the top left corner of the space.
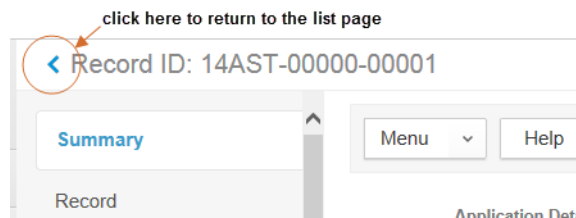
If you want to open a record in a separate space so you can pin it, try this: Note the record number, then use global search to find and open the record in a new space.
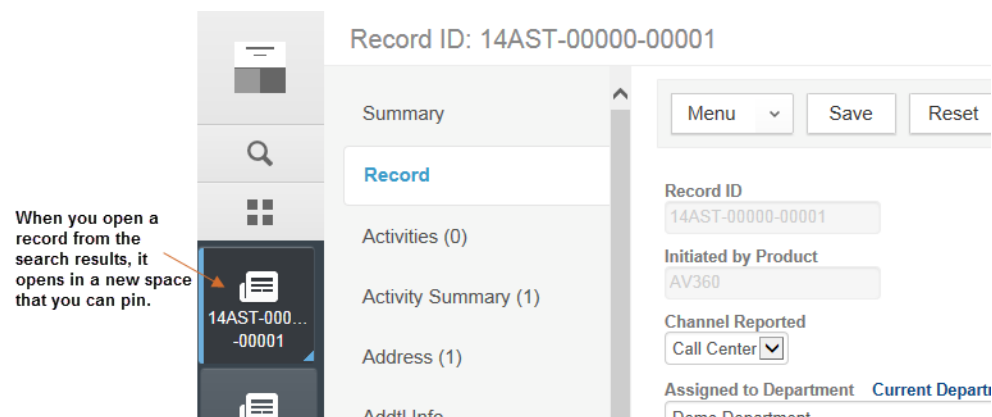
Navigating Panels on the Maps dashboard

When you select multiple objects on the Maps dashboard, a slide-out panel displays on the right, listing the objects you selected, grouped by type. You can select a type to see a detailed list of objects of that type, and you can select an object to see details about that object.

But what if you want to return to the original list of objects by type? What if you want to close the slide-out panel?

Look for the blue arrows!

❮ A left-facing blue arrow in the upper left corner of the panel returns you to a previous view.

❯ A right-facing blue arrow located midway down the panel's left side, closes the panel.

> **CAUTION**   If you close a panel, any objects you had selected, are no
> longer selected.

Figuring Out How to Do Your Job When Everything is Different

We can all empathize with the frustration of dealing with new things. You had a 'system' - an established process, and now, everything is changed. You just want to get your job done, but the environment is different. You don't know where to start or where to go! You really just want to go back to doing things the old way - the way you know.

But what if the old way wasn't the best way? Just because you have done things a certain way for years does not mean that it was the best way to do those things. Our user experience team did a lot of research in their quest to design a new user interface that would not only make your job easier to do, but make the experience a more pleasant one. We invite you to try it out!

We understand that transition can be frustrating, so to alleviate some of your frustration, we are providing you with a reference table that lists a number of common activities you might perform in a typical work day. For each activity listed, we provide you with helpful tips on how to proceed with those activities in the new user interface.

How do I...	How to do it in the new interface
Find a record	• Click the search icon in main menu. • Search and choose record from search results.
Create a new record	• Open launchpad. • Click **+New**.
View my tasks	• Click your agency name to go to the home page.
Find a document/contact/just about anything	• Click the Search icon in Main Menu. • Search and choose record
See a list of <something>	• Open launchpad. • EIther 1) choose a favorite page from the list of favorites, or 2) click All Pages. • Search for the page you want, then select to display.
Open <portlet name>	• Open launchpad. • EIther 1) choose a favorite page from the list of favorites, or 2) click All Pages. • Search for the page you want, then select to display.
Use ad hoc reports	• Open launchpad. • Click All Pages, then search for Ad Hoc Reports. • Select to display.

How do I...	How to do it in the new interface
Where do I change my password?	• Open launchpad. • Click All Pages. • Search for Preference Management. • Select to open in new space.
How do I open the mapping tool?	• Click dashboard toggle. • Choose Map icon.

Getting In, Getting Out, and Getting Around

These topics can save you some time if you aren't one to click around until you figure things out.

Topics

- Logging In and Logging Out

- Changing Your Password

- Switching Between the New Interface and the Previous One

- Accessing the Administration Tools

Logging In and Logging Out

Your agency's name, a valid user name, and a password are all you need to log in to Civic Platform. If you don't have these, see your system administrator. These values are case sensitive, so be sure your Caps Lock key is not engaged.

To log in

1. Using the internet browser of your choice, navigate to the login page for the Civic Platform. This URL is provided to you by your agency.

TIP	Use the **Add this page to your favorites** link below the Login button to for easier access in future work sessions.
	Use the **Remember my information** option to auto-populate everything but your password.

2. Enter your agency name, assigned user name, and password in the designated fields.

3. Click **Login**.

To Log Out

1. Click 🔘 (Settings button) in the upper right-hand corner.

2. Click **Sign Out**.

Switching Between the New Interface and the Previous One

For many upgrading users, the new interface will take some time to get used to. It is also true that you have a job to do and you may not have all day to experiment with the new interface. Accela has you covered! You can switch from the new interface to the Vantage 360 interface and back again, at least for a while!

**To switch to the Vantage 360 interface from the new one**

1. Click ⚙ (Settings button) in the upper right-hand corner.

2. Click **Switch to V360**.

To switch to the NEW interface from the old one
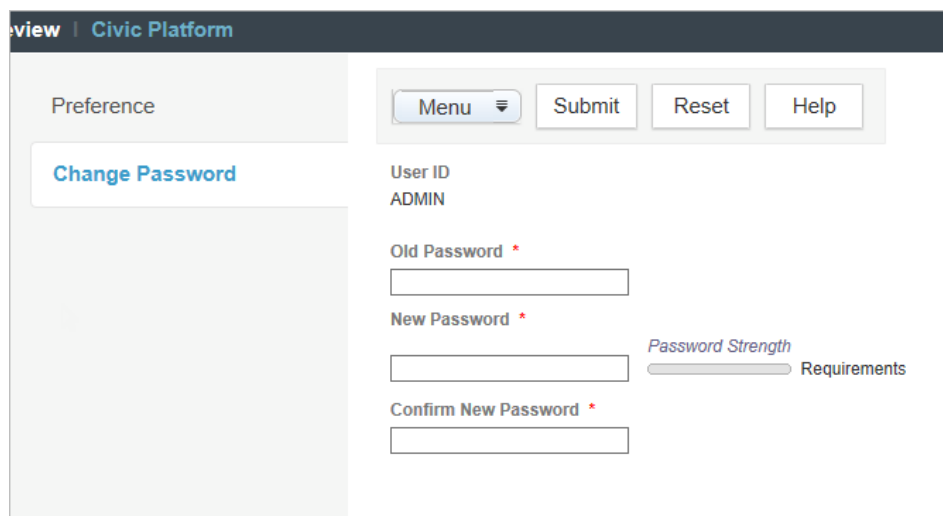
1. Locate and click the **Switch to New UI** link in the upper right-hand corner of the display.

Changing Your Password

1. Click ⊞ to access the launchpad.

2. Click the **All Pages** link to access a list of pages.
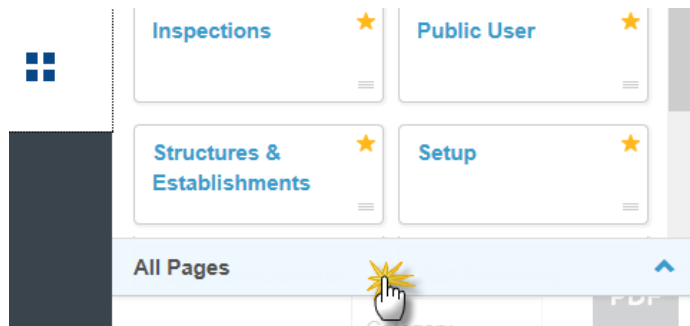
3. In the **Filter list...** box, type **Preference**.

   Your list of pages is filtered to include the Preference Management page link.

4. Click **Preference Management**.

   The Preference Management page displays.

5. Click the **Change Password** link to open the Change Password page.

6. Enter your old password, then the new password.

   If you want to know your agency's password requirements, click the **Requirements** link.

7. Click **Submit**.

Accessing the Administration Tools

Admin level users can access administration tools (V360 Admin and Classic Admin) from the Settings menu. If you don't see the links in the Settings menu, you don't have access.

To access Admin tools

1. Click ⚙ (Settings button) in the upper right-hand corner.

2. Select either **Administration** or **Classic Administration** from the command menu.

Navigating the New User Interface

The new Civic Platform user interface provides a number of navigation options that you can use to find the pages you need so you can do your job. The topics listed below describe these options.

Topics

- Switching Between Dashboards
- Using Search in the New Civic Platform User Interface
- Using the Launchpad
- Working with Spaces
- Interacting with the Task Dashboard
- Interacting with the Map Dashboard

As with anything, the best way to familiarize yourself with the tools at your disposal is to try it out for yourself.

Switching Between Dashboards

The tasks dashboard displays by default when you log in or when you return to the home page. However, a maps dashboard is also available which offers a map-centric view.

A dashboard toggle lets you switch between the two dashboards. This toggle is located at the top of the main menu.

When this icon displays, the task dashboard is the current view.

When this icon displays, the maps dashboard is the current view.

To toggle between dashboards

1. Click the dashboard toggle at the top of the main menu.

2. Choose [ ] for the task dashboard.

   Choose [ ] for the map dashboard.

Using Search in the New Civic Platform User Interface

There are a number of ways to search for data in the new interface.

■ The global search tool in the main menu gives you the ability to locate the information you need. When you search on a word or phrase, the global search engine returns all records that contain the search criteria, regardless of the record type. Search results are sorted by record type, making it easier for you to find what you need. (See Performing a Global Search.)

■ Reference data lookups are available via the launchpad. When you select any of the reference data lookups, you can enter search criteria to locate the reference data you need. (See Performing a Reference Data Lookup.)

■ Individual page search functionality allows you to look for a particular record within the data set supported by the page you are on. (See Performing an Individual Page Search).

Performing a Global Search

Use the global search tool to find a record quickly.

To use global search

1. Click the search button [🔍] in the main menu.

2. Enter search criteria. For example, enter a last name.

3. Press **Enter** (or click **Search**).

    Search results display, with the results grouped by record type.

> **NOTE**   Search results are persistent for the duration of your work
> session. If you navigate to another space (for example, you
> click a record link to view that record), you can always click the
> search button at any point to return to the search results for the
> last search you performed. You can enter new search criteria at
> any time.

4. To exit the search page, click the home page link (agency name) or any other space icon.

Performing a Reference Data Lookup

Reference data is data that is stored in the database as an individual data entity, rather than as part of a transactional record. Reference data can then be pulled from the database and used in multiple transactional records.

Example: You enter a reference address in the database. Someone in your agency creates a new building license application or adds a new work order for the address you entered. That user can look up the address in the reference database and retrieve the complete address from the database, while establishing a link with that address record. At any point in the future, you can open the reference address record and from that record, access/view all work orders, schedules, applications, and other types of activity for that address, thanks to that link.

To look up a reference object

1. Click [::] to access the launchpad.
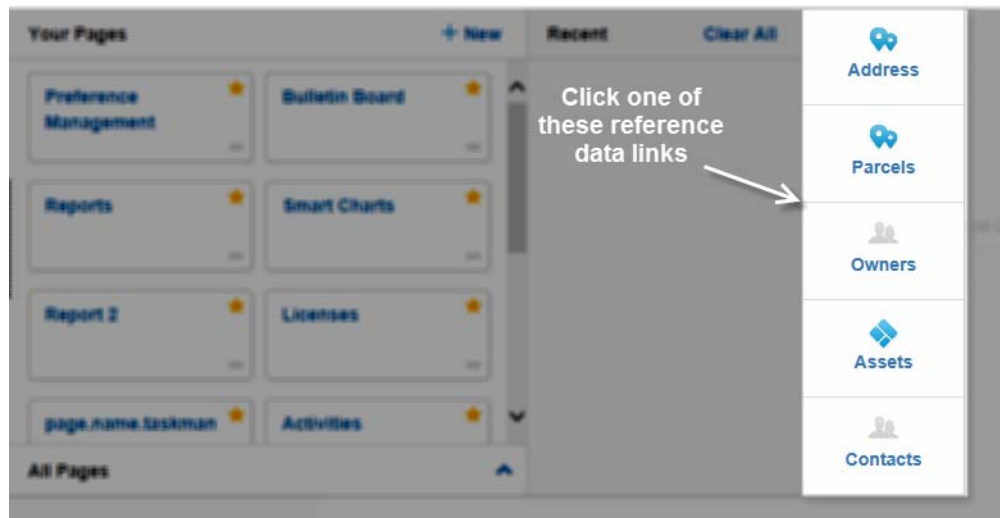
2. Click one of the reference links available on the launchpad.

3. Enter search criteria and press **Enter** (or click **Submit**).

Performing an Individual Page Search

Many Civic Platform pages give you the ability to search for particular records contained within that page. For example, you can open the Inspection page and search for all inspections completed by one individual in the month of April. Or you can open the Work Order page and search for work orders that are overdue and not completed.

If you see a Search button in the toolbar of a page, you can search for records.

To search for records on a page

1. Use the launchpad to open the page you want to work in. If you already have the page pinned to your menu bar, you can click the pinned space icon.

2. Click Search.

3. Enter search criteria and press **Enter** (or click **Submit**).

Using the Launchpad

The launchpad is your one-stop access point for most pages you need to work with. The launchpad has several distinct parts, each of which presents you with a list of hyperlinks you can click to "launch" or access that object.

- About Your Pages
- Finding a Page

- Defining a Page as a Favorite

- Recent Records

- Reference Pages

About Your Pages

The Your Pages area provides you with two alternatives for viewing and accessing page hyperlinks. You can toggle between the views by clicking the All Pages bar, which shifts from top to bottom, depending on which view displays:

- The default view is a list of pages you have marked as 'favorites.'
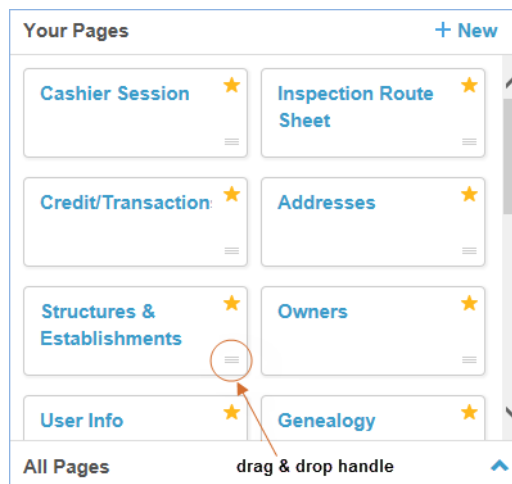
To organize the order in which the favorites display, use the handle ☰ on each favorite to drag and drop it where you want it.

- The alternate view, All Pages, is a list of all the pages that your user profile allows you to access, sorted by functionality.
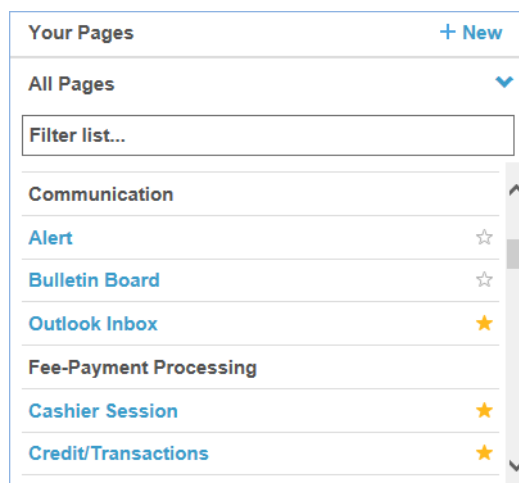
This list cannot be reorganized, but you can filter the list to find what you are looking for.

Finding a Page

You can scroll up and down the page views to find a page link, or you can apply a filter to locate a page quickly in the All Pages view.

To find a page by applying a filter

1. Click [launchpad icon] to access the launchpad.

2. Click **All Pages** at the bottom of the Your Pages section.

   The display changes to a list of all accessible pages, sorted by functionality.

3. Enter the page name you want in the **Filter list...** box.

   As you enter each letter, the list of pages below the box adjusts to display those pages that match in full or in part what you are typing.

   *In the example below, entering **co** displays a number of pages with "co" in their titles. Adding an additional **n** makes a big difference.*
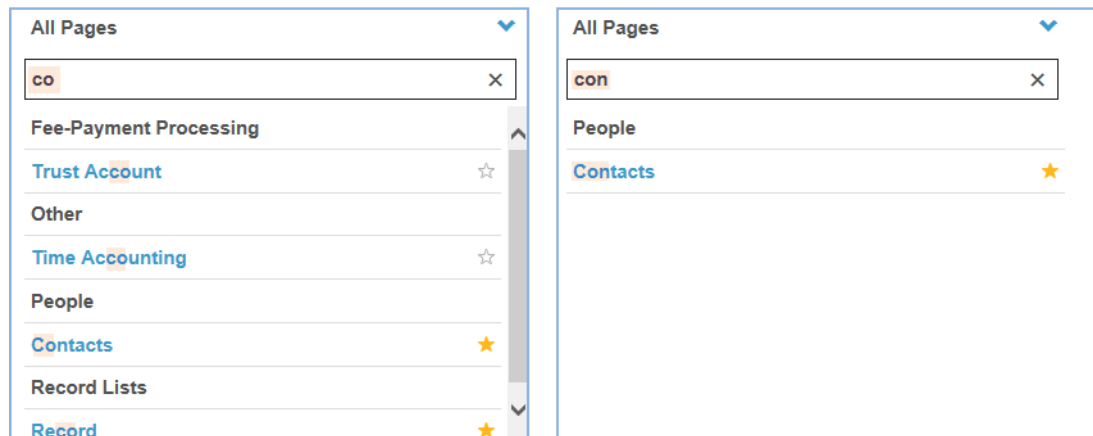

Defining a Page as a Favorite

The ability to mark pages as favorites enables you to set up the launchpad to suit your individual work requirements. The pages you mark as favorites are the first ones displayed whenever you open the launchpad. You can have as many favorite pages as you want, but remember: too many favorites may defeat the purpose. If you have too many favorites in your list, you can easily remove them the same way you added them.

To mark or unmark a page as a favorite

1. Click [launchpad icon] to access the launchpad.

2. Click **All Pages** at the bottom of the Your Pages section.

   The display changes to a list of all accessible pages, sorted by functionality.

   ⭐ *A gold star means a page is currently marked as a favorite.*

   ☆ *A white star means a page is not marked as a favorite.*

3. Locate the page you want to mark or unmark as a favorite.

4. Click the star.

   The star color changes color (yellow to white, or white to yellow)

5. Click **All Pages** at the top of the Your Pages section to return to the Favorites list.

6. If you created a new favorite, you can use the handle ☰ on the new favorite to drag and drop it where you want it to appear.

Accessing Recent Records

The launchpad provides you with a list of recently visited applications and records. Records display in the order of when they were last accessed, most recent first.

You can click any record in the list to launch it in a new space.

If the recently visited list gets too long, you can clear the list. Be aware that, when you clear the list, the action is permanent.

> **TIP**   You don't need to rely on the list of recent records to access ongoing work. Open any record in a new space that you work with a lot, then pin that record to the spaces menu. It will remain pinned there until you unpin it. To access the record, click the pinned space in the menu

Accessing Reference Pages

The launchpad makes access to reference data easy. On the right edge of the launchpad is a series of links that enable you to look up reference data when you need it.
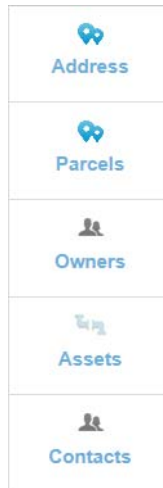
Click a link to display a lookup form where you can define the search criteria needed to locate the reference data you want to see.

Related Links

■ Performing a Reference Data Lookup

Working with Spaces

The spaces menu on the main menu gives you one-click access to any page you have open.

■ Viewing More Spaces

■ Pinning, Unpinning, and Closing Spaces

Viewing More Spaces

A total of 6 spaces display in the spaces menu at any one time, with the most recently opened space at the top.

If you have more than 6 spaces open (up to a maximum of 20), you can access them by clicking the **More** link at the bottom of the spaces menu.
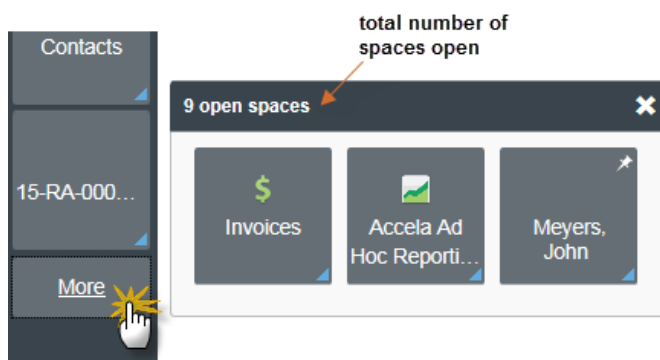
The 'more spaces' panel displays the spaces that don't fit on the menu. It also keeps a running count of the number of spaces you have open.

Pinning, Unpinning, and Closing Spaces

If you have certain pages you work with a lot, or if you have a record that you are having to return to frequently, you can open the record or page in a space and pin it to the spaces menu. Pinned spaced stay put until you unpin them.

> **NOTE**   Just because you pin a space does not mean that it will not be demoted down the spaces menu if you open other spaces.

To pin, unpin, or close a space

1. Click the Space Options button on the space you want to work with.

2. Select the action you want to perform from the menu of options: **Pin**, **Unpin**, or **Close**.

   If you pinned the space, a thumbtack image appears in the upper right-hand corner, which is your visual flag that this is a pinned space.

   If you unpinned the space, the thumbtack image disappears and the space can be closed.

   If you closed the space, it is removed from the spaces menu.

Interacting with the Task Dashboard

The tasks dashboard is your to-do list, calendar, and work tracking venue. It is also your home page, so it is always accessible (see Getting there).

You can interact with your tasks in both the card view and the list view. Each view has distinct benefits, and many users like to switch between views to take advantage of functionality that is unique to one view or the other.

The following sections discuss in more detail how you can use both views to work efficiently and effectively.

- Using the Task List
- Getting the Most from Your Task Cards

Using the Task List

The task list view gives you the ability to view many tasks at once in a table format. This can be very useful when you want to compare like values for differing tasks.

For example, you can quickly compare due dates of assignments in your queue, as shown in the image below.

COMPARING DATA IN LIST VIEW

If you have tasks with conditions, you can click the condition icons in the list view for more information, just as you would in the task card view. See Getting More Information About Conditions, Holds, Notices, and Locks.

By default only six tasks display when you first open the task list view. You can use the **Load More...** link at the bottom of the page to expand the task list in increments of six.

You can perform actions on one task or select multiple tasks and perform a batch action on them. The list of actions available for you to perform varies, depending on the type and quantity of tasks you want to perform an action upon.

For example, if you select a single document review task and click Actions ⌄, the available actions you can perform on a document review task display.
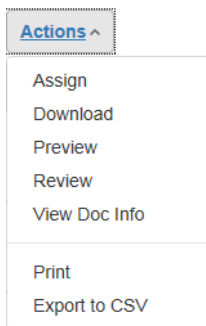
If you select more than one task and then click **Actions**, the available actions include only those that you can apply to ALL selected tasks.

Actions ∧

Print
Export to CSV
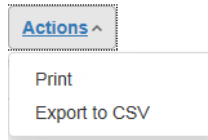
Getting the Most from Your Task Cards

Task cards provide a nice visual for browsing, but more importantly, they also provide a significant amount of relevant information and functionality that can help you plan your course of action to address your task.
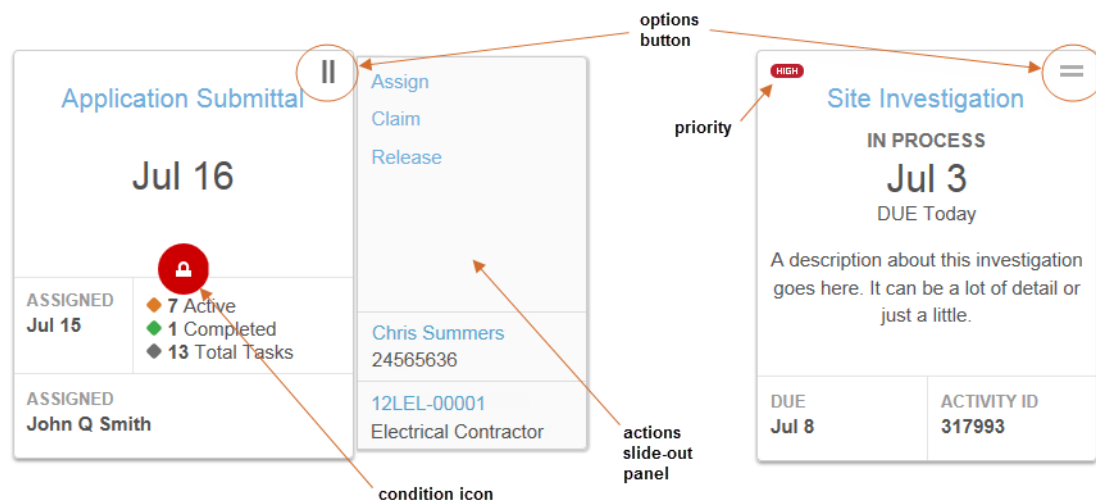
Topics

- Details You Can Glean from a Task Card
- Things You Can Do on a Task Card
- Getting More Information About Conditions, Holds, Notices, and Locks

Details You Can Glean from a Task Card

- **Priority**. Some tasks have a priority flag. Find it in the upper left-hand corner.

- **Conditions, Holds, Notices, and Locks**. The image above shows a lock condition on the document review task. Click any condition icon to view details about the condition.

- **Times/dates**. Most tasks have a scheduled time/date, a due date, or other relevant date (such as the date of the last status change). This information displays in different locations on the card, depending on what type of task it is. See Looking at Task Card Examples to learn more.

- **Status**. Some task types display the task status prominently on the task card. The document review task above shows the status along with the date that the status last changed. The activity task above shows the status immediately below the task card title.

- **Other Details**. Task-centric details can tell you something about how you should interact with that task. Different task types offer different details.

Things You Can Do on a Task Card

- You can open the task details in a new space (or a slide-out, depending on the type of task) by clicking the task name hyperlink.

> **NOTE** If the task name displays in black text, you do not have permission to view the task details.

- You can perform actions via the action slide-out. Which actions you can perform varies by task type.
- You can access the record from which the task originated by clicking the record ID hyperlink.
- You can access the primary contact details by clicking the primary contact hyperlink.
- You can preview documents (doc review tasks only).

Getting More Information About Conditions, Holds, Notices, and Locks

When conditions, holds, notices, or locks are applicable to a task or to the record from which a task originates, you see one of these icons displayed prominently in the center of the task card.

indicates 'required' task (workflow tasks only).

indicates a lock condition (severity 1) is in place.

indicates a hold status (severity 2) is in place.

indicates a notice (special instruction) (severity 3) is available.

When you see one of these icons, you can click it to learn more about the reason it is in place.
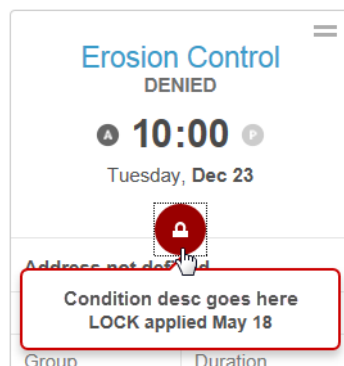
If you need more information, expand the task action slide-out and click the record ID link to open the record in a new space.

The notice displays at the top of the page, but in more detail.
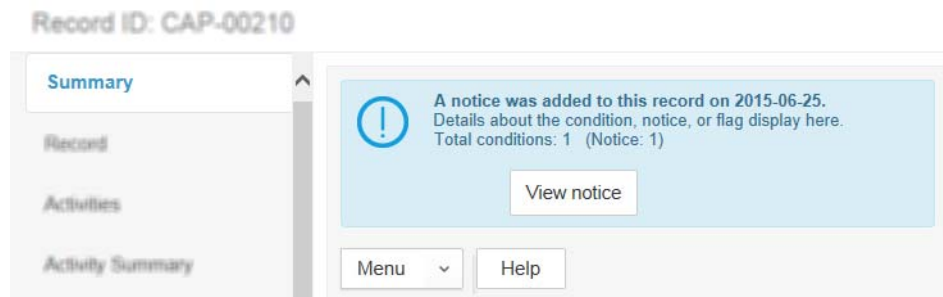
If you need even more detail than this, click **View notice** to open the condition details in a new window.

Looking at Task Card Examples

Task cards provide you with a number of useful details at a glance. They also provide you with one-click access to the record of origin. See the examples below to learn more about what data displays in the task cards.

- Inspection Task Card

- Document Review Task Card

- Activity Task Card
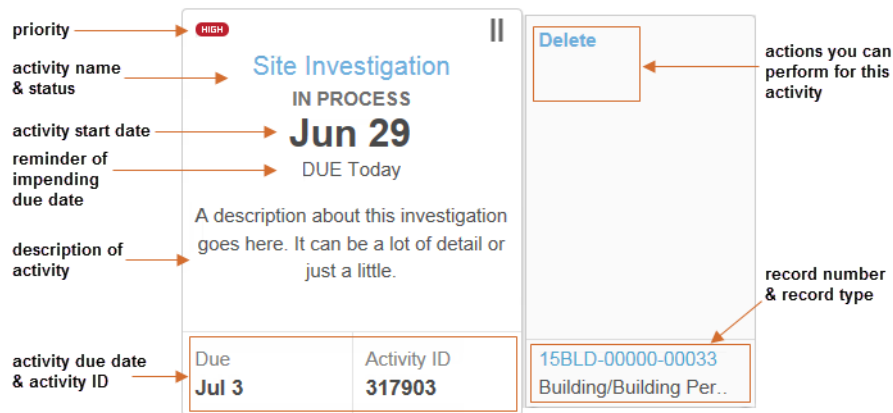
- Workflow Task Card

- Meeting Task Card

Inspection Task Card

Document Review Task Card

task name → **SampleFloorPlan.pdf**

task comments → Page #: 3; Comments: please review before site visit.

preview document →

review status → In Review
Apr 27

document category → Category
Site Plan

PDF

Assign
Download
Preview
Review
View Doc Info

← actions you can perform for this document

record number & record type →

15CAP-00000015
Building/000PHP/Te...

Activity Task Card

priority → HIGH

activity name & status → **Site Investigation**
IN PROCESS

activity start date → **Jun 29**

reminder of impending due date → DUE Today

description of activity → A description about this investigation goes here. It can be a lot of detail or just a little.

activity due date & activity ID → Due
Jul 3

Activity ID
317903

Delete

← actions you can perform for this activity

record number & record type →

15BLD-00000-00033
Building/Building Per...

Workflow Task Card

workflow task title → **Environmental Review**

task due date → **Jul 3**
DUE Today

click the condition icon to view details →

date that the task was assigned → ASSIGNED
Jul 2

person responsible for task completion → ASSIGNED
John Q Smith

Assign
Claim
Release

← actions you can perform for this workflow task

◆ **5** Active
◆ **0** Completed
◆ **13** Total Tasks

workflow tree status →

Demo User
Applicant

← primary contact

000000000000265
Building/nancy/nancy...

record number & record type →

Meeting Task Card

meeting title → CPC Meeting

meeting duration → 1 HR

06:00 PM
meeting time and date → Tuesday, May 12

Reject ← actions you can perform for this meeting

meeting location → City Hall Room 400

Board of Appeals	John Q Smith Building Dept

meeting body & responsible party →

Interacting with the Map Dashboard

Use the Maps dashboard to find locations and visually interact with objects such as parcels, permits, inspections, plans, assets, work orders, and service requests.

Related Topics

- Locating Places
- Working with Map Layers
- Moving Around and Selecting Objects
- Creating and Editing Map Features
- Redlining and Annotating a Map
- Integrating with Civic Platform Data
- Printing a Map

Locating Places

- Finding an Address or Place
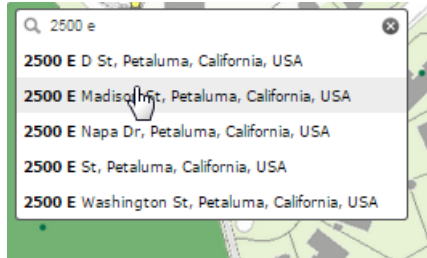- Navigating to a Bookmarked or Browser Location

Finding an Address or Place

You can use the Finder box to locate an address or place.

To find an address or place

1. Begin typing the address in the finder box.

    As you type in the address or place name, a dynamic list of possible matches displays. The list changes as you type.

2. Either select an item from the list or finish typing the complete address and press **Enter**.

    Civic Platform GIS zooms to the selected location.

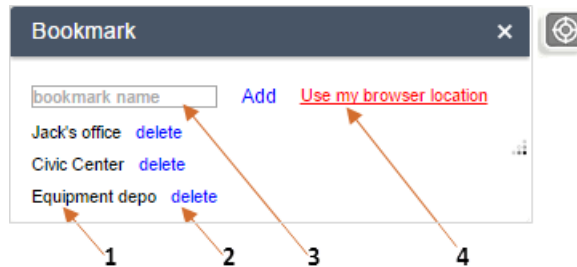 | TIP | Click **X** to clear the Finder and start another search. |
    |---|---|

Navigating to a Bookmarked or Browser Location

You can bookmark locations for future use. A Locate Me panel stores your bookmarked locations and even presents you with the ability to use your browser location.

To work with bookmarks

1. Click the **Bookmark** icon .

    *A **Locate Me** panel displays.*

2. Do any of the following:

    1: Go to a bookmarked location.
    2: Delete a bookmark.
    3: Bookmark the current location.
    4: Navigate and zoom into your browser's current location.

Working with Map Layers

A map view consists of multiple layers from a map service or a mash-up of multiple map service providers. For example, a single map view can have separate layers for geographic features, city streets, hydrants, street lights, parcels, and others.

Use the Layers panel to manage the visibility of map layers.

To open the Layers panel

1. Click the Layers icon [icon].

   The Layers panel displays.
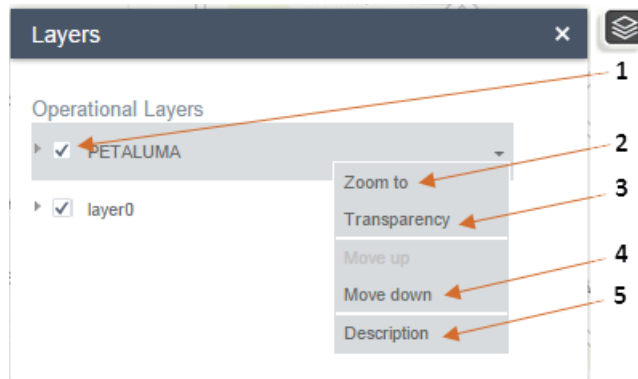
2. Do any of the following:

   1: Show or hide map services or map layers.
   2: Zoom to the selected map layer.
   3: Adjust the transparency of the selected map layer.
   4: Rearrange the stacked position of the selected map layer.
   5: See the GIS data description provided by the map service.

Moving Around and Selecting Objects

You can use your mouse to

- Pan left, right, up, and down by clicking and dragging the view.

- Zoom in and out on the view by spinning the scroll wheel.

- Select and act on one or more objects by pointing and clicking, or by drawing boundaries to define an area.

Topics

- Selecting a Single Object
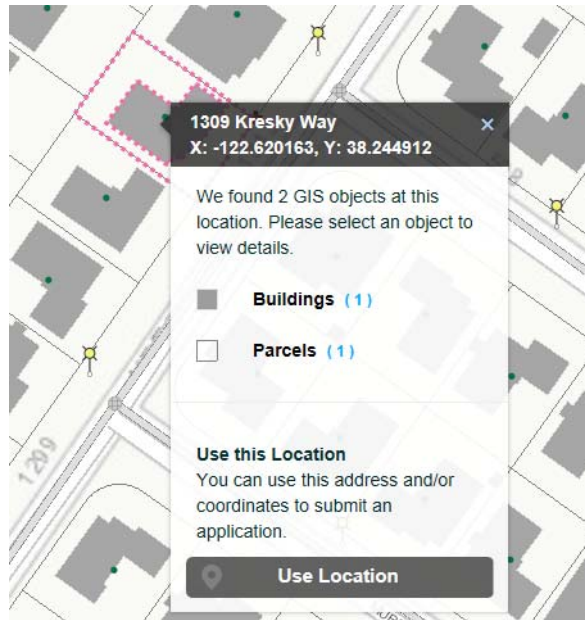- Selecting Multiple Objects

Selecting a Single Object

To select a single object from the default map view

1. Navigate the map to find the location that you want.

2. Click the location or object you want.

   A pink dotted border displays around the selected object. If there is more than one object (for example, a building and a parcel), an information panel displays, listing the objects.

INFORMATION PANEL

3. Choose the object you want to work with.

   The information panel displays a list of actions you can perform for the object.
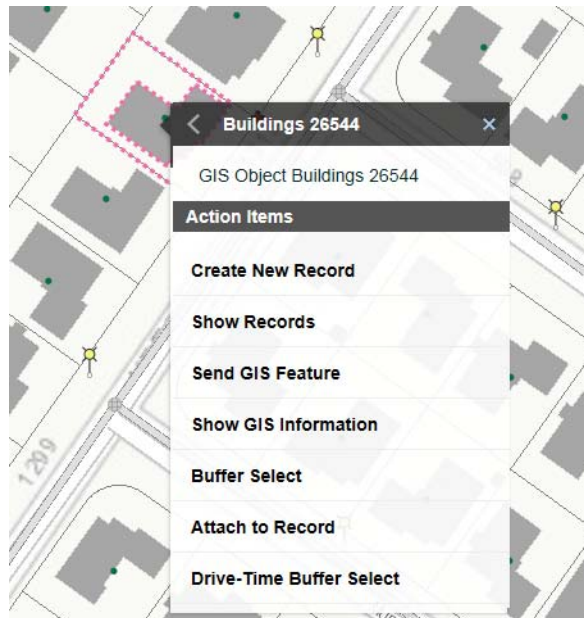
To select a single object using layers

1. Navigate the map to find the location that you want.

2. Click the Layers icon and choose the layers containing the objects you want to select. For example, you can display the Hydrant layer and the Waterlines layer.
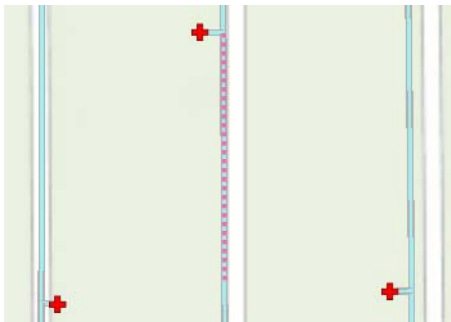
3. Click an object.

   A reddish dotted line means it is selected. An information panel also displays when you select an object (see Information Panel for an example). It is your conduit to information about the object, as well as to a list of actions you can perform.

   SELECTED FIRE HYDRANT

   SELECTED WATER LINE

Selecting Multiple Objects

There are several ways to select multiple objects.

- Use the Shift Key
- Use the MultiSelect Tool
- Use a Distance Buffer
- Use a Drive-Time Buffer

Use the Shift Key

You can press and hold the **Shift** key while you click on multiple map locations.

This technique is useful when you want to select non-contiguous parcels as shown below. Notice that a slide-out panel that lists all the objects found at the selected locations.
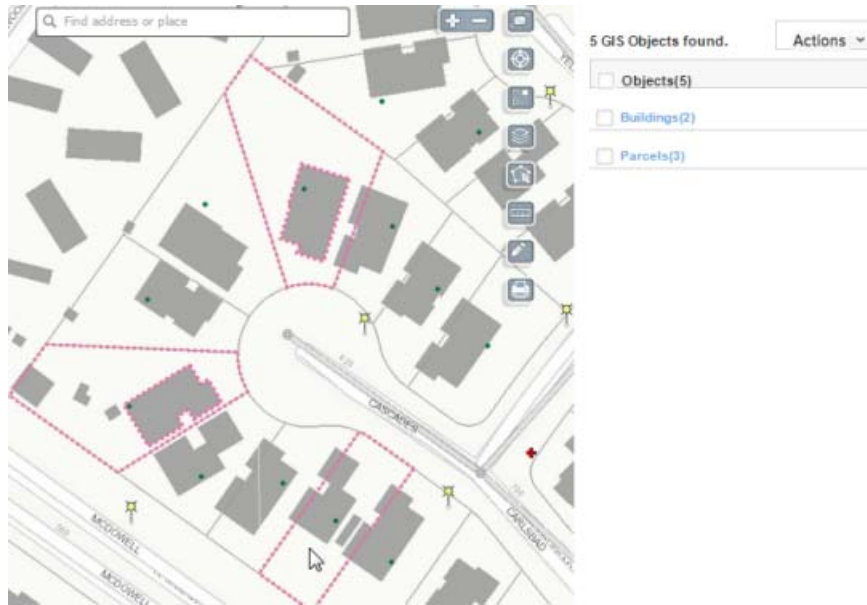
Use the MultiSelect Tool

You can use the MultiSelect tool to select multiple features within a defined area.

1. Click the MultiSelect icon 🏠.

2. Draw an area by clicking multiple points on the map. Double-click the last point to complete the drawing, as shown.

The selected area is shaded and a slide-out panel displays, listing the multiple GIS object layers in the selected area:
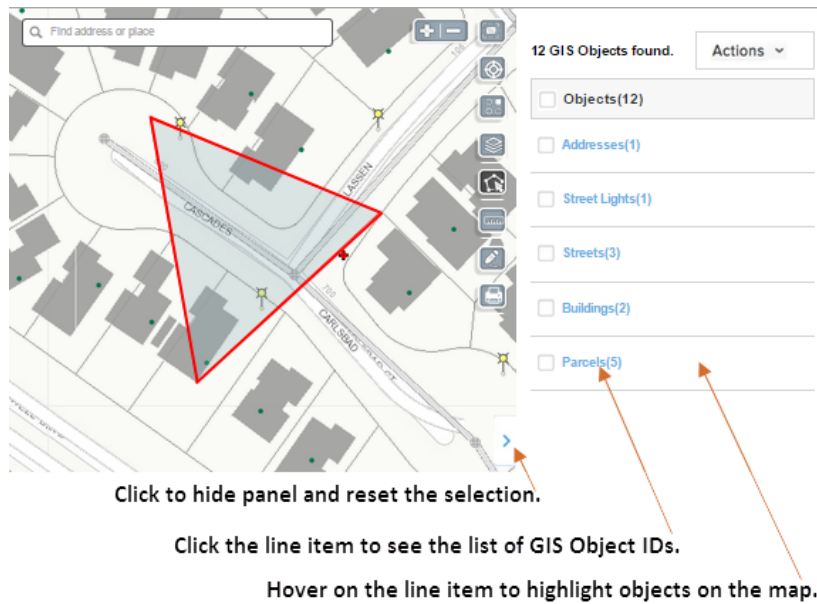
3. Click any layer name to see a list of the objects for that layer contained in the region you selected.

Civic Platform highlights the objects on the map.

4. Try moving your mouse over each object ID in the panel. As you move your mouse, watch the map to see each object highlighted in turn as you pass over it.

You can click an object ID to see its attributes. You can also select one or more objects and choose an action from the Actio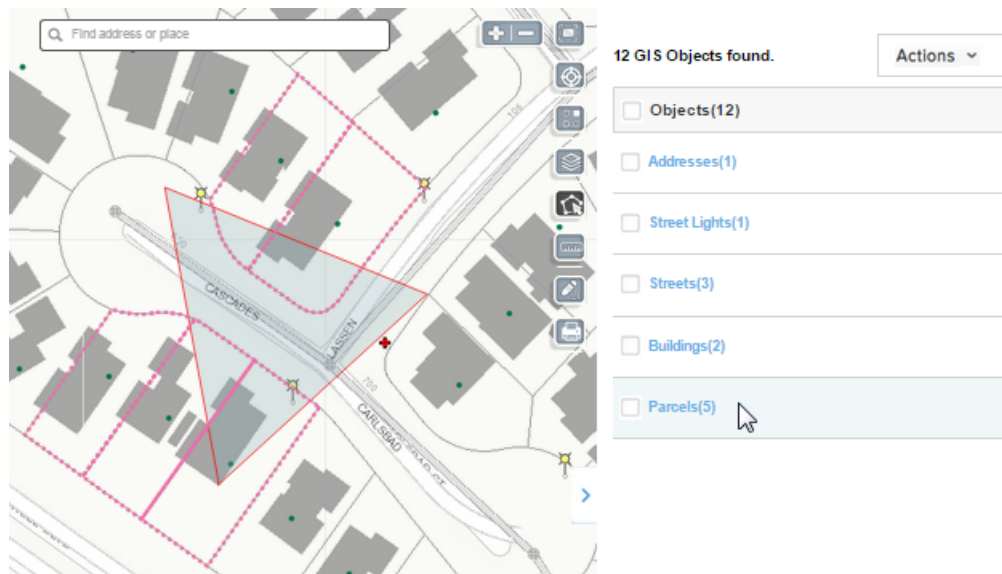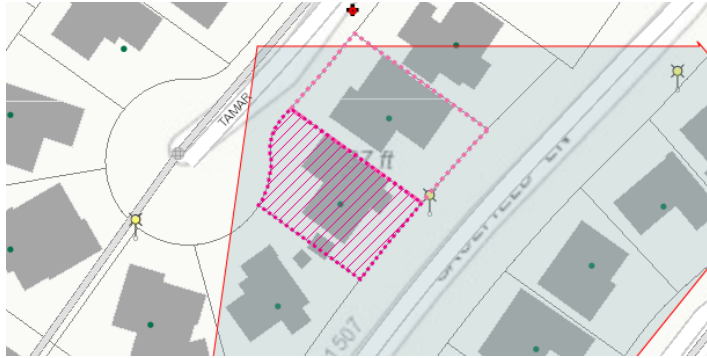n command menu. See "Civic Platform GIS User Topics" in the *Civic Platform 8.0 Release Notes and Addendum* for more information about actions you can perform.

Use a Distance Buffer

A distance buffer allows you to define an area around a selected point, line, or polygon feature so that all GIS objects located within the defined area are automatically selected.

For example, if you want to send a notification to the property owners that live within 300 feet of a certain parcel, click on that parcel and then define a distance buffer to automatically select all parcels within a 300 feet radius.

1. Navigate to the location of the object you want and click.

   A list of object layers at that location displays.

2. Select the layer you want, then select the object that you want to use as the center point of your distance buffer.

   An Action menu displays.

3. Choose **Buffer Select**.

4. Provide the following information:

Map Service	If more than one map service is configured, you can choose the map service you want. Otherwise, the default service displays.
Map Layer	Choose the map layer containing the objects you want to include in the distance buffer. The map layer for the object you selected is the default value.
Distance	Enter a distance and define the unit of measure. This is the size (radius) of your buffer.

5. Click **OK**.

   The buffer displays on the map, and a slide-out panel displays, listing the GIS objects for the layer you specified that fall within the defined region.

150 foot buffer
around a streetlight

Use a Drive-Time Buffer

You can define a drive-time buffer. This is an area that you define based on the travel time from a center point.

1. Navigate to the location of the object you want and click.

   A list of object layers at that location displays.

2. Select the layer you want, then select the object that you want to use as the center point of your distance buffer.

   An Action menu displays.

3. Choose **Drive-Time Buffer Select**.

4. Provide the following information:

Map Service	If more than one map service is configured, you can choose the map service you want. Otherwise, the default service displays.
Map Layer	Choose the map layer containing the objects you want to include in the drive time buffer. The map layer for the object you selected is the default value.
Distance	Enter a number of driving minutes from the center point you chose. Driving time is calculated by the map service based on speed limit and street network.

5. Click **OK**.

   The buffer displays on the map, and a slide-out panel displays, listing the GIS objects for the layer you specified that fall within the defined region.

Creating and Editing Map Features

You can create new map features or modify existing ones. For example, if a public works maintenance worker installs a sign above a traffic light, you can add a map feature to represent the sign at its exact location.

NOTE	The map feature editing capability is available only if an ESRI feature service has been configured at your agency.
	Only users with sufficient profile permissions may create or edit map features on Civic Platform GIS. See your administrator for more information.

To edit an existing map feature

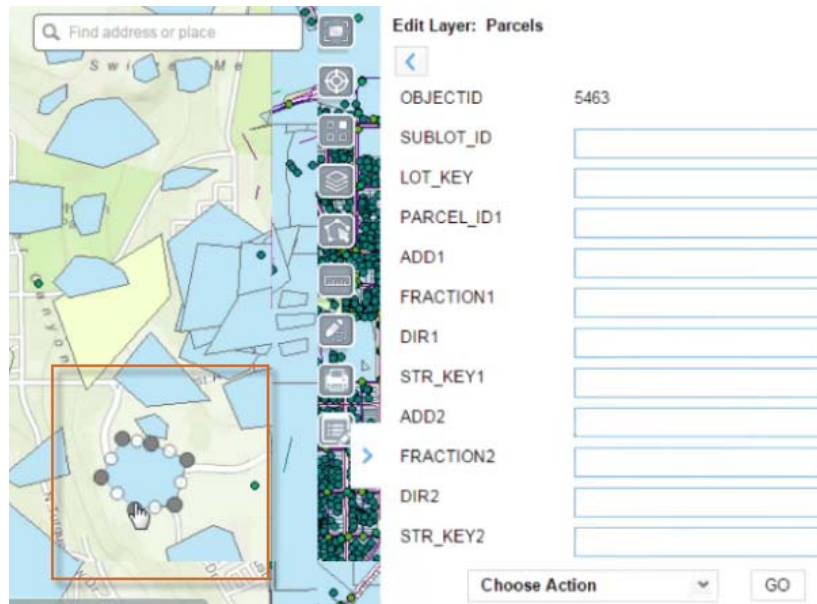1. Click the **Edit Layers** icon .

    The Edit Layers panel displays.

2. Select the layer you want to edit.
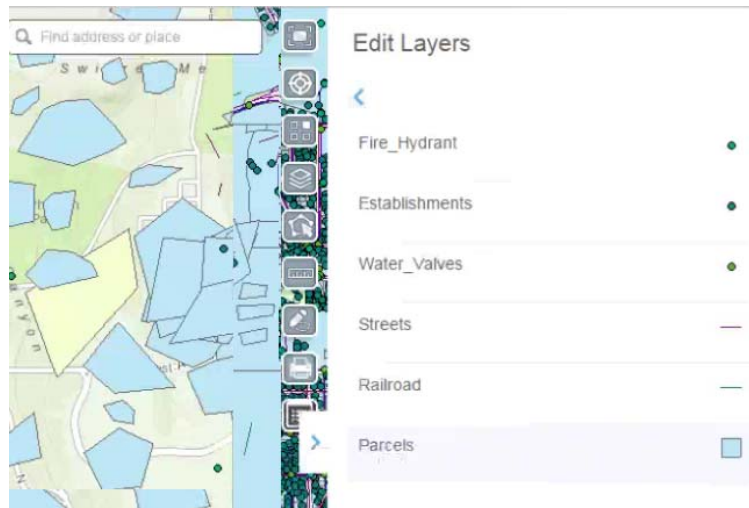
3. Locate and select the map feature you want to edit.

   Anchors appear on the vertices of the map feature.

4. Click and drag the vertices to modify the shape. You can also enter or modify the object's GIS attributes as shown on the panel.
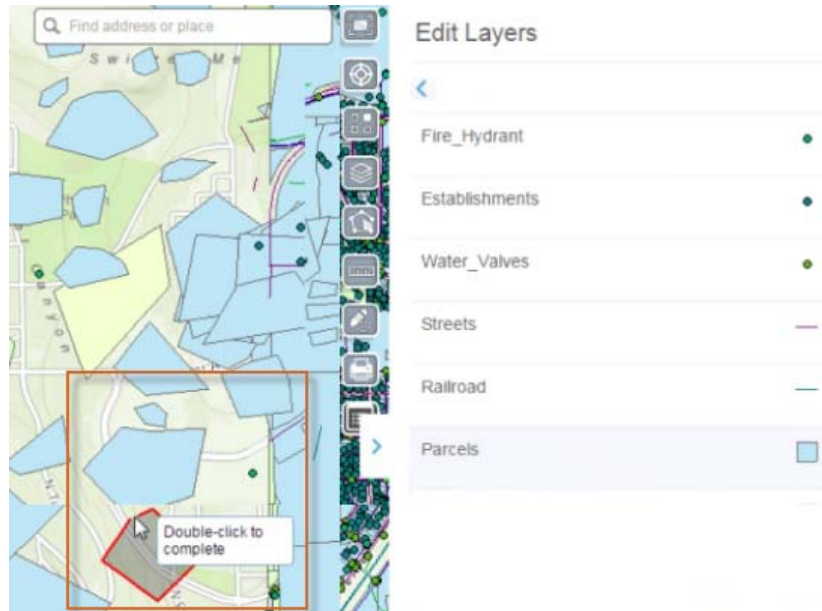
   As you draw the feature, the lines auto-snap to nearby features.

5. Click **Go** to complete your modifications.

To create a new map feature on the selected layer

1. Click the **Edit Layers** icon .

   The Edit Layers panel displays.

2. Select the layer you want to edit.

3. Click points on the map to sketch the shape of the map feature. Double-click to complete the sketch.

4. Click **Choose Actions** to select an action to apply to your new map feature.

|	
Create New Record	Select this option to add the map feature to the GIS database, and open the Civic Platform intake form so that you can create a new Civic Platform record using the new GIS object.
Create Geometry Only	Select this option to add the map feature to the GIS database only.
Attach to Record	Select this option to add the map feature to the GIS database, and attach it to an existing Civic Platform record.

Redlining and Annotating a Map

You can annotate your map view with shapes and text labels.

To annotate a map
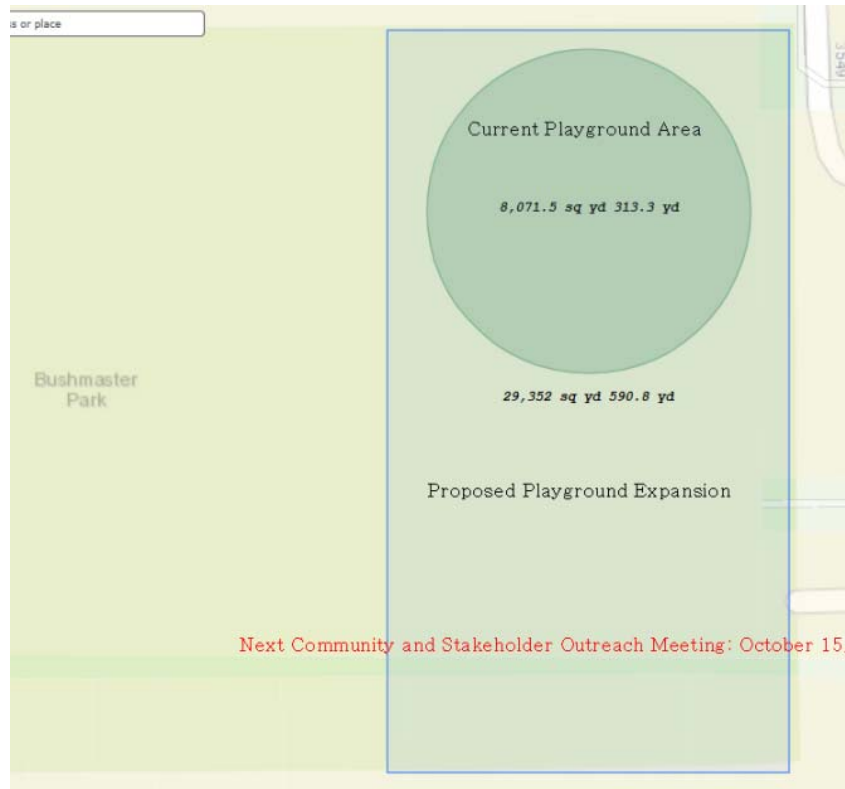
1. Click the **Draw** icon .

   The Draw panel displays.
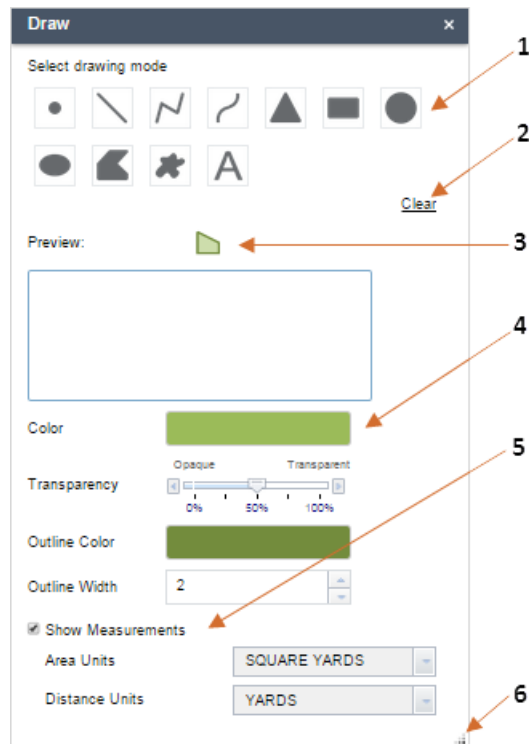
2. Do any of the following:

1: Select a drawing tool, either a point, line, shape, or text label. Click and drag your mouse on the map to draw the shape.For a text label, select the Text icon, enter text on the **Text** field, then point-and-click where you want to place the text label.

2: Clear any drawing or text label on the map.

3: See a preview of the shape or text label.

4: Choose color, transparency, and outline attributes. For a text label, you can choose the font color and text size.

5: For line or shape drawing tools, show measurements and choose the units.

6: Expand or adjust the size of the Draw panel.

3. Use the **Print** widget to export your annotated map into a PDF or JPG file, then send the annotated image to the printer or attach it to a record or notification letter.

The following image is an example of how you can use annotation on GIS.

- *To draw a combination of annotation shapes and labels, work with one annotation at a time. For example, first select a shape tool, adjust its attributes, then draw the shape on the map. If you need to make a change, click **Clear** and redo the shape. After you are satisfied with the shape and need a text label, click the text tool.*

- *To estimate the placement of a text label, the point on which you click is the center of the text label.*

- *Remember to select a drawing tool before drawing on the map. You cannot draw on the map unless you have clicked a drawing tool on the **Draw** panel.*

CAUTION   *The drawing tool offers basic, temporary annotation capabilities. It currently does not allow you to undo or update an existing annotation. If you click **Clear**, all current annotations clear.*


Integrating with Civic Platform Data

Topics

- Showing Records from a Map
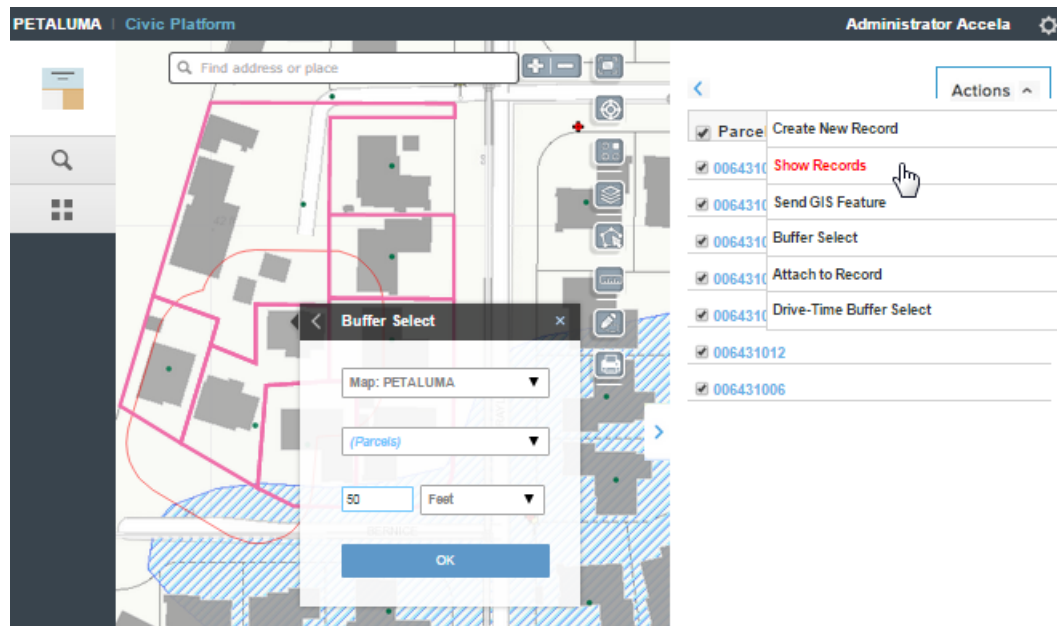- Creating a New Record from a Map

Showing Records from a Map

From the Map dashboard, you can see and analyze Civic Platform records within the context of their geographic locations. When you select one or more map locations, the **Show Records** option is available either on the context menu or on the **Actions** menu on the slide-out panel. The **Show Records** option displays all record associated with the selected GIS feature, and also provides links to related transaction details.

The following diagram shows a sample record and related transaction detail associated with a selected parcel on the map. You can click a record link to see details on a record intake form.
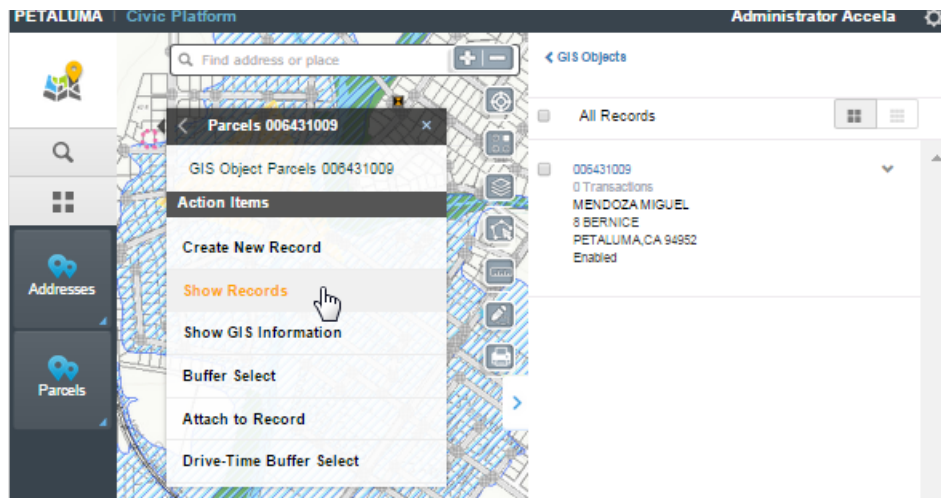
The following diagram shows a map with multiple selected locations (using a distance buffer selection) and the **Actions** menu with the **Show Records** option:

The following diagram shows the records and transactions associated with the selected GIS objects on the slide-out panel:
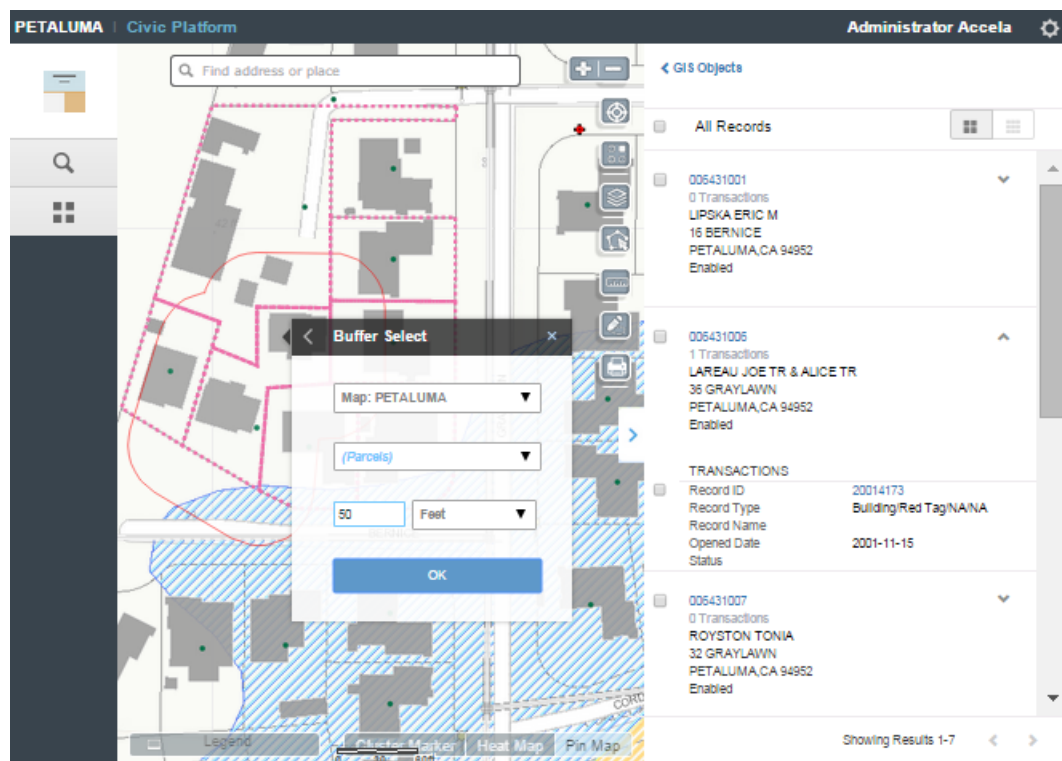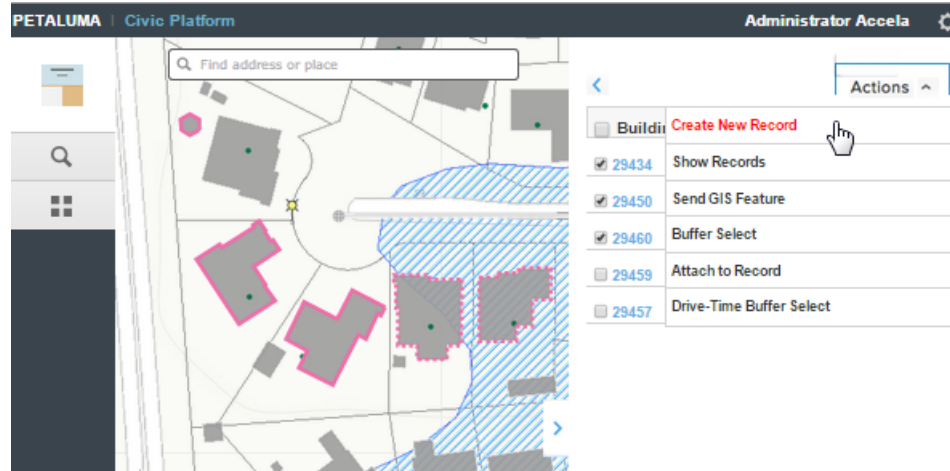

Creating a New Record from a Map

From the Maps dashboard, you can create records and associate them with selected GIS objects.

You can create a record for a single GIS feature, or create records for multiple selections.

■ If you select a single map feature, create a new record by choosing **Create New Record** from the object's context menu.

■ If you select multiple map features, select the GIS objects you want from the list on the slide-out panel, then choose **Create New Record** from the **Actions** menu.

NOTE	The same Civic Platform user group permissions apply when creating a record from a map. For example, if you can create work orders and service requests in Civic Platform, you can also create them from a map.

Printing a Map

When you print a map, you are actually exporting the map view to a selected format (such as PDF). Once exported, you can then print the map image on a printer to get a physical copy.

To print a map

1. Click the **Print** icon ⬚ .

2. Define print options as needed:

Map Title	The title that appears at the top of the page.
Layout	The page size and orientation.
Format	The file format to export to. Options include: PDF, EPS, JPG, PNG 8-bit, PNG 32-bit, SVG, and SVGZ (compressed).
Advanced > Map scale/ extent	This is the scale/extent you want to use. Options include current **map scale**, default **map extent**, and **forced scale**. Adjust settings as needed.
Advanced > Layout metadata	The **Author** and **Copyright** information, along with an option to display the map legend.
Advanced > MAP_ONLY size	The dimensions (width and height in pixels) of the map.
Advanced > Print quality	The print resolution you want to use, defined in DPI (dots per inch).