Wisconsin Department of Transportation

Development of the Access Determination GIS Application (ADGIS)

Needs Assessment

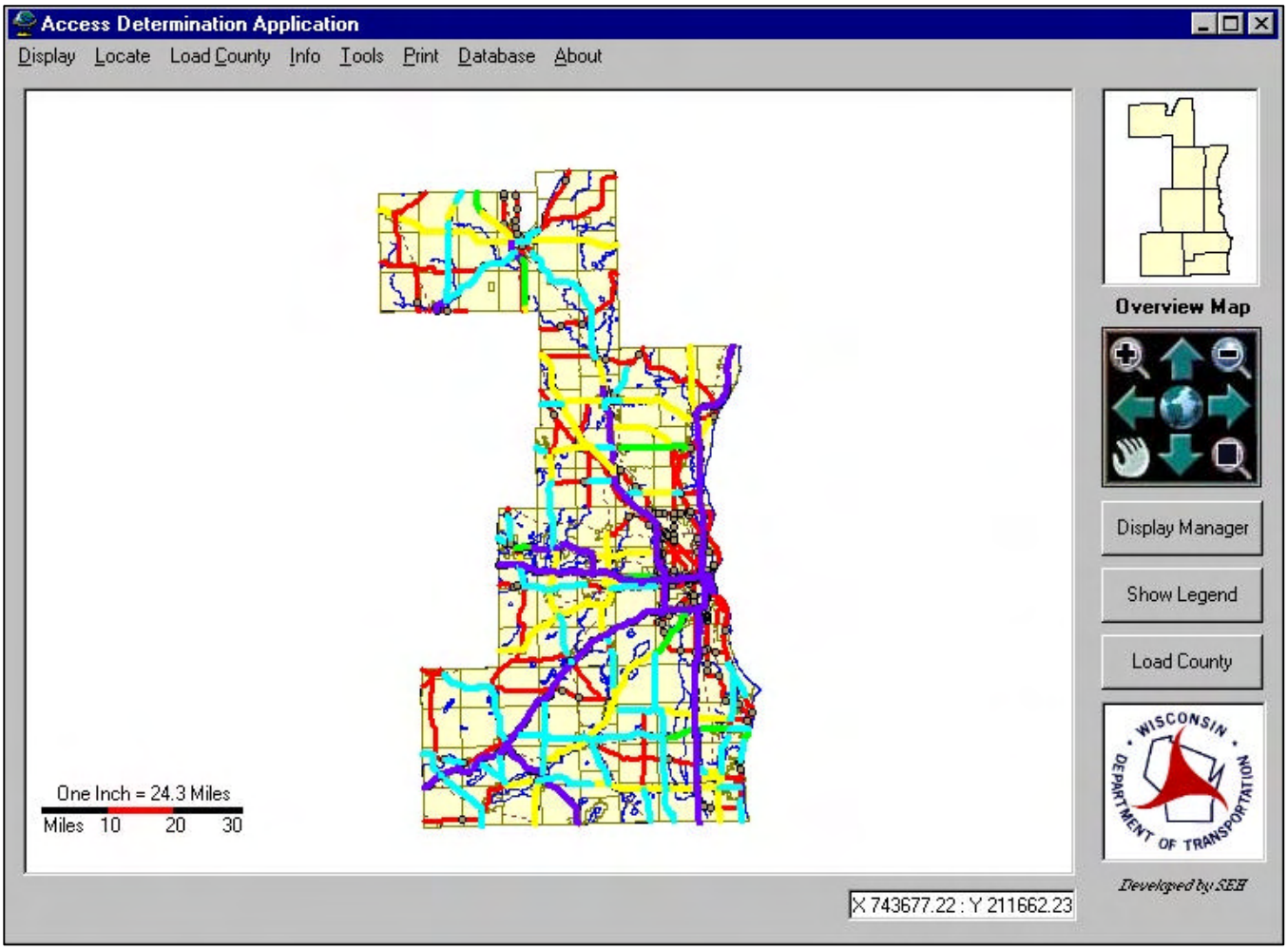
Design of Database and GIS Applications

Pilot Study

Implementation

ACCESS DETERMINATION APPLICATION GEOGRAPHIC INFORMATION SYSTEM (ADGIS)

USER MANUAL



ACCESS DETERMINATION APPLICATION GEOGRAPHIC INFORMATION SYSTEM (ADGIS)

August 2002

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Introduction

Welcom to ADGIS, a geographical information system which allows users to geographically search for information regarding access for specific locations or areas. ADGIS was developed with ESRI's Map Objects component software and Microsoft Visual Basic. ADGIS works with the Access Determination Tracking System Application created for tracking the process of access determination requests. ADGIS in its current state is an executable file located on the individual's hard drive. It is anticipated that the general users of ADGIS will eventually be logging into an Intranet application and use a browser to communicate to the system.

System Installation & Setting Environmental Variables

The application data files and information needs to be in a location where they will be stored and maintained, on a network drive. Remember this location because it will be needed when you set the variables in the .ini files that are located on the hard drive of the user with the executable program.

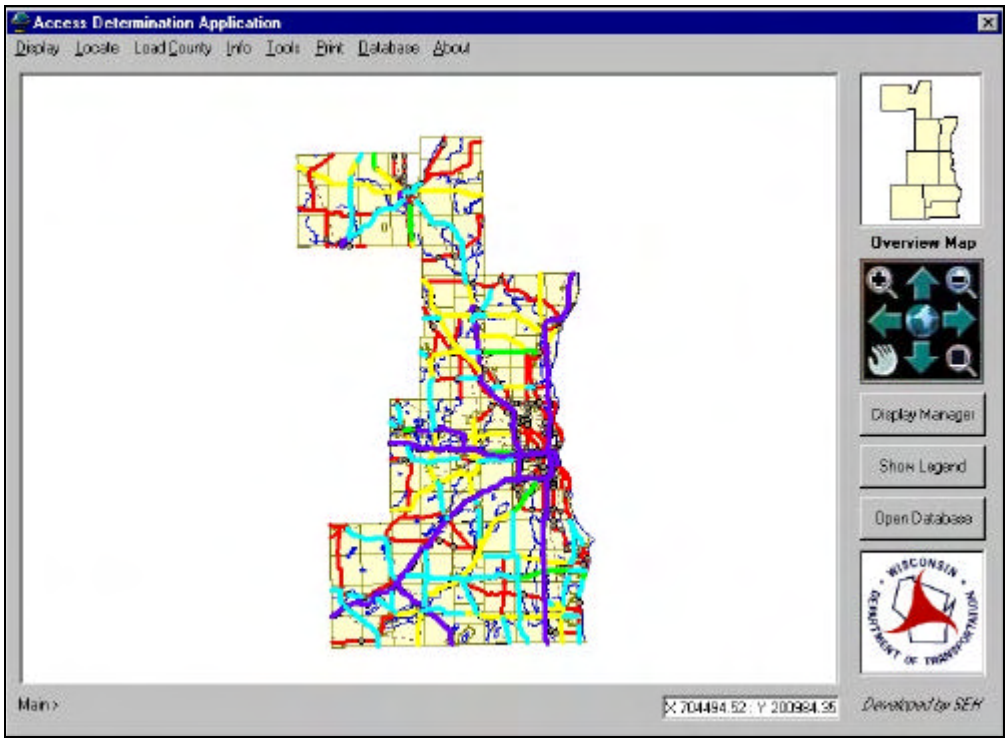
Next install the executable file on the personal/desktop computer. This install will copy dll files and the executable file to your computer and install them similar to a software installation. As stated previously, ADGIS requires the setting of variables in two .ini files on the desktop computers. This task is typically only available for system administrators.

The following variables are utilized in the .ini files:

1. File Name:Paths.ini
   This file contains the paths for the location of the datasets and images that are utilized in the application.
2. File Name:Counties.ini
   This file contains information about the specific county datasets, including county name, type of file, path of file location, shapefile name and critical field in the dataset that is used to link the datasets together with the databases.

Learning ADGIS

Once the user is familiar with a few basic terms and the location of key items, the Access Determination Application should be easy to navigate. Upon opening of the Access Determination Application the user will see the screen displayed below. The use of each tool on the ADGIS screen are explained in detail in the following section of this user's guide.



Pull Down Menus

You will use the "Pull Down" menus to access most of the tools available to view, query and create output of information from the application.

To access a menu item.

1. Move the mouse point to any of the menu items.
2. Left Mouse Click on a menu item to see a list of options that are available for that item.

A brief description of each menu item.

As the user moves forward through The User Manual, each item will be discussed in more detail when it is used for a specific task.

1. Display Menu

   Allows the user to turn on the display manager and turn on/off the aerial photography.

2. Locate Menu

   Allows the user to locate by county, city/village/town, certified survey map, subdivision, driveway, parcel (by owner, property identification number or address) or street intersection. The Locate Menu also allows the user to clear all queried information.

3. Load County Menu

   Allows the user to load the county specific data (parcels, access points, subdivision/CSM/condo and local roads).

4. Info Menu

   Allows the user to get information associated with CSM's, subdivisions, city/village/towns, driveways, road segments (street names, meta-manager information, state trunk network data and connecting highways) and right-of-way plats. There is also a function to locate information on everything and summarize it.

5. Tools Menu

   Allows the user to measure an item or distance, modify all of the data layers, place street labels and notes or create a mailing list.

6. Print Menu

   Allows the user to print what is on the screen.

7. Database Menu

   Allows the user to open the tracking system from the application.

8. About Menu

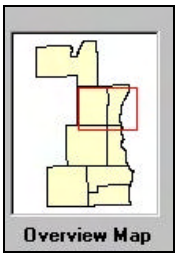
   Allows the user to view a little background information about the application.

Overview Map

You will use the "Overview Map" to locate where you are at in the map screen in comparison to the overall area of the application. You can also use the overview map to adjust your location in the map screen.

To use the overview map.

1. Move the cursor into the area of the overview map.
2. Left Mouse Click a point on the screen, hold down the left mouse button and drag the cursor to the extent of where you want to view and release the left mouse button.
3. The map screen should refresh to this location and a box will appear on the Overview Map to show the area you have selected.



Display Controls

The Display Controls provide several different navigational and magnification features. Each control accomplishes different movements and views within the map screen. To use the display controls left mouse click the control that you would like to use.

Tip By sliding the cursor over each of the icons, a yellow text box will tell the user what function the icon has.

A brief discription of the display controls.

1. Zoom In

   Allows the user to zoom into an area by magnifying the scale of the map screen when the button is selected.

2. Zoom Out

   Allows the user to zoom out from an area by minimizing the scale of the map screen when the button is selected.

3. Zoom Area

   Allows the user to zoom into a specific area on the map screen by using the left mouse click on the start of the area and hold down the left mouse button to drag the box to the second point. This tool can also be used on the Overview Map.

4. Directional Arrows

   Allows the user to move by a distance of 1/3 of the viewing area in the direction of the particular arrow selected. The up arrow moves

north, the right arrow moves east, the down arrow moves south, and the left arrow moves west.

5. Pan

   Allows the user to left mouse click the map screen and drag the screen to an area once the button is selected. Pan is defined as the movement of the screen in a specific direction and distance as directed by the user. The Pan Tool will not function when the map screen is in the world view.

6. World View

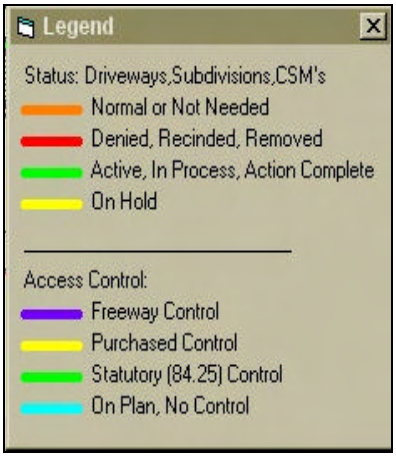
   Allow the user to zoom to the complete extents of the mapping in the application when the button is selected.

Push Button Controls

The Push Button controls located at the right of the map screen allow the user to quickly access certain features without utilizing the pulldown menus. The Display Manager and Load County controls will be explained in the chapters of the user's guide.

To use the Show Legend.

1. Left Mouse Click the "Show Legend" button located at the right on the map screen. This will display the "Legend" pop up window.
2. Select the "x" in the upper right corner of the "Legend" pop up window to close the window.



Database

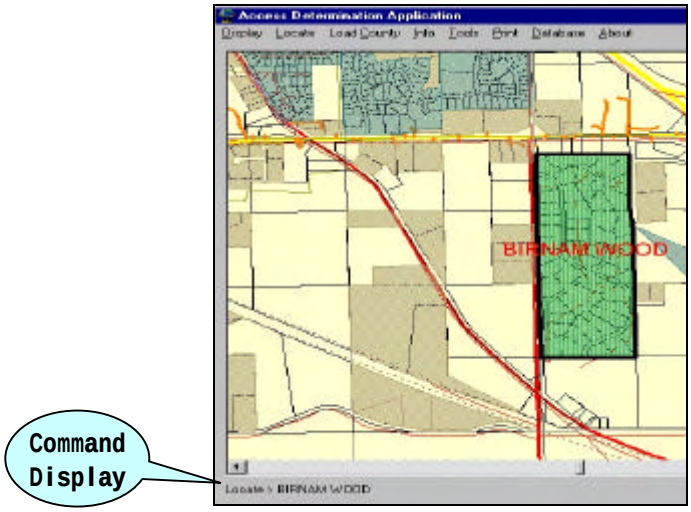
To access the information that is used in the Access Determination Tracking System, left mouse click the "Database" menu option and select the "Open Database" option from the list. This will open the Tracking

System from which the user can add or adjust the data as needed. Once open, it will look similar to the screen displayed below.

Command Display

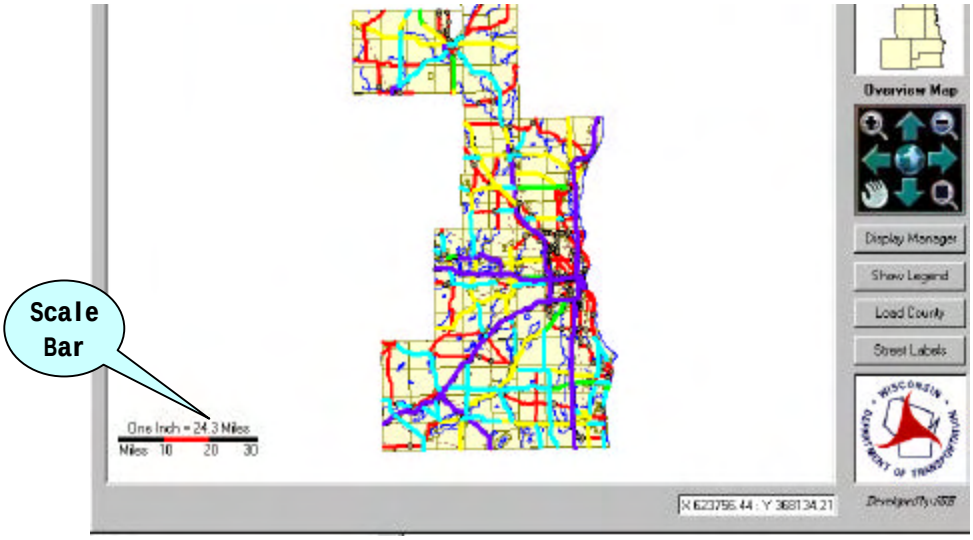
In the lower left corner of the screen is the Command Display. This display shows the last command or action you performed using the menus or the Display Controls. For instance, if the user located the Birnam Wood subdivision, the Command Display line will show "Locate > BIRNAM WOOD".

Throughout the use of this application the Command Display will direct the user on what to do. If ever in doubt as to the current function or the next step to take, utilize the Command Display.



Scale Bar

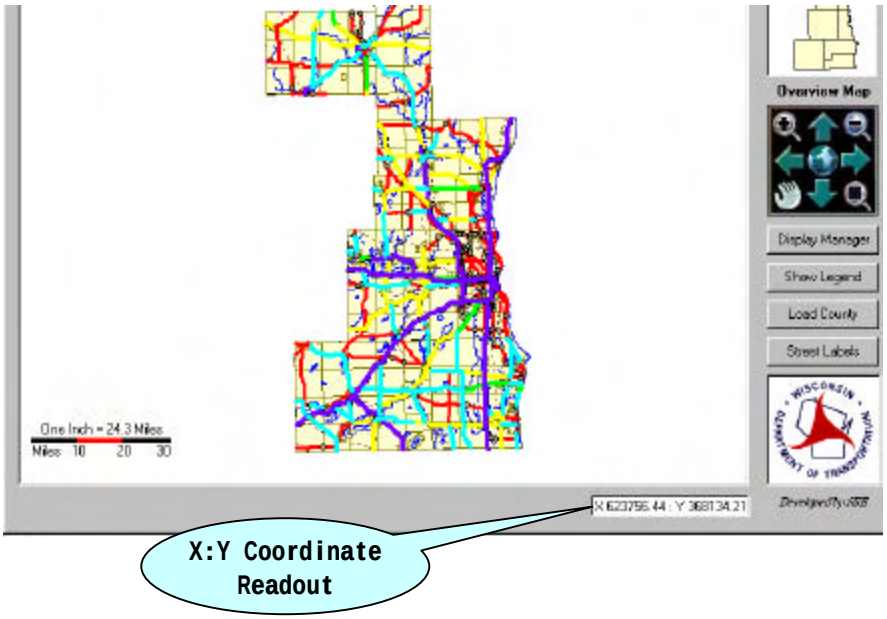
The Scale Bar is located in the lower left corner of the map screen, inside the map limits. The scale bar indicates the scale of the map at any given moment based on the zoom amount. This feature also allows the user to print the screen at any given moment and have the scale of the map available to correspond to the print.



X:Y Coordinate Readout

The X: Y Coordinates are located on the bottom left of the screen. The coordinate readout allows the user to locate coordinately where they are, at any given moment, just by the movement of their cursor on the screen.

The coordinates displayed are Wisconsin Transverse Mercator NAD27.



C H A P T E R 1

Loading County Information

This chapter is the first step in working with the system. You will need to know how to load a county before you will beable to work with some of the main functions. If a user would like specific information about parcels, and how the data relates to them, load the detailed data for a specific county.

Note If the information sought is generalized information about a segment of roadway or an intersection, you may proceed to utilize the application in its current state.

Chapter Contents

2 Load a County

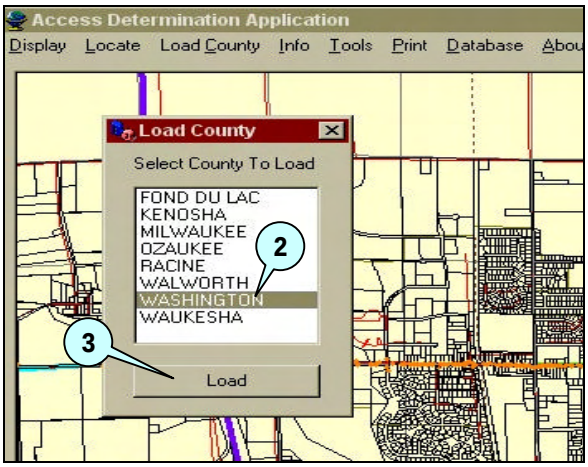
Load a County

You will use the “Load County” menu option located at the top or the “Load County” button located on the right side, of the Access Determination Application display.

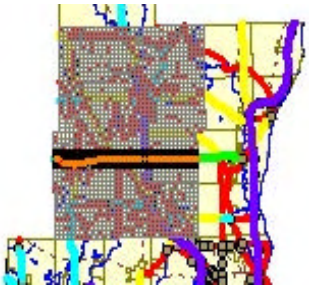
To load a county

1. Left mouse click the “Load County” menu option located on the menu bar at the top of the screen. This will open an external pop up window with a list of the available counties.
2. Left mouse click to select the county for which you would like to find information.
3. Select the “Load” button located at the bottom of the pop up window.
4. The county will be highlighted on the overview map located at the top, right on the display and the local information will appear on your map screen if the county information successfully loaded.

Tip The local data only displays when the main map screen is zoomed in to a small enough scale. This is done due to the large amount of data that gets displayed.



Example:



CHAPTER 2

Using Display Options

This chapter explains how to turn layers on and off and how to view aerial photos with the map.

Chapter Contents

4 Display Manager

5 Display Aerial

5 Unload Aerials

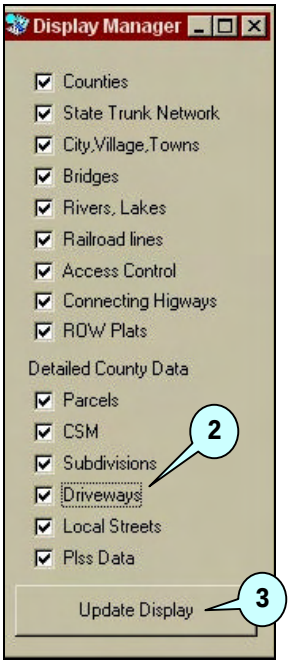
5 Information About Aerial Files

Display Manager

You will use the “Display Manager” button located at the right or the “Display” menu option located at the top left of the Access Determination Application display.

To use the display manager

1. Select the “Display Manager” button located at the right of the screen or Left mouse click the “Display” menu option located on the menu bar at the top of the screen and then select the “Display Manager” option from the Display list. This will open the “Display Manager” pop up window.
2. On the “Display Manager” window check or uncheck the items that you would like to view as layers on the map screen.
3. Select the “Update Display” button to have the request take affect.



Note The more options check marked the slower the system will run.

Display Aerial

This option will allow you to display Aerials.

To display an aerial.

1. Left Mouse Click the “Display” menu option located in the top, left corner of the screen.
2. Select the “Aerial” option from the menu options.
3. Left Mouse Click on the map where the aerials need to be displayed.

Unload Aerials

This option will allow you to remove previously displayed Aerials.

To unload aerials.

1. Left Mouse Click the “Display” menu option located at the top of the screen.
2. Select the “Unload Aerials” option from the Display list.
3. Left Mouse Click on the map where the aerial is displayed.

Information About Aerial Files

The aerial files are orthophotographs that are distributed by the South East Wisconsin Regional Planning Commission (SEWRPC). These series of photos are from the 2000 flight.

C H A P T E R 3

Locating Items

This chapter explains how to quickly locate items by County, CSM, City, Village, Town, Driveway, Parcel, Quarter Section, Subdivision, or Street Intersection.

Tip At any time in the program, right click the mouse to cancel the last command that you entered. For instance, after selecting Street Intersection from the Locate Menu, right click and the Street Intersection window will become inactive.

Chapter Contents

7 Locate County

8 Locate Trans233

9 Locate Conceptual

10 Locate City,Village, Town

11 Locate Driveway

12 Locate Parcel

15 Locate Road Permit

16 Locate Quarter Section

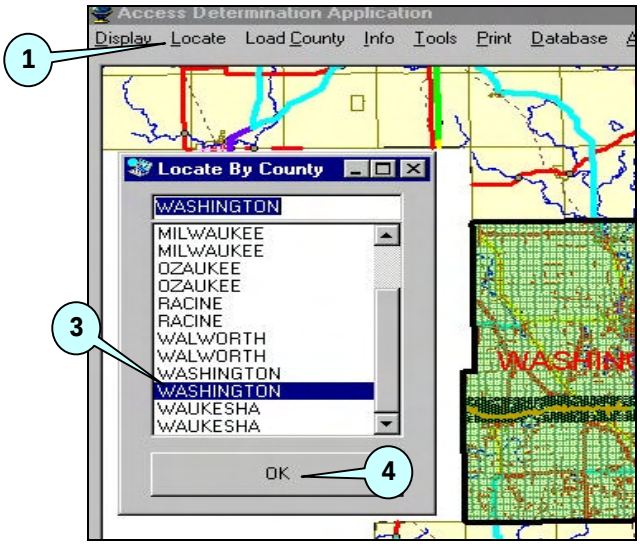
17 Locate Subdivision

18 Locate Street Intersection

Locate County

To locate a county

1. Left Mouse Click the “Locate” menu option located at the top of the screen.
2. Select the “County” option from the Locate list. This will bring up a list of counties available to locate.
3. Left Mouse Click a county from the list.
4. Select the “OK” button located at the bottom of the pop up window.

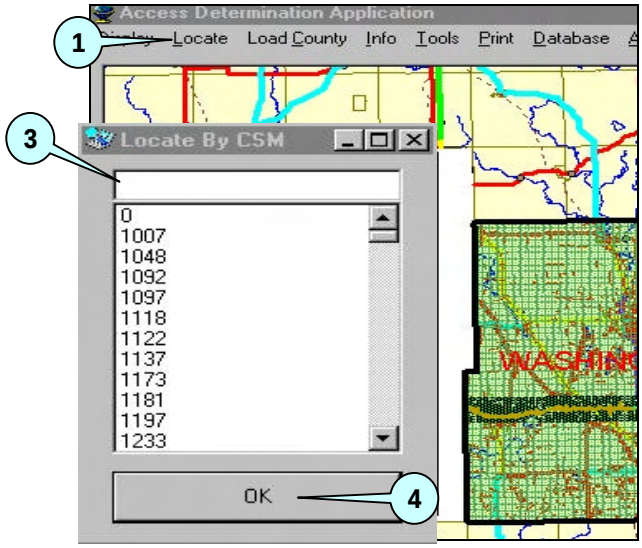


Note Notice that when the county is selected the main display will be re-centered around that county and the county area is highlighted. The Overview Map will also draw a box around the county to show its location in relation to the entire dataset.

Locate Trans233

To locate a Trans233

1. Left Mouse Click the “Locate” menu option located at the top of the screen.
2. Select the “Trans233” option from the Locate list. This will bring up a list of Trans233’s available to locate.
3. Type the Trans233 number into the textbox located at the top of the “Locate by Trans233” pop up window or Left Mouse Click the Trans233 number from the list.
4. Select the “OK” button. The screen will zoom to the area where the Trans233 is located.

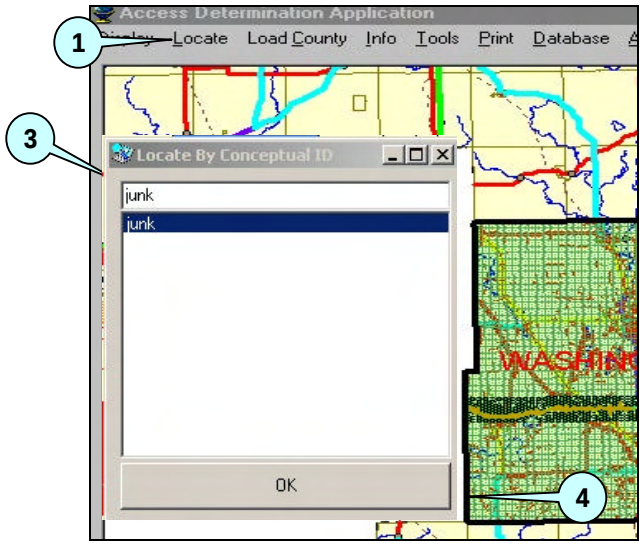


Tip After selecting the Trans233, the screen may be zoomed in too close to determine the location on the map. Click the Zoom Out icon on the Display Controls, the map will zoom out and allow the user to align where they are in conjunction to the surrounding area. The Trans233 number selected will appear in bold print centered within the Trans233 boundaries.

Locate Conceptual

To locate a Conceptual

1. Left Mouse Click the “Locate” menu option located at the top of the screen.
2. Select the “Conceptual” option from the Locate list. This will bring up a list of Conceptuals available to locate.
3. Type the Conceptual number into the textbox located at the top of the “Locate by Conceptual” pop up window or Left Mouse Click the Conceptual number from the list.
4. Select the “OK” button. The screen will zoom to the area where the Conceptual is located.

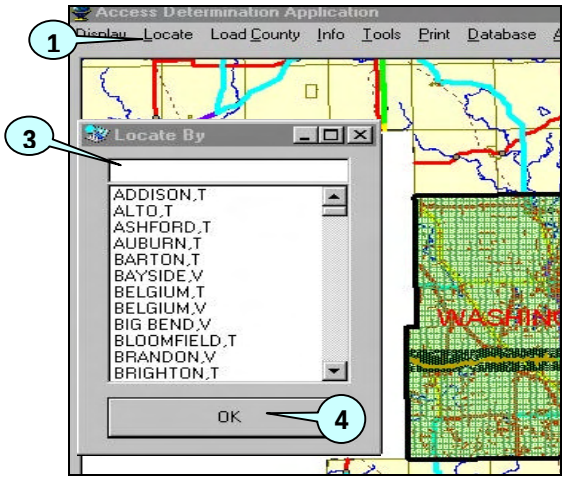


Tip After selecting the Conceptual, the screen may be zoomed in too close to determine the location on the map. Click the Zoom Out icon on the Display Controls, the map will zoom out and allow the user to align where they are in conjunction to the surrounding area. The Conceptual number selected will appear in bold print centered within the Conceptual boundaries.

Locate City, Village, Town

To locate a City, Village, Town

1. Left Mouse Click the “Locate” menu option located at the top of the screen.
2. Select the “City, Village or Town” option from the Locate list. This will bring up a list of Municipalities available to locate.
3. Type the City, Village or Town into the textbox located at the top of the “Locate by” pop up window or Left Mouse Click the City, Village or Town from the list.
4. Select the “OK” button. The screen will zoom to the area where the City, Village, or Town is located.

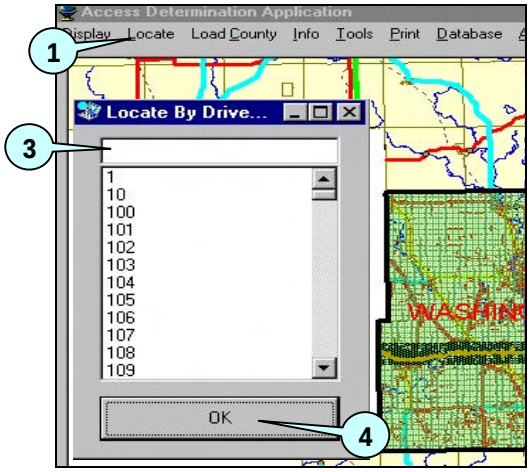


Tip After selecting the City,Town,Village, the screen may be zoomed in too close to determine the location on the map. Click the Zoom Out icon on the Display Controls, the map will zoom out and allow the user to align where they are in conjunction to the surrounding area.

Locate Driveway

To locate a driveway

1. Left Mouse Click the “Locate” menu option located at the top of the screen.
2. Select the “Driveway” option from the Locate list. This will bring up a list of Driveways available to locate.
3. Type the Driveway number into the textbox located at the top of the “Locate by Drive…” pop up window or Left Mouse Click the Driveway number from the list.
4. Select the “OK” button. The screen will zoom to the area where the Driveway is located.



Tip At any time, either zoomed in or at full extent, the user can clear the last item you located. Use the Locate Menu and Clear Located Item(s).

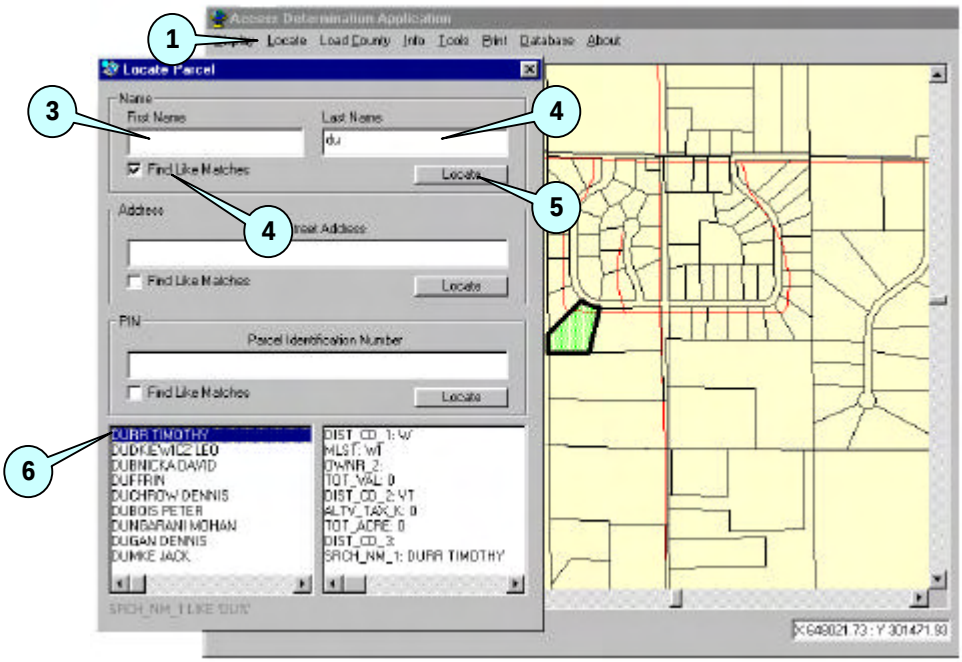
Tip After selecting the driveway, the screen may be zoomed in too close to determine the location on the map. Click the Zoom Out icon on the Display Controls, the map will zoom out and allow the user to align where they are in conjunction to the surrounding area.

Locate Parcel

To locate Parcel by Owner Name

This option allows the user to input all or part of an owner's name.

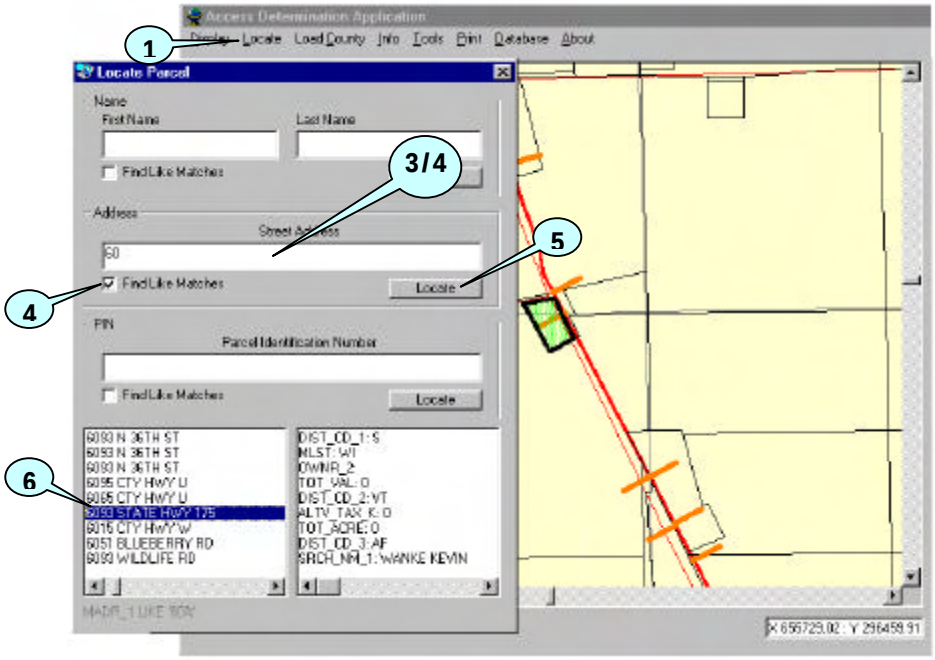
1. Left Mouse Click the "Locate" menu option located at the top of the screen.
2. Select the "Parcel" option from the Locate list. This will bring up a search form.
3. Type the First and Last Name of the Owner you would like to locate into the First Name and Last Name textboxes located in the "Name" box at the top of the "Locate Parcel" pop up window.
4. You may also type the start of the First and Last Name of the Owner you would like to locate and check mark the "Find Like Matches" located below the First Name textbox.
5. Select the "Locate" button located inside the "Name" box at the top of the "Locate Parcel" pop up window.
6. Left Mouse Click the name of the owner you would like to locate from the listbox located at the bottom left of the "Locate Parcel" pop up window. The parcel of the owner selected will be displayed in green on the map screen.



To locate Parcel by Address

This option allows the user to enter the owner address or part of the owner address.

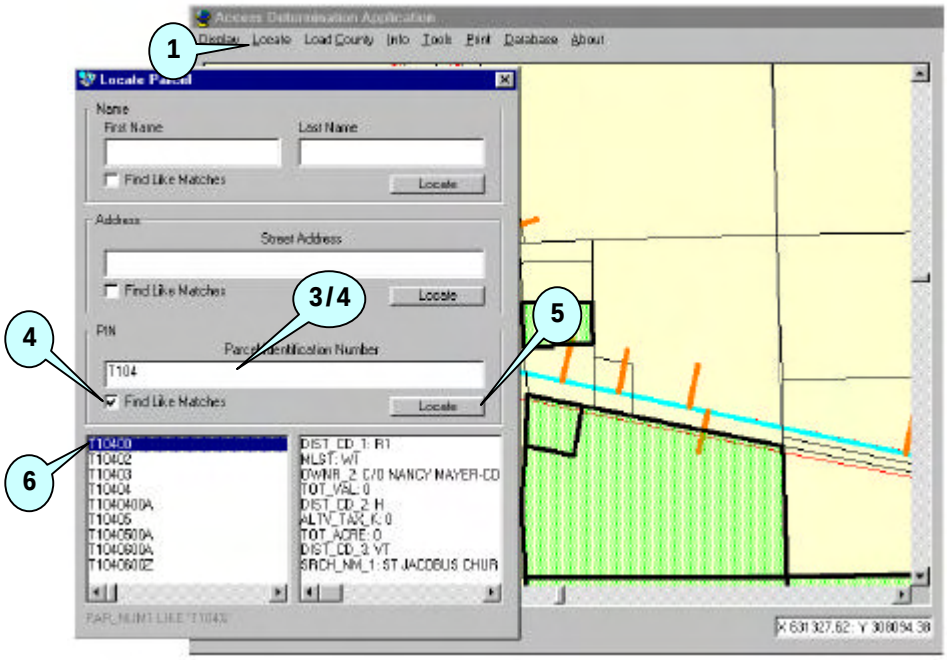
1. Left Mouse Click the “Locate” menu option located at the top of the screen.
2. Select the “Parcel” option from the Locate list. This will bring up a search form.
3. Type the address of the Owner you would like to locate into the Street Address textbox located in the “Address” box in the middle of the “Locate Parcel” pop up window.
4. You may also type the start of the address of the Owner you would like to locate and check mark the “Find Like Matches” located below the Street Address textbox.
5. Select the “Locate” button located inside the “Addres” box in the middle of the “Locate Parcel” pop up window.
6. Left Mouse Click the address of the owner you would like to locate from the listbox located at the bottom left of the “Locate Parcel” pop up window. The parcel of the owner selected will be displayed in green on the map screen.



To locate Parcel by PIN(Parcel Identification Number)

This option allows the user to enter the PIN, which is the unique identification number created for each parcel, by the county.

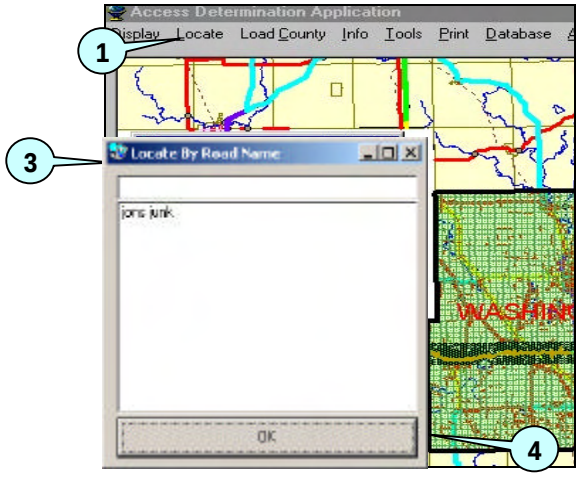
1. Left Mouse Click the “Locate” menu option located at the top of the screen.
2. Select the “Parcel” option from the Locate list. This will bring up a search form.
3. Type the PIN of the Owner you would like to locate into the Parcel Identification Number textbox located in the “PIN” box in the middle of the “Locate Parcel” pop up window.
4. You may also type the start of the PIN of the Owner you would like to locate and check mark the “Find Like Matches” located below the Street Address textbox.
5. Select the “Locate” button located inside the “PIN” box in the middle of the “Locate Parcel” pop up window.
6. Left Mouse Click the PIN of the owner you would like to locate from the listbox located at the bottom left of the “Locate Parcel” pop up window. The parcel of the owner selected will be displayed in green on the map screen.



Locate Road Permit

To locate a road permit

5. Left Mouse Click the “Locate” menu option located at the top of the screen.
6. Select the “Road Permit” option from the Locate list. This will bring up a list of Driveways available to locate.
7. Type the Road Permit number into the textbox located at the top of the “Locate by Road…” pop up window or Left Mouse Click the Road Permit number from the list.
8. Select the “OK” button. The screen will zoom to the area where the Driveway is located.

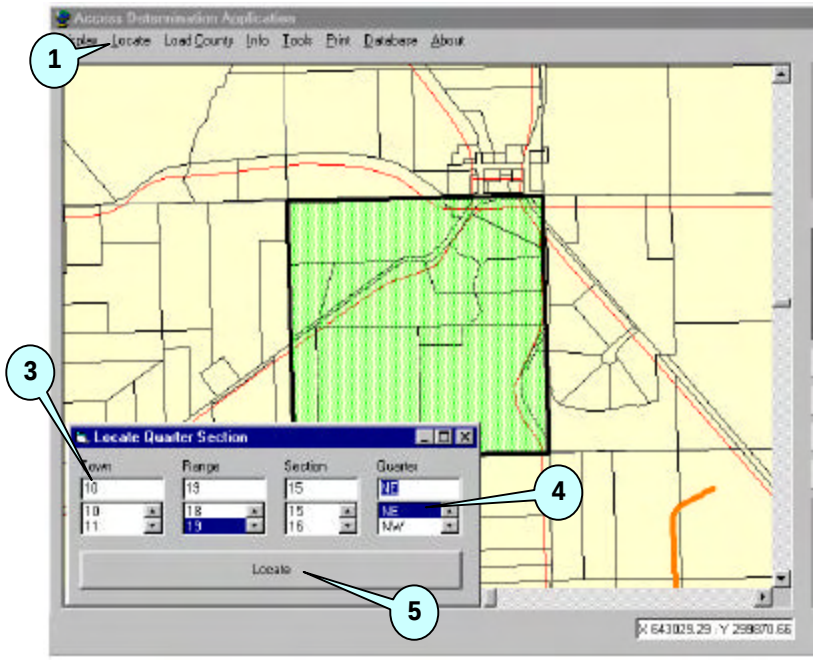


Tip After selecting the road permit segment, the screen may be zoomed in too close to determine the location on the map. Click the Zoom Out icon on the Display Controls, the map will zoom out and allow the user to align where they are in conjunction to the surrounding area.

Locate Quarter Section

To locate a quarter section

1. Left Mouse Click the “Locate” menu option located at the top of the screen.
2. Select the “Quarter Section” option from the Locate list. This will display the “Locate Quarter Section” pop up window.
3. Type the Section, Town, Range, and Quarter of the Quarter Section you would like to locate into the textboxes located at the top of the “Locate Quarter Section” pop up window.
4. You may also select the Section, Town, Range, and Quarter you would like to locate from the listboxes located below each textbox on the “Locate Quarter Section” pop up window.
5. Select the “Locate” button. The Quarter Section selected will be displayed in green on the map screen.

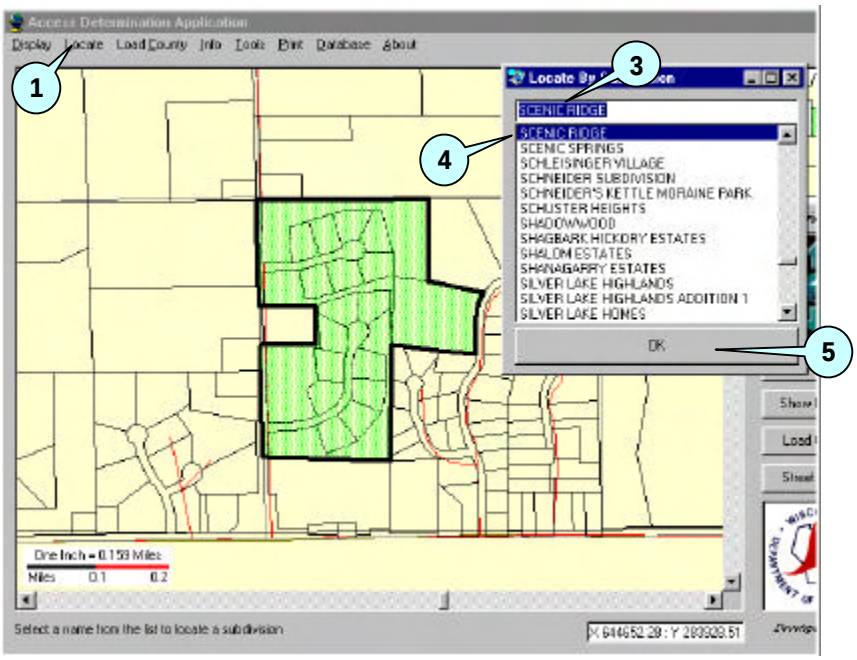


Note You must enter all four fields to locate by Quarter Section.

Locate Subdivision

To locate a Subdivision

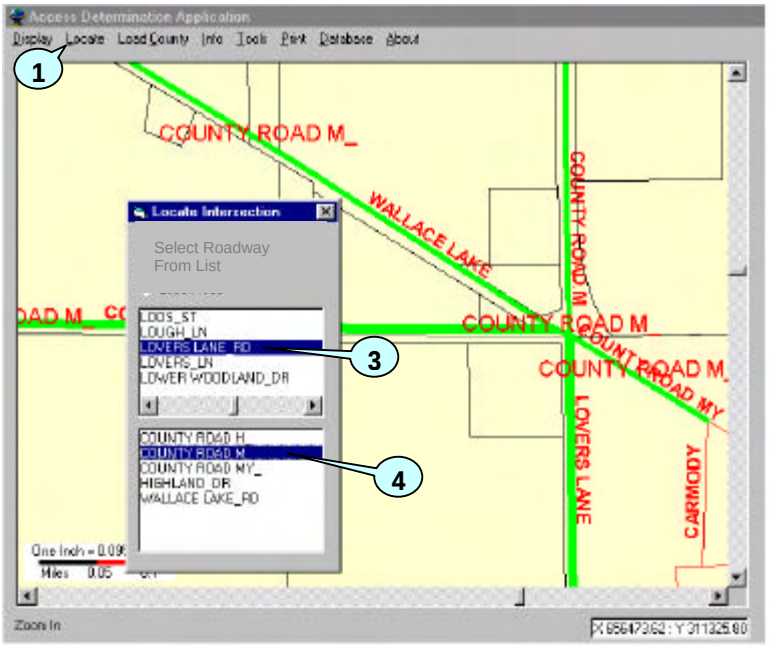
1. Left Mouse Click the “Locate” menu option located at the top of the screen.
2. Select the “Subdivision” option from the Locate list. This will display the “Locate by Subdivision” pop up window.
3. Type in the textbox located at the top of the “Locate by Subdivision” pop up window to jump to the subdivision name in the list displayed in the middle of the “Locate by Subdivision” pop up window.
4. Select the Subdivision you would like to locate from the list.
5. Select the “OK” button. The Subdivision selected will be displayed in green on the map screen.



Locate Street Intersection

To locate a Street Intersection

1. Left Mouse Click the “Locate” menu option located at the top of the screen.
2. Select the “Street Intersection” option from the Locate list. This will display up the “Locate Intersection” pop up window.
3. Select the road you would like to locate from the listbox located below the Road Type options on the “Locate Intersection” pop up window.
4. Select the intersecting roadway from the listbox located at the bottom of the “Locate Intersection” pop up window. The Street Intersection selected will be displayed in green on the map screen.



Note You may need to zoom in or out and turn Street Labels on to see both road names.

CHAPTER 4

Info

This chapter will explain how to use the Info Menu. The Info Menu allows the user to identify what information will be displayed when they select an item on the map screen. This feature also allows users to identify any Trans233's, Subdivision's, Driveway's, Right-of-Way Plats, MetaManager Segments, etc. that are with in 50 feet of the selected item.

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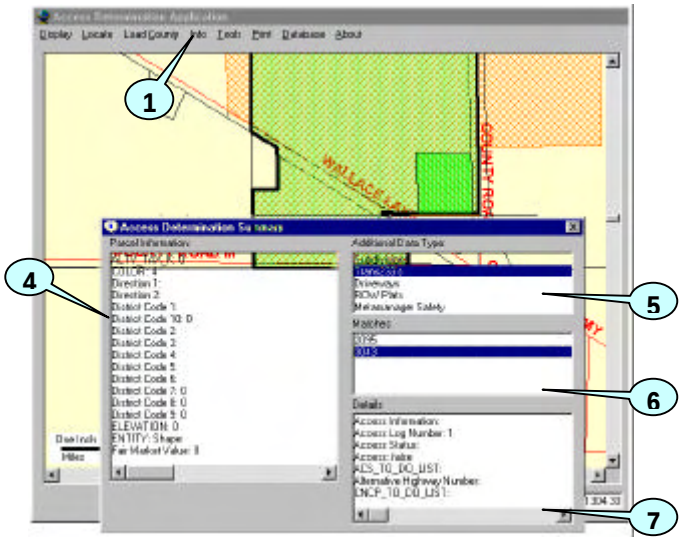
31 On Subdivision

Summary By Parcel

To get info by Parcel

1. Left Mouse Click the “Info” menu option located at the top of the screen.
2. Select the “Summary By Parcel” option from the Info list. Your mouse pointer will become an arrow with an ⓘ.
3. Left Mouse Click the parcel for which you would like to view information. This will display the “Access Determination Summary” pop up window.
4. The “Parcel Information” listbox located at the left of the pop up window displays the information from the county for the selected parcel.
5. The “Additional Data Type” listbox located at the top, right of the pop up window allows the user to locate near by Subdivisions, Trans233, etc. Select an item from this list.
6. The “Matches” listbox below the “Additional Data Type” listbox displays what matches were found for the item selected. If none were found this will also be displayed.
7. Select an item from the “Matches” listbox to display the information for this item in the “Details” listbox located below the “Matches” listbox on the pop up window.

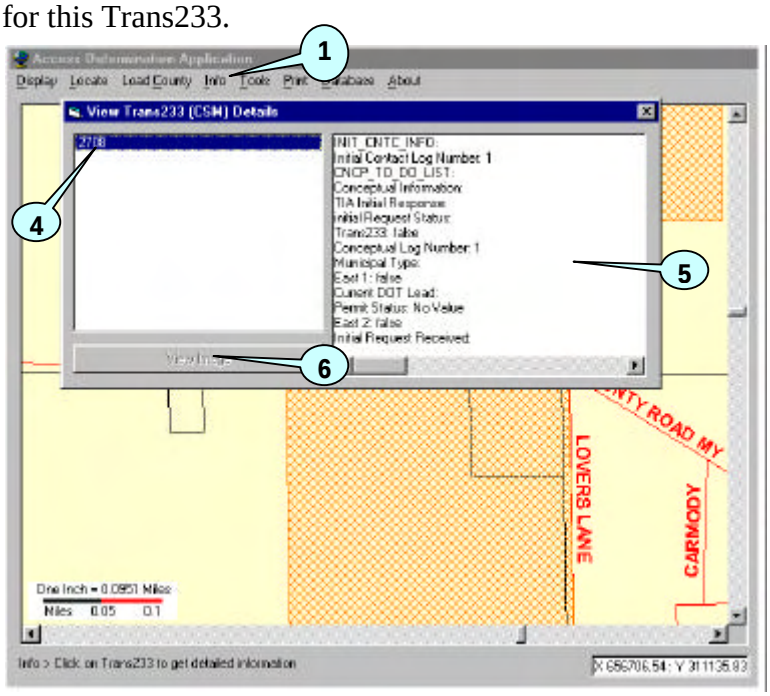


Note When an image is available for a selected item in the “Matches” listbox the “View Image” button with be displayed. The user’s computer must have Adobe Acrobat Reader installed in order to view these images.

On Trans233(CSM)

To get info by Trans233(CSM)

1. Left Mouse Click the “Info” menu option located at the top of the screen.
2. Select the “On Trans233(CSM)” option from the Info list. Your mouse pointer will become an arrow with an ⓘ.
3. Left Mouse Click the Trans233 for which you would like to view information. This will display “View Trans233(CSM) Details” pop up window.
4. Select the Trans233 for which you would like to view information from the listbox located at the left on the pop up window.
5. The detailed information is displayed in the listbox located at the right on the pop up window.
6. Select the “View Image” button to display the image for this Trans233.

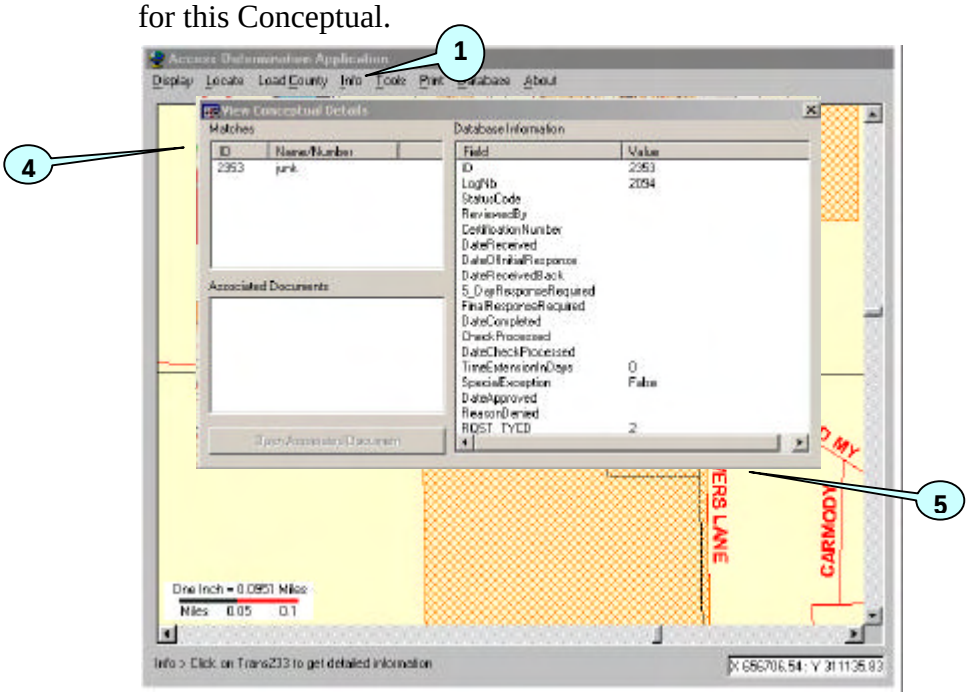


Note When an image is available for the selected Trans233 the “View Image” button with be enabled. The user’s computer must have Adobe Acrobat Reader installed in order to view these images.

On Conceptual

To get info by Conceptual

7. Left Mouse Click the “Info” menu option located at the top of the screen.
8. Select the “On Conceptual” option from the Info list. Your mouse pointer will become an arrow with an ⓘ.
9. Left Mouse Click the Conceptual for which you would like to view information. This will display “View Conceptual Details” pop up window.
10. Select the Conceptual for which you would like to view information from the listbox located at the left on the pop up window.
11. The detailed information is displayed in the listbox located at the right on the pop up window.
12. Select the “View Image” button to display the image for this Conceptual.



Note When an image is available for the selected Conceptual the “View Image” button with be enabled. The user’s computer must have Adobe Acrobat Reader installed in order to view these images.

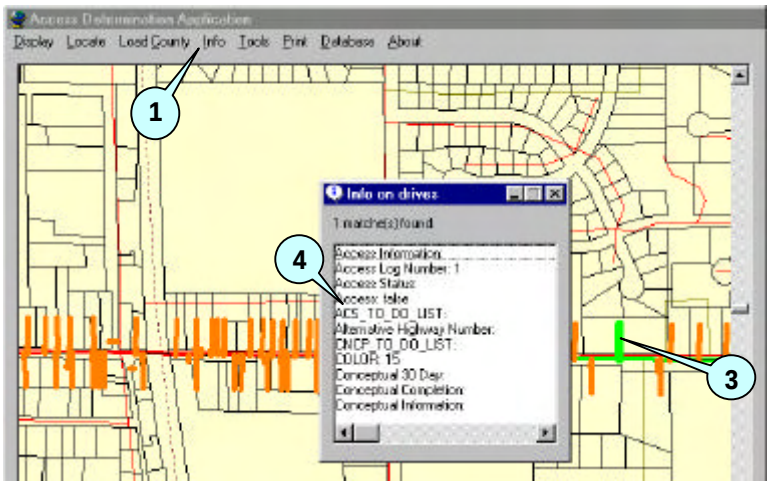
On City, Village, Town

Left Mouse Click the “Info” menu option located at the top of the screen. Select the “On City, Village, Town” option from the Info list. Your mouse pointer will become and arrow with an ⓘ. As you move your mouse around on the map screen the name of the Municipality will be displayed in a yellow box.

On Driveway

To get info by Driveway

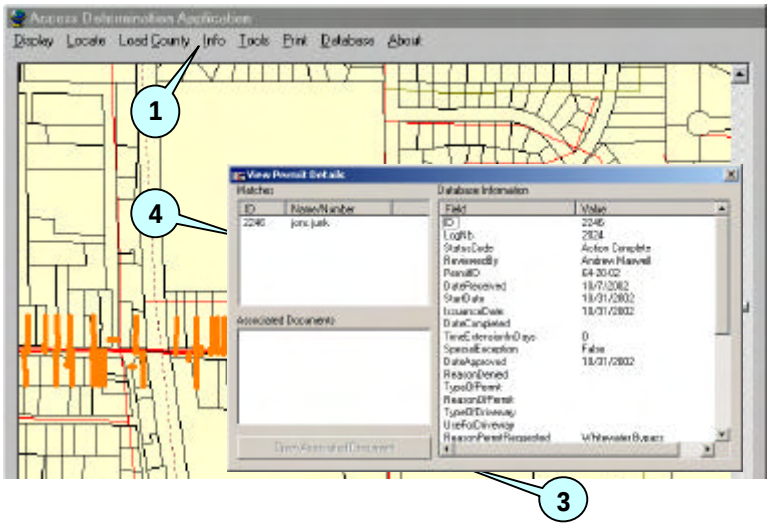
1. Left Mouse Click the “Info” menu option located at the top of the screen.
2. Select the “On Driveway” option from the Info list. Your mouse pointer will become an arrow with an ⓘ.
3. Left Mouse Click the driveway line for which you would like to view information. This will display the “Info on drives” pop up window.
4. The listbox displays the information for the selected driveway.



On Road Permit

To get info by Road Permit

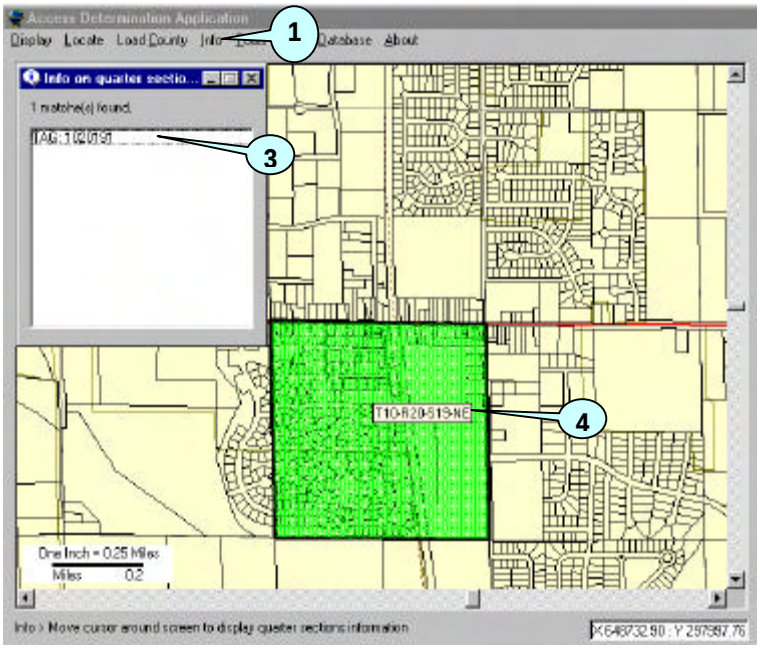
5. Left Mouse Click the “Info” menu option located at the top of the screen.
6. Select the “On Road Permit” option from the Info list. Your mouse pointer will become an arrow with an ⓘ.
7. Left Mouse Click the road permit line for which you would like to view information. This will display the “Info on road permit” pop up window.
8. The listbox displays the information for the selected driveway.



On Quarter Section

To get info by Quarter Section

1. Left Mouse Click the “Info” menu option located at the top of the screen.
2. Select the “On Quarter Section” option from the Info list. Your mouse pointer will become an arrow with an ⓘ.
3. Left Mouse Click the Quarter Section for which you would like to view information. This will display the “Info on quarter sectio…” pop up window. The quarter section selected will be displayed in the listbox on the pop up window.
4. Holding your mouse over the quarter section will display a yellow box with the quarter section information.

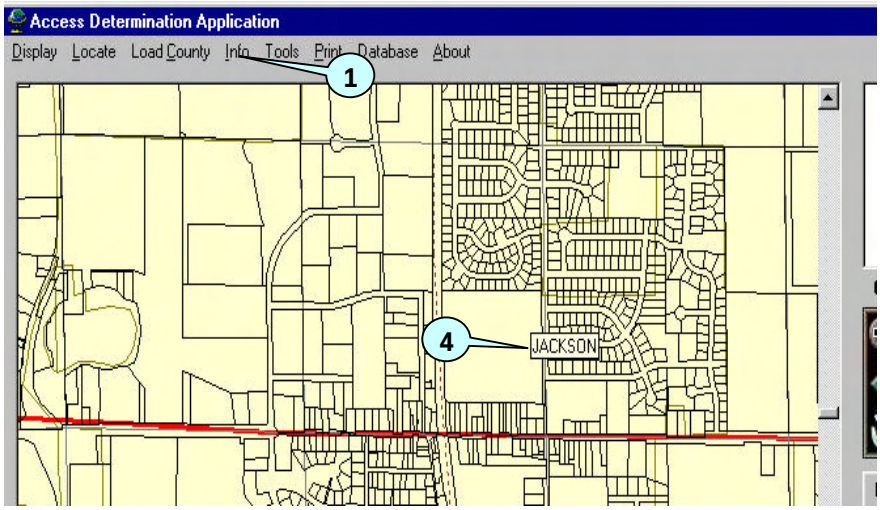


On Road Segment

This feature allows you to get information on road segements through four different means.

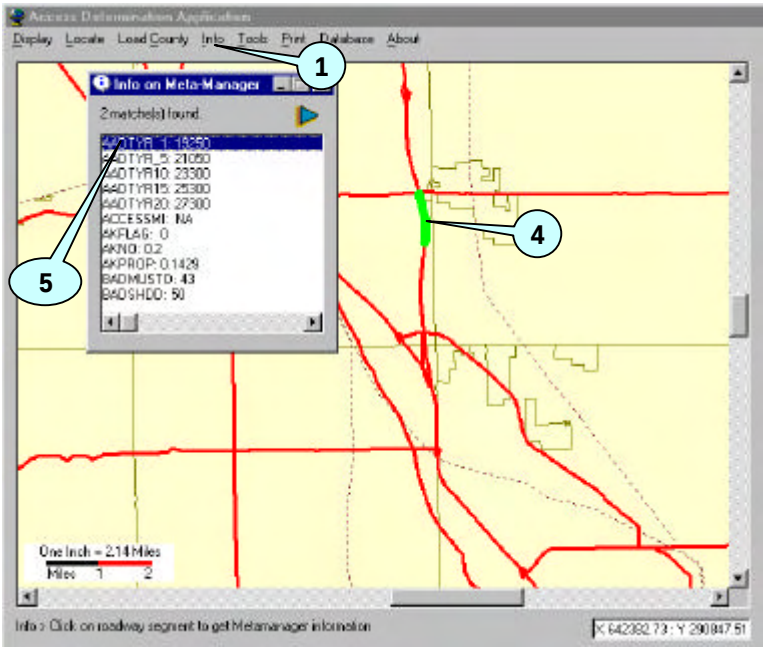
To get info by Street Name

1. Left Mouse Click the “Info” menu option located at the top of the screen.
2. Select the “On Road Segment” option from the Info list.
3. Select the “Street Name” option from the On Road Segment list. Your mouse pointer will become an arrow with an ⓘ.
4. As you move your mouse around on the map screen the street name will be displayed in a yellow box.



To get info by Meta-Manager

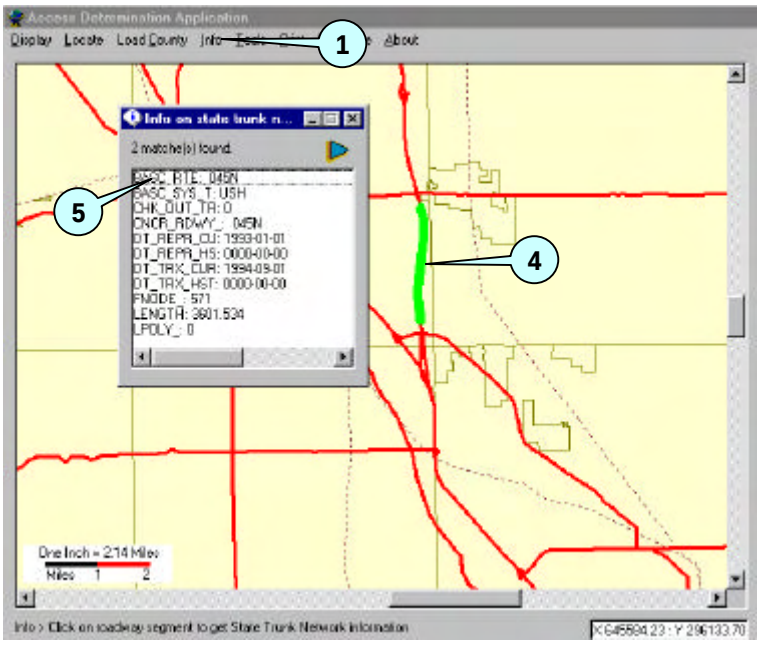
1. Left Mouse Click the “Info” menu option located at the top of the screen.
2. Select the “On Road Segment” option from the Info list.
3. Select the “Meta-Manager” option from the On Road Segment list. Your mouse pointer will become an arrow with an ⓘ.
4. Left Mouse Click on a State Trunk Highway. This will display the “Info on Meta-Manager” pop up window.
5. The listbox on the “Info on Meta-Manager” pop up window displays the data that the Meta-Manager system has on the selected segement of highway.



Note The Meta-Manager data is a compilation of highway information. Its overlying goal is to provide information on deficiencies on the state’s highway system. It includes specific information on crashes – including the type and the segment where they occur, traffic data including Level of Service and projections, as well as the pavement conditions.

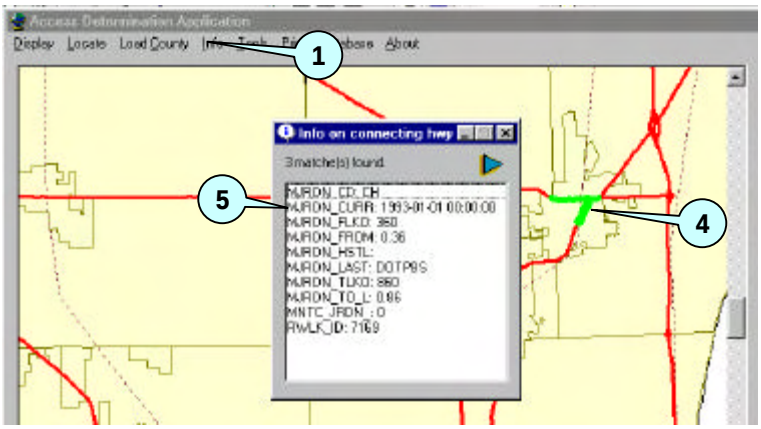
To get info by State Trunk Data

1. Left Mouse Click the “Info” menu option located at the top of the screen.
2. Select the “On Road Segment” option from the Info list.
3. Select the “State Trunk Data” option from the On Road Segment list. Your mouse pointer will become an arrow with an ⓘ.
4. Left Mouse Click on a State Trunk Highway. This will display the “Info on state trunk n…” pop up window.
5. The listbox on the “Info on state trunk n…” pop up window displays the data for the selected segement of highway.



To get info by Connecting Hwy

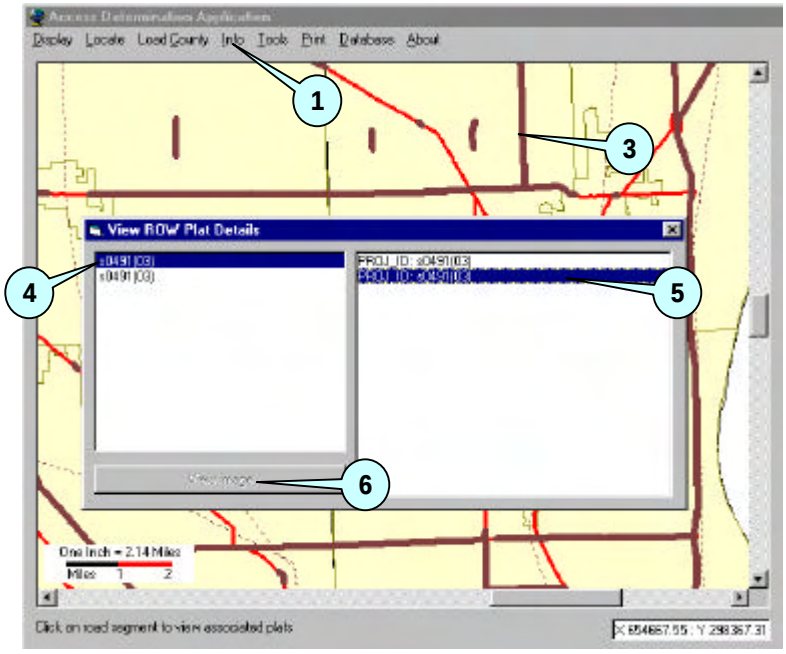
1. Left Mouse Click the “Info” menu option located at the top of the screen.
2. Select the “On Road Segment” option from the Info list.
3. Select the “Connecting Hwy” option from the On Road Segment list. Your mouse pointer will become an arrow with an ⓘ.
4. Left Mouse Click on a Highway. This will display the “Info on connecting hwy“ pop up window.
5. The listbox on the “Info on connecting hwy” pop up window displays the data for the selected segement of highway.



On ROW Plats

To get info by ROW Plat

1. Left Mouse Click the “Info” menu option located at the top of the screen.
2. Select the “On ROW Plats” option from the Info list. Your mouse pointer will become an arrow with an ⓘ.
3. Left Mouse Click on a ROW line. This will display the “View ROW Plat Details“ pop up window. The listbox on the left of the pop up window displays a list of all ROW Plats selected.
4. Select one of the plats listed in the listbox located on the left of the pop up window and it will display information in the listbox located on the right of the pop up window.
5. Selecting an item from the listbox located on the right side of the pop up window will allow you to view an image of the ROW Plat if one is available.
6. Select the “View Image” button located at the bottom of the pop up window to view the selected image.

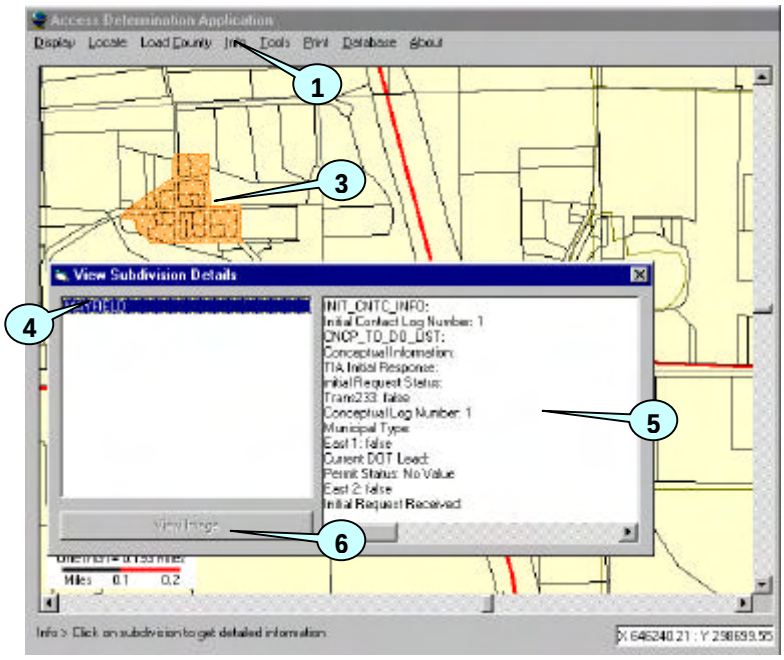


Note When an image is available for the selected ROW Plat the “View Image” button will be enabled. The user’s computer must have Adobe Acrobat Reader installed in order to view these images.

On Subdivision

To get info by Subdivision

1. Left Mouse Click the “Info” menu option located at the top of the screen.
2. Select the “On Subdivision” option from the Info list. Your mouse pointer will become an arrow with an ⓘ.
3. Left Mouse Click on a Subdivision. This will display the “View Subdivision Details“ pop up window. The listbox on the left of the pop up window displays a list of all Subdivisions selected.
4. Select one of the subdivisions listed in the listbox located on the left of the pop up window and it will display information in the listbox located on the right of the pop up window.
5. Selecting an item from the listbox located on the right side of the pop up window will allow you to view an image of the Subdivision Plat if one is available.
6. Select the “View Image” button located at the bottom of the pop up window to view the selected image.



Note When an image is available for the selected Subdivision the “View Image” button with be enabled. The user’s computer must have Adobe Acrobat Reader installed in order to view these images.

C H A P T E R 5

Tools

This chapter will explain how to use the Tools Menu. The Tools Menu offers an array of options for measuring and modifying elements within the Access Determination Application.

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33 Measure

34 Measure – Minimum Distance

35 Driveway

37 Road Permit

39 Conceptuals

42 Trans233

45 Subdivision

48 Street Labels

49 Notes

54 Mailing List

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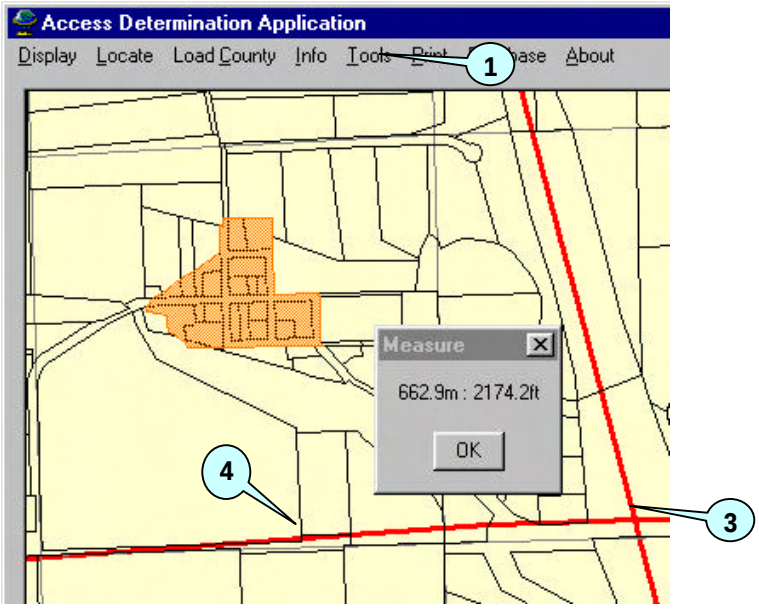
Measure

The Measure Tool is used to calculate the distance between two points on the map screen.

To use the Measure Tool

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Measure” option from the Tools list. Your mouse pointer will become a cross symbol.
3. Left Mouse Click the starting point of the object you would like to measure.
4. Double Left Mouse Click the ending point of the object you would like to measure. This will display the “Measure” pop up window with the distance shown in meters and feet.

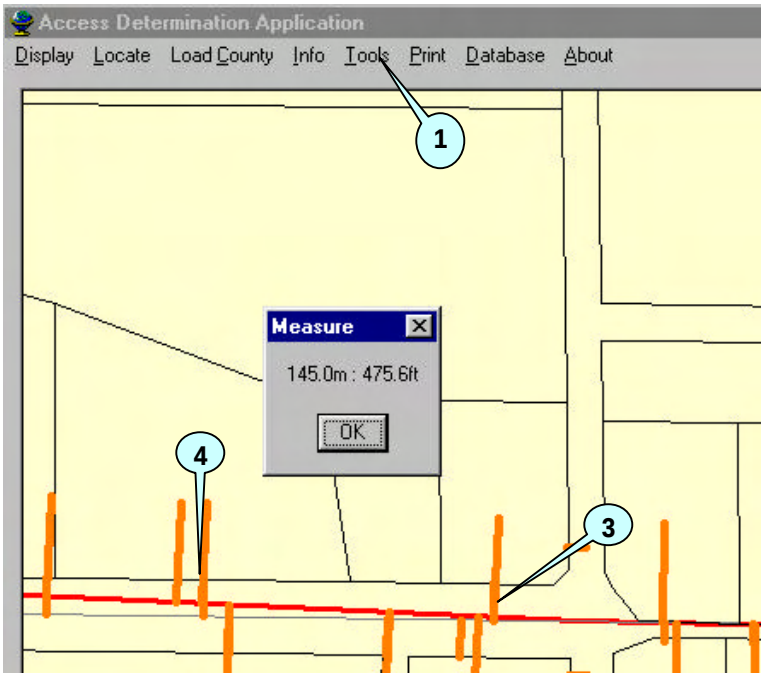


Measure Minimum Distance

The Measure Minimum Distance Tool is used to calculate the minimum distance between two objects.

To use the Measure Minimum Distance Tool

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Measure Minimum Distance” option from the Tools list. Your mouse pointer will become a cross symbol.
3. Left Mouse Click the first object you would like to start measuring.
4. Left Mouse Click the second object you would like to finish measuring. This will display the “Measure” pop up window with the distance shown in meters and feet.



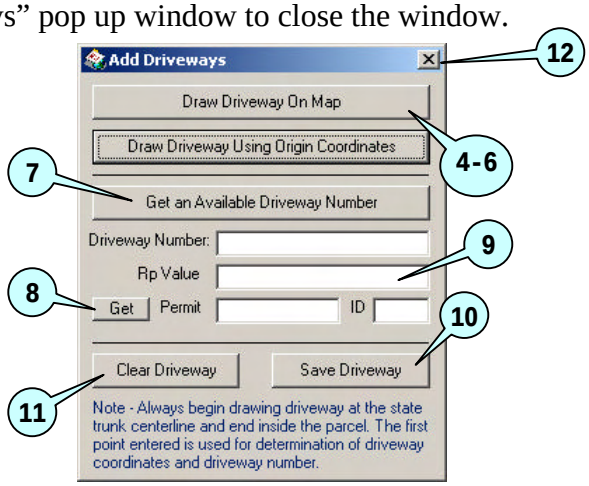
Note This distance is the minimum distance between two items and may not reflect an actual distance between two points.

Driveway

The Driveway Tool allows the user to add, modify or remove driveways from the map screen.

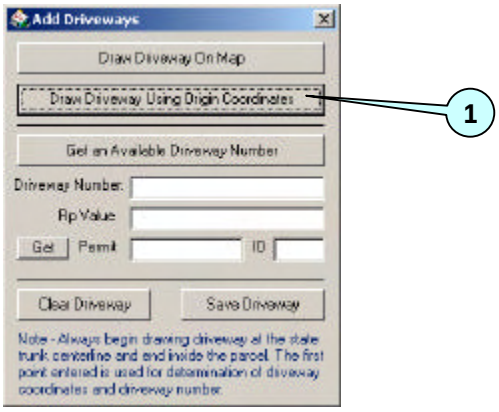
To add a driveway.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Driveway” option from the Tools list.
3. Select the “Add” option from the Driveway list. This will display the “Add Driveways” pop up window.
4. Select the “Draw Driveway On Map” button. Your mouse pointer will become a pencil symbol.
5. Left Mouse Click on the map screen where the driveway is to be placed, keep selecting points until the last point is entered.
6. Double Left Mouse Click the last point to add the line to the map screen.
7. Select the “Get an Available Driveway Number” button or Enter the Driveway Number.
8. Select the “Get” button to select a permit number and ID number from the database.
9. If you have the RP Number you may also enter this.
10. Select the “Save Driveway” button to save the new driveway to the map screen.
11. Select the “Clear Driveway” button if you would like to redraw or cancel the driveway added.
12. Select the “x” in the upper right corner of the “Add Driveways” pop up window to close the window.



To add a driveway by a coordinate.

1. Select the “Draw Driveway Using Origin Coordinates” button. This will display the “Add Driveways” pop up window.
2. Enter the X and Y coordinates of the beginning point of the driveway.
3. Select the “Continue” button. This will place a point on the map screen.



4. Double Left Mouse Click the end point of the driveway on the map screen.
5. Follow the directions as above for adding a new driveway.

To remove a driveway.

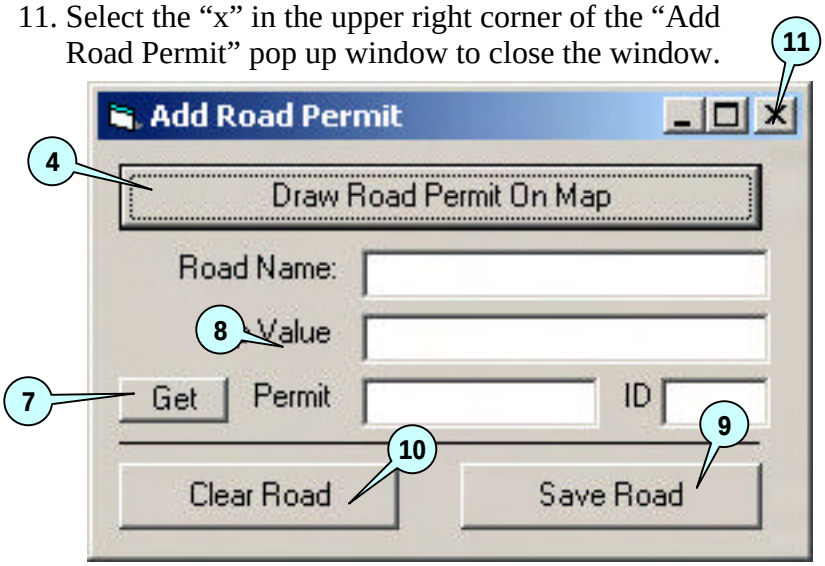
1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Driveway” option from the Tools list.
3. Select the “Remove” option from the Driveway list.
4. This brings up the “Select Driveway to Remove” button. Select the button and your mouse pointer will become a cross symbol.
5. Double Left Mouse Click on the driveway you would like to remove.

Road Permits

The Road Permit Tool allows the user to add, modify or remove road permits from the map screen.

To add a road permit.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Road Permit” option from the Tools list.
3. Select the “Add” option from the Road Permit list. This will display the “Add Road Permit” pop up window.
4. Select the “Draw Road Permit On Map” button. Your mouse pointer will become a pencil symbol.
5. Left Mouse Click on the map screen where the Road Permit is to be placed, keep selecting points until the last point is entered.
6. Double Left Mouse Click the last point to add the line to the map screen.
7. Select the “Get” button to select a permit number and ID number from the database.
8. If you have the RP Number you may also enter this.
9. Select the “Save Road Permit” button to save the new driveway to the map screen.
10. Select the “Clear Road Permit” button if you would like to redraw or cancel the driveway added.
11. Select the “x” in the upper right corner of the “Add Road Permit” pop up window to close the window.



To remove a Road Permit.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Road Permit” option from the Tools list.
3. Select the “Remove” option from the Road Permit list.
4. This brings up the “Select Road Permit to Remove” button. Select the button and your mouse pointer will become a cross symbol.
5. Double Left Mouse Click on the Road Permit you would like to remove.

To modify a Road Permit.

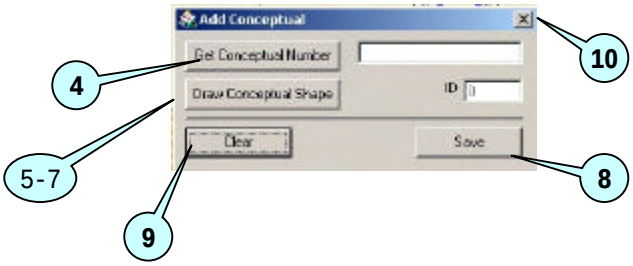
1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Road Permit” option from the Tools list.
3. Select the “Modify” option from the Road Permit list.
4. This brings up the “Select Road Permit to Modify” button. Select the button and your mouse pointer will become a cross symbol.
5. Double Left Mouse Click on the Road Permit you would like to remove.
6. The rest of the options are similar to the “Add Road Permit” functions.

Conceptuals

The Conceptuals Tool allows the user to add, remove, or modify Conceptuals on the map screen.

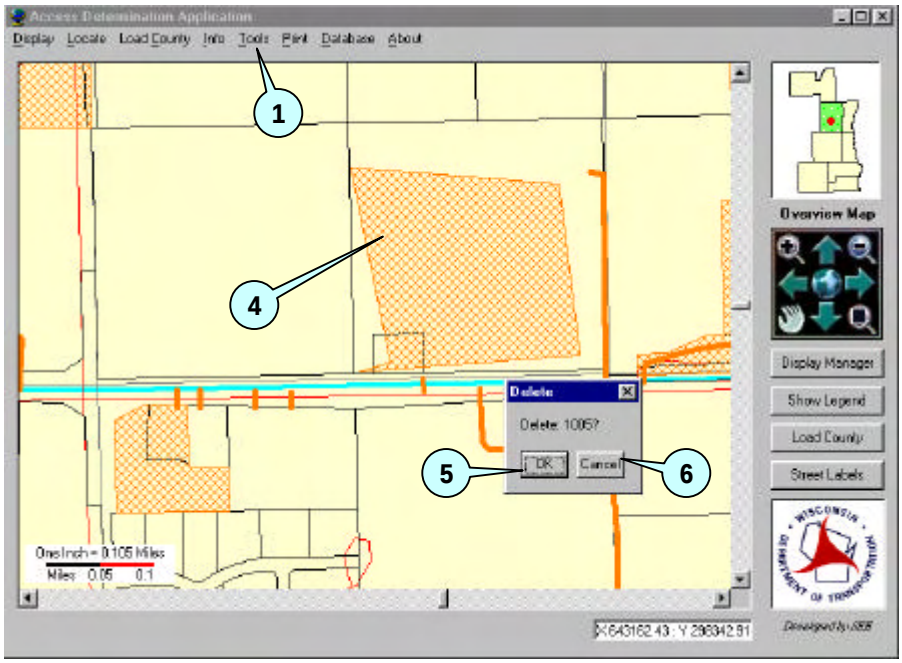
To add a Conceptuals.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Conceptuals” option from the Tools list.
3. Select the “Add” option from the Conceptuals list. This will display the “Add Conceptuals” pop up window.
4. Select the “Get Conceptual Number” to automatically pick a number from the database or enter the Conceptuals Number.
5. Select the “Draw Conceptual Shape” button located in the lower left corner of the pop up window.
6. Left Mouse Click each point you would like to make for the Conceptual being added.
7. Double Left Mouse Click on the last point to close the Conceptual shape being added.
8. Select the “Save” button to save the new Conceptual.
9. Select the “Clear” button if you would like to redraw or cancel the Conceptual added.
10. Select the “x” in the upper right corner of the “Add Conceptual” pop up window to close the window.



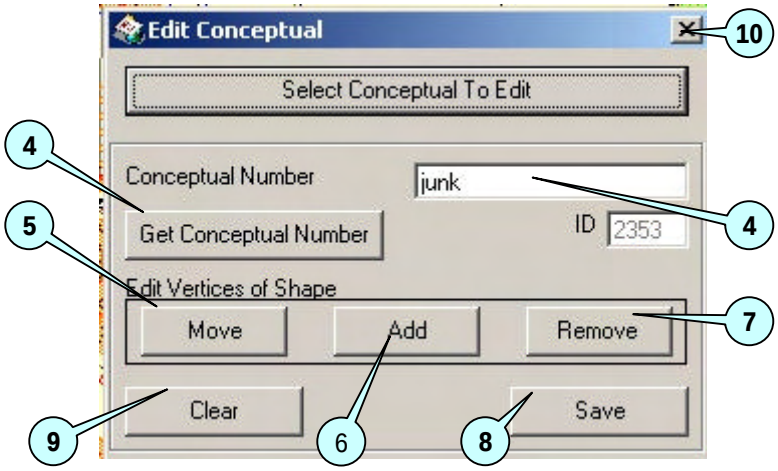
To remove a Conceptual.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Conceptual” option from the Tools list.
3. Select the “Remove” option from the Conceptual list. Your mouse pointer will become a cross symbol.
4. Double Left Mouse Click on the Conceptual you would like to remove. This will display the “Delete” pop up window.
5. Select the “OK” button to remove the selected Conceptual.
6. Select the “Cancel” button if you do not wish to remove the selected Conceptual.



To modify a Conceptual.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Conceptual” option from the Tools list.
3. Select the “Modify” option from the Conceptual list. This will display the “Edit Conceptual” pop up window. Select the Conceptual to Edit on the screen.
4. The user can enter a new Conceptual number in the box or select the “Get Conceptual Number” button to reselect from the database.
5. Select the “Move” button if you would like to move a point for the selected Conceptual. Then left mouse click the area on the screen you would like to move a point to. The system will select the closes point to be moved.
6. Select the “Add” button if you would like to add a point for the selected Conceptual. Then left mouse click the area on the screen you would like to add a point.
7. Select the “Remove” button if you would like to remove a point form the selected Conceptual. Then left mouse click the point on the screen you would like to remove.
8. Select the “Save” button to save the changes made to the selected Conceptual.
9. Select the “Clear” button if you would like to undo or cancel the changes to the selected Conceptual.
10. Select the “x” in the upper right corner of the “Edit Outline” pop up window to close the window.

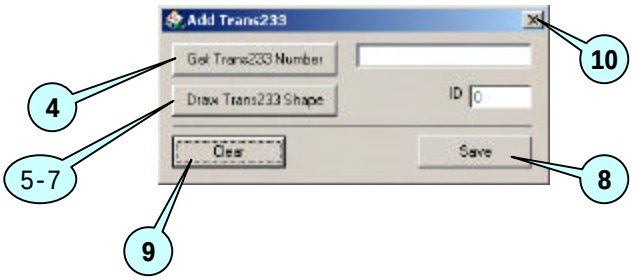


Trans233

The Trans233 Tool allows the user to add, remove, or modify Trans233s on the map screen.

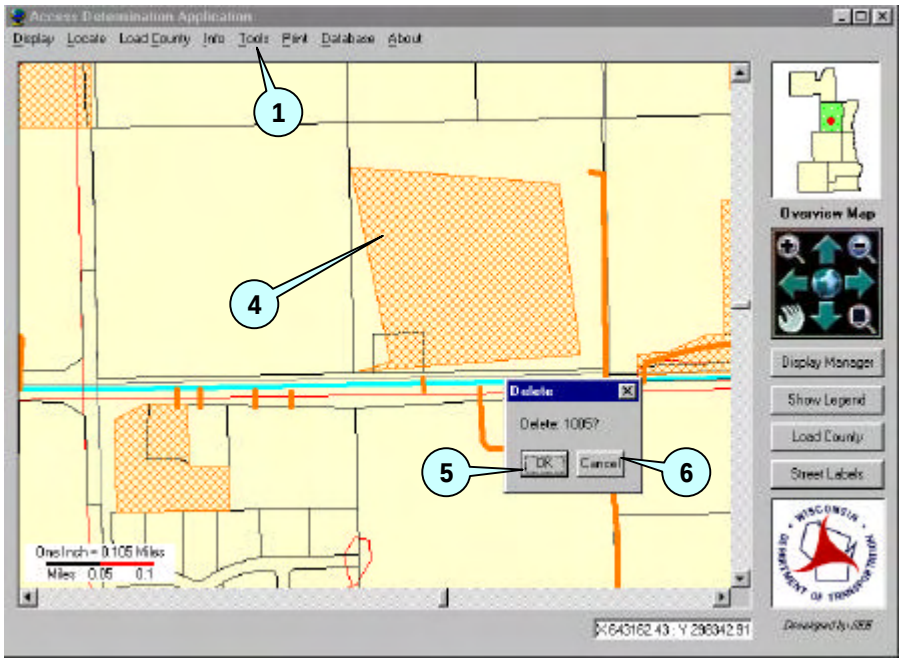
To add a Trans233.

11. Left Mouse Click the “Tools” menu option located at the top of the screen.
12. Select the “Trans233” option from the Tools list.
13. Select the “Add” option from the Trams233 list. This will display the “Add Trans233” pop up window.
14. Select the “Get Trans 233 Number” to automatically pick a number from the database or enter the Trans233 Number.
15. Select the “Draw Trans 233 Shape” button located in the lower left corner of the pop up window.
16. Left Mouse Click each point you would like to make for the Trans233 being added.
17. Double Left Mouse Click on the last point to close the Trans233 shape being added.
18. Select the “Save” button to save the new Trans233.
19. Select the “Clear” button if you would like to redraw or cancel the Trans233 added.
20. Select the “x” in the upper right corner of the “Add Trans233” pop up window to close the window.



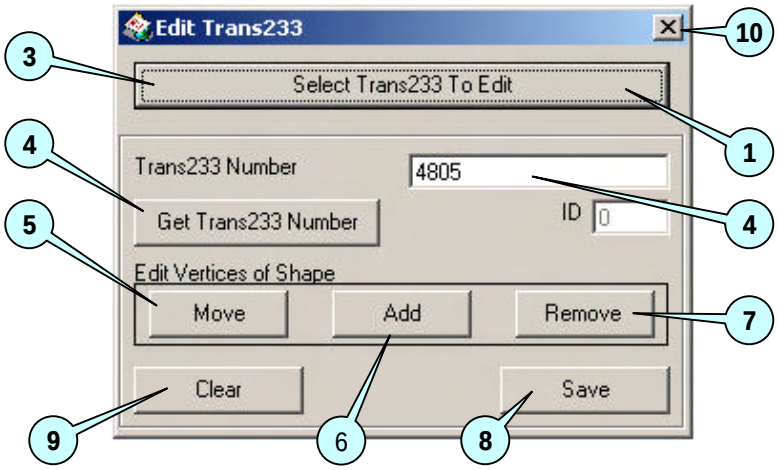
To remove a Trans233.

7. Left Mouse Click the “Tools” menu option located at the top of the screen.
8. Select the “Trans233” option from the Tools list.
9. Select the “Remove” option from the Trams233 list. Your mouse pointer will become a cross symbol.
10. Double Left Mouse Click on the Trans233 you would like to remove. This will display the “Delete” pop up window.
11. Select the “OK” button to remove the selected Trans233.
12. Select the “Cancel” button if you do not wish to remove the selected Trans233.



To modify a Trans233.

11. Left Mouse Click the “Tools” menu option located at the top of the screen.
12. Select the “Trans233” option from the Tools list.
13. Select the “Modify” option from the Trams233 list. This will display the “Edit Trans 233” pop up window. Select the Trans233 to Edit on the screen.
14. The user can enter a new Trans233 number in the box or select the “Get Trans233 Number” button to reselect from the database.
15. Select the “Move” button if you would like to move a point for the selected Trans233. Then left mouse click the area on the screen you would like to move a point to. The system will select the closes point to be moved.
16. Select the “Add” button if you would like to add a point for the selected Trans233. Then left mouse click the area on the screen you would like to add a point.
17. Select the “Remove” button if you would like to remove a point form the selected Trans233. Then left mouse click the point on the screen you would like to remove.
18. Select the “Save” button to save the changes made to the selected Trans233.
19. Select the “Clear” button if you would like to undo or cancel the changes to the selected Trans233.
20. Select the “x” in the upper right corner of the “Edit Outline” pop up window to close the window.

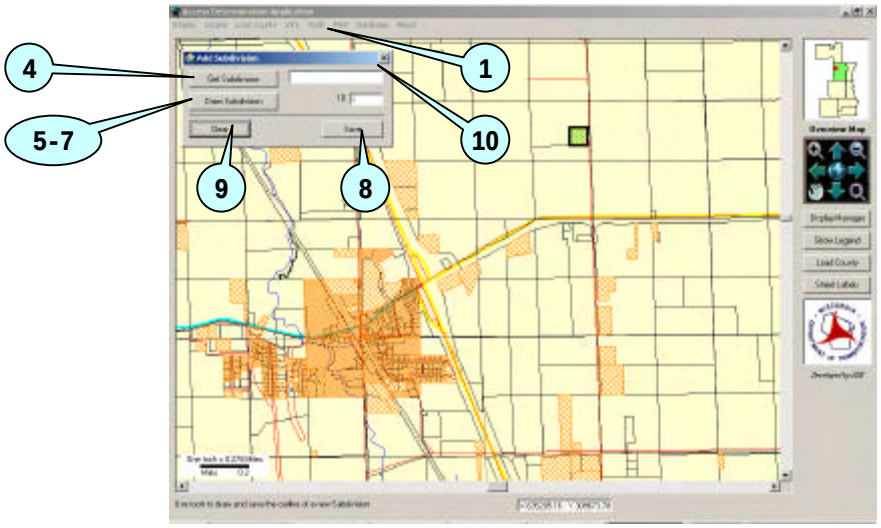


Subdivision

The Subdivision Tool allows the user to add, remove, or modify Subdivisions on the map screen. This process is done once the user has enter the Subdivision request into the Tracking System.

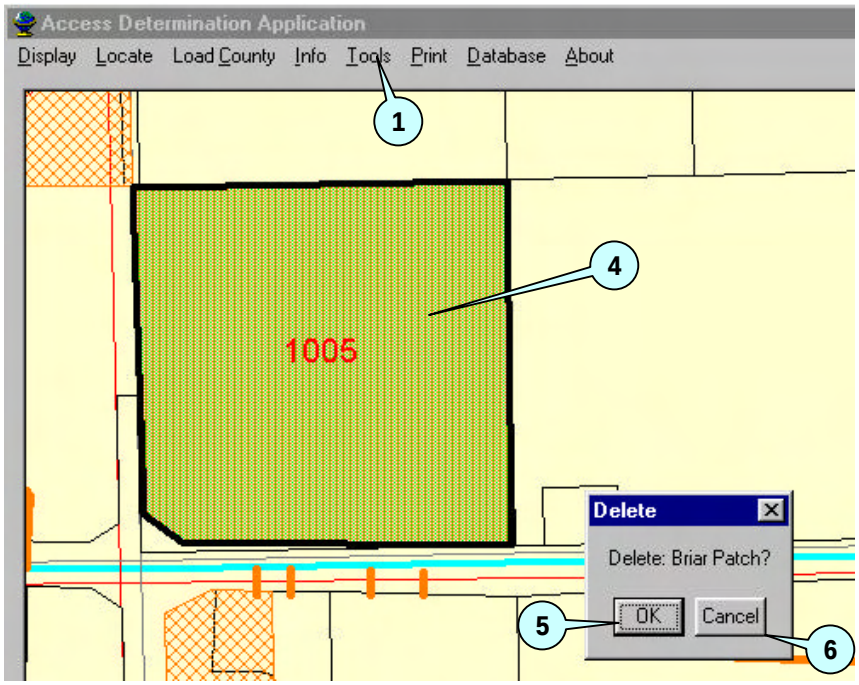
To add a Subdivision.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Subdivision” option from the Tools list.
3. Select the “Add” option from the Subdivision list. This will display the “Add Subdivision” pop up window.
4. Select the “Get Subdivision” button and pick from the database or enter the name into the box.
5. Select the “Draw Subdivision” button.
6. Left Mouse Click each point you would like to make for the Subdivision being added.
7. Double Left Mouse Click on the last point to close the Subdivision shape being added.
8. Select the “Save” button to save the new Subdivision.
9. Select the “Clear” button if you would like to redraw or cancel the Subdivision added.
10. Select the “x” in the upper right corner of the “Add Subdivision” pop up window to close the window.



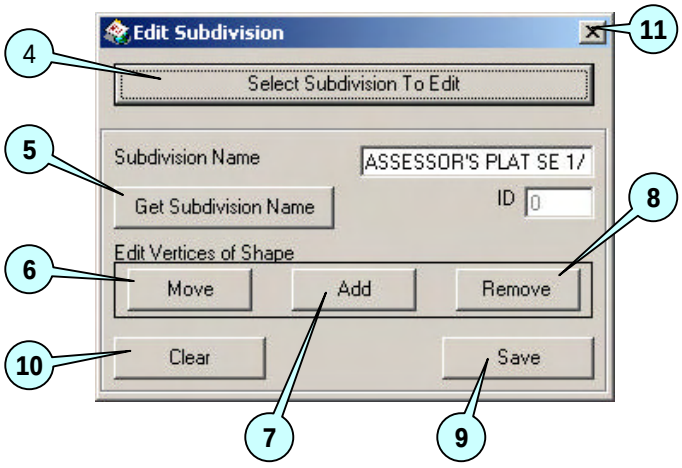
To remove a Subdivision.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Subdivision” option from the Tools list.
3. Select the “Remove” option from the Subdivision list. Your mouse pointer will become a cross symbol.
4. Left Mouse Click on the Subdivision you would like to remove. This will display the “Delete” pop up window.
5. Select the “OK” button to remove the selected Subdivision.
6. Select the “Cancel” button if you do not wish to remove the selected Subdivision.



To modify a Subdivision.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Subdivision” option from the Tools list.
3. Select the “Modify” option from the Subdivision list. This will display the “Edit Outline” pop up window.
4. Select the “Select Subdivision to Edit” button and select the subdivision on the screen.
5. The user can enter a new Subdivision Name or slect the “Get Subdivision Name” button and select it from the list
6. Select the “Move” button if you would like to move a point for the selected Subdivision. Then left mouse click the area on the screen you would like to move a point to. The system will select the closes point to be moved.
7. Select the “Add” button if you would like to add a point for the selected Subdivision. Then left mouse click the area on the screen you would like to add a point.
8. Select the “Remove” button if you would like to remove a point form the selected Subdivision. Then left mouse click the point on the screen you would like to remove.
9. Select the “Save” button to save the changes made to the selected Subdivision.
10. Select the “Clear” button if you would like to undo or cancel the changes to the selected Subdivision.
11. Select the “x” in the upper right corner of the “Edit Outline” pop up window to close the window.

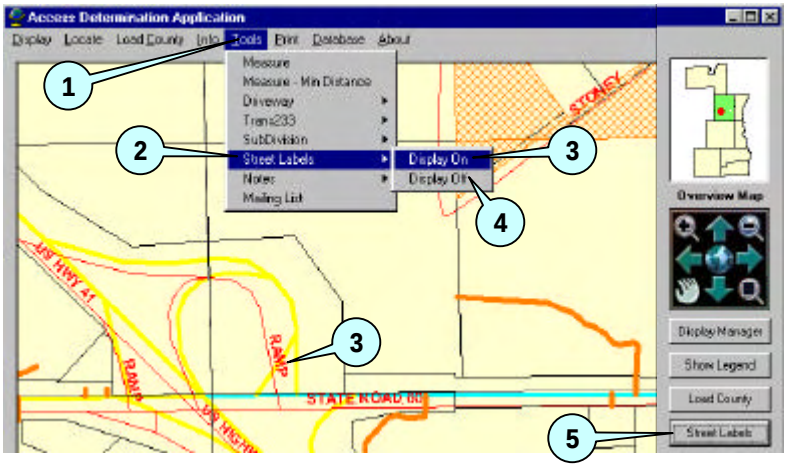


Street Labels

The Street Labels function allows toggling the names of the streets on and off. To view the labels it will be necessary to zoom in close enough to distinguish the actual streets.

To turn Street Labels on and off.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Street Labels” option from the Tools list.
3. Select the “Display On” option from the Street Labels list. This will display the street labels on the map screen.
4. Select the “Display Off” option from the Street Labels list. This will remove the street labels from the map screen.
5. You may also select the “Street Labels” button located at the right of the map screen.

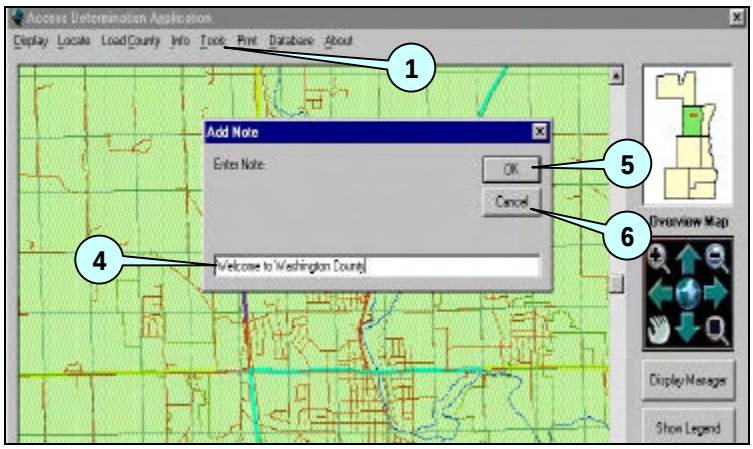


Notes

The Notes function allows the user to Add, Delete, or Move a comment or label at a specific location.

To add Notes.

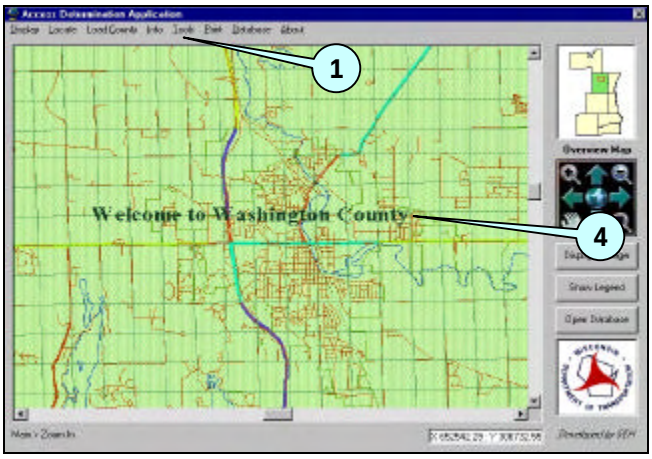
1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Notes” option from the Tools list.
3. Select the “Add” option from the Notes list. This will display the “Add Notes” pop up window.
4. Enter the Note you would like to add into the textbox on the “Add Note” pop up winow.
5. Select the “OK” button to add the note to the map screen.
6. Select the “Cancel” button to cancel the changes of adding a note entered.



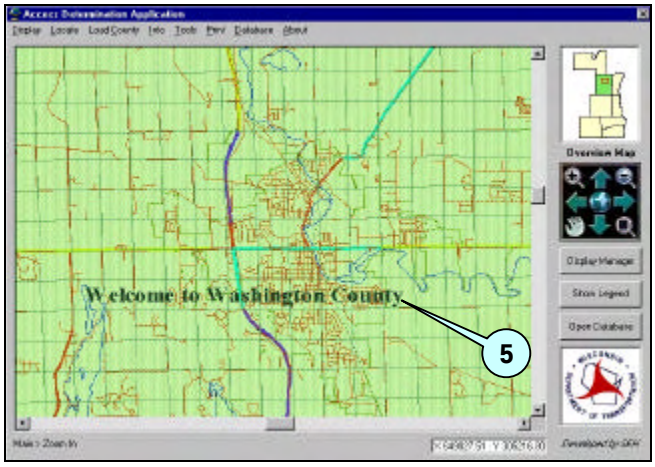
To move Notes.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Notes” option from the Tools list.
3. Select the “Move” option from the Notes list. Your mouse pointer will become a cross symbol.
4. Left Mouse Click the note you would like to move.
5. Left Mouse Click the new location to which you would like to move the note.

Before



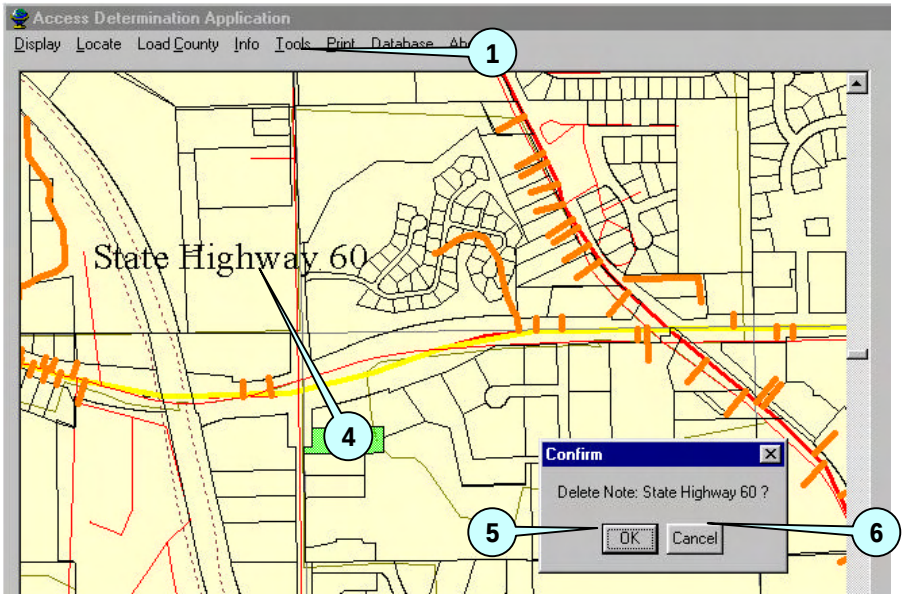
After



Note You may continue to select new locations for the selected note until another command has been chosen or until you right mouse click.

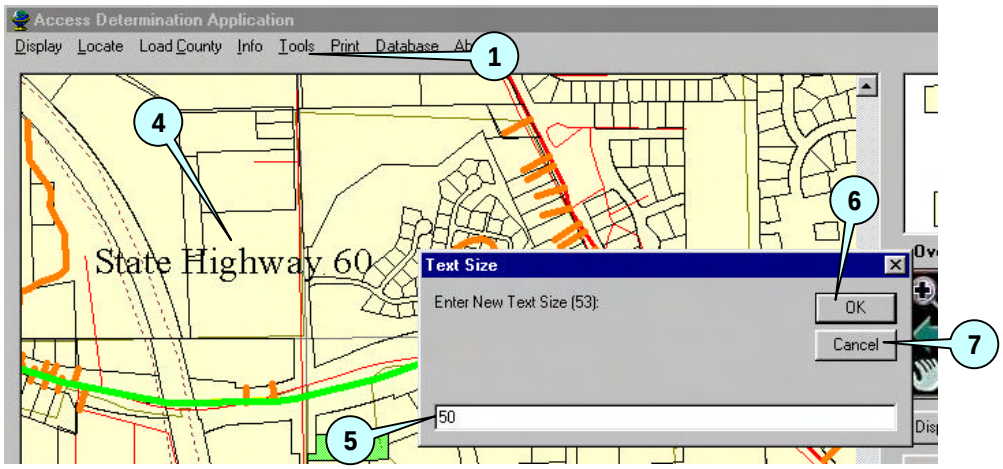
To delete Notes.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Notes” option from the Tools list.
3. Select the “Delete” option from the Notes list. Your mouse pointer will become a cross symbol.
4. Left Mouse Click the note you would like to delete. This will display the “Delete” pop up window.
5. Select the “OK” button to remove the selected note.
6. Select the “Cancel” button if you do not wish to remove the selected note.



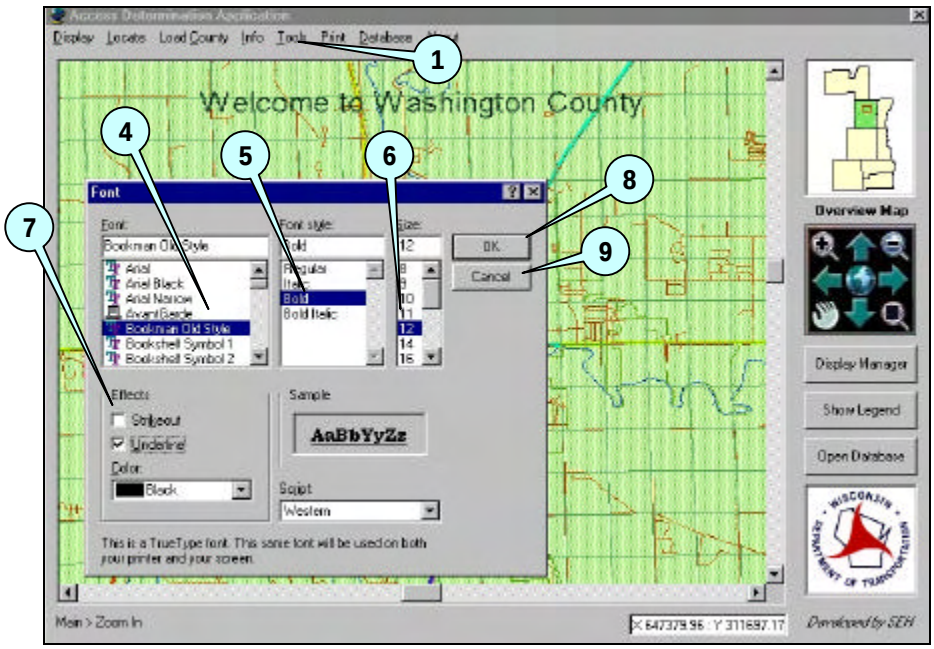
To change size of Notes.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Notes” option from the Tools list.
3. Select the “Change Size” option from the Notes list.
4. Left Mouse Click the note for which you would like to change the size. This will display then “Text Size” pop up window.
5. Enter the new text size into the text box on the “Text Size” pop up window.
6. Select the “OK” button to save size change to the selected note.
7. Select the “Cancel” button if you do not wish to change the size of the selected note.



To change the font of Notes.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Notes” option from the Tools list.
3. Select the “Change Font” option from the Notes list. This with display the “Font” pop up window.
4. Left Mouse Click the “Font” from the list.
5. Select the “Font Style” from the list.
6. Select the “Size” from the list.
7. You may also select from the options under the “Effects” box.
8. Select the “OK” button to keep the changes made.
9. Select the “Cancel” button to cancel the changes requested.



Note Any changes that are made will apply to all Notes that are on the screen and will also apply to new notes as well (unless the style is changed).

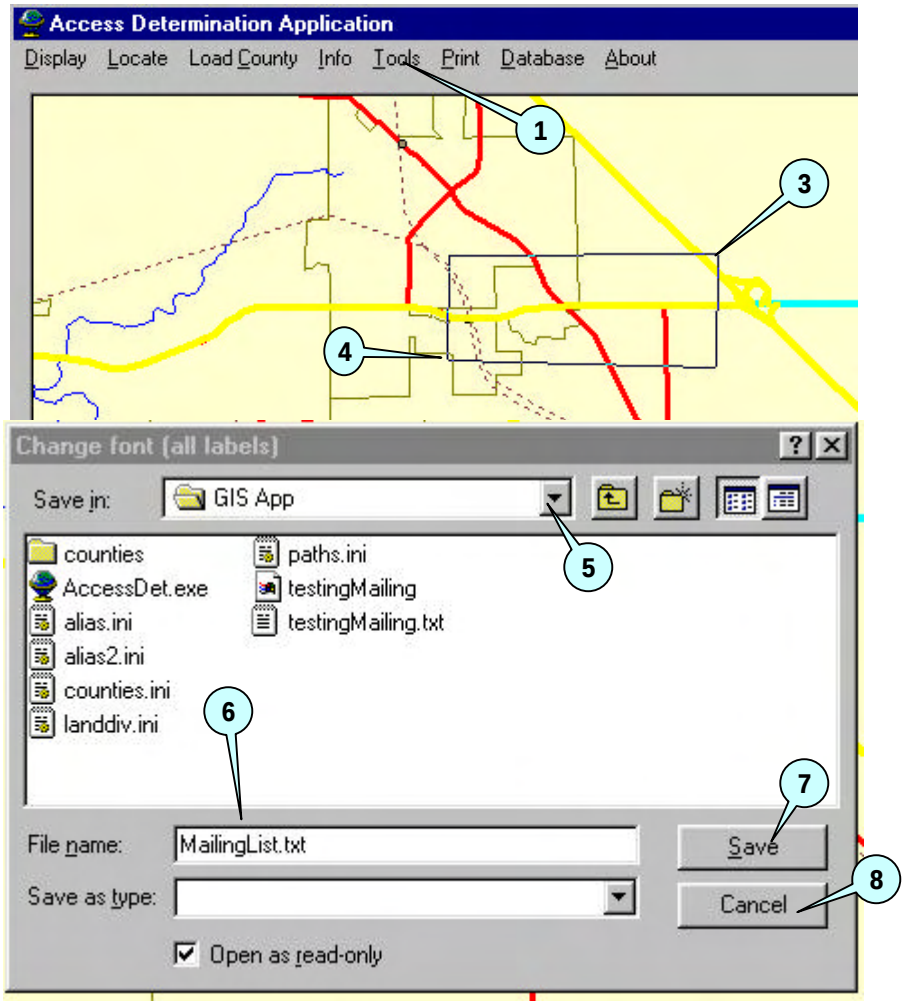
To clear all Notes.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Notes” option from the Tools list.
3. Select the “Clear All” option from the Notes list. This with remove all notes from the map screen.

Mailing List

To add Notes.

1. Left Mouse Click the “Tools” menu option located at the top of the screen.
2. Select the “Mailing” option from the Tools list.
3. Left Mouse Click each point you would like to include the range of owners that are to be included in the mailing list.
4. Double Left Mouse Click to complete the range.
5. Select the location you would like to save the list of names created.
6. Enter the “File Name” you would like to save the mailing list as with an extention of “.txt”.
7. Select the “Save” button to save the list.
8. Select the “Cancel” button to cancel the save action.

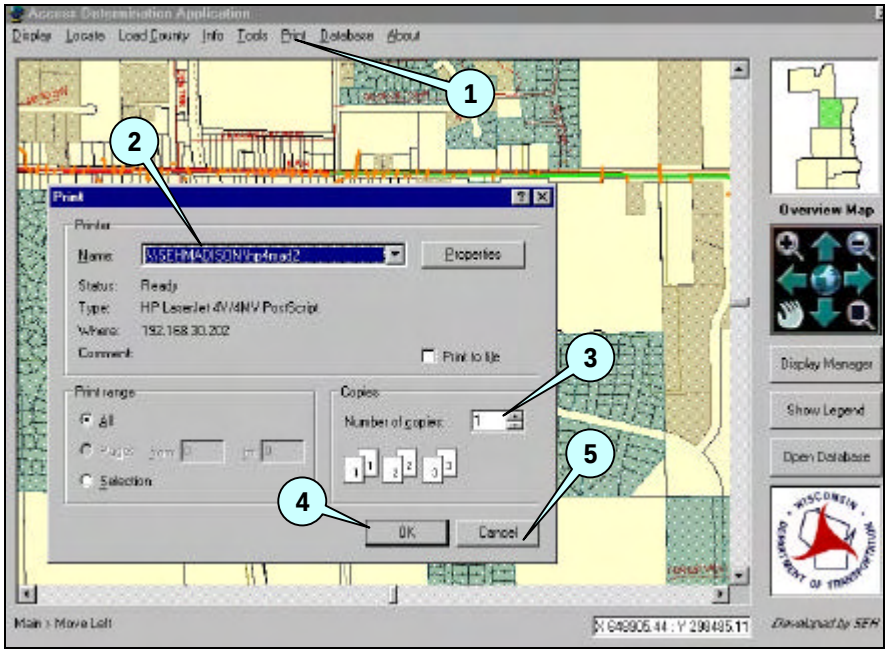


Print

If connected to a printer, this function will allow printing of the information that is currently displayed on the screen. This function utilizes the default printer setup on the computer.

To print current map screen view.

1. Left Mouse Click the “Print” menu option located at the top of the screen. The “Print” pop up window will be displayed.
2. Select the “Name” of the print to which you would like to print.
3. Select the “Number of Copies” if you would like to print more than one copy of the map screen.
4. Select the “OK” button to print map screen.
5. Select the ‘Cancel” button to cancel the print action.



User's Guide

With examples from District 2

Access Determination Tracking System

Access Determination Tracking System

Written by
Sandra Duerst

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CHAPTER 1

Adding and Editing Lists Menu

When you want to add or edit data in the Tracking System, the Lists Menu allows you to set the options to most all drop down boxes through out the system. To use this feature you must enter a password before the system will allow you to enter the Lists Menu Screen.

Note If the Lists Menu are not entered or modified to fit the standards of the users needs the system will not work properly for the user.

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Open Lists Menu

On the Main Menu of the Tracking System select the “Lists Menu” button. The system will prompt you for a password before you will be allowed to enter this screen.

Note If you do not know the password and are suppose to have access to this area, please see your administrator.

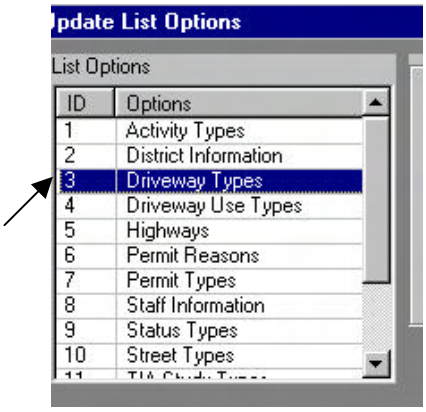
Selecting a List Option

On the Lists Menu Screen you will notice there are two list boxes and some button options. You will need to select which list option you would like to work with before you can add, remove, or edit the existing list.

To select an option

1. Find which list option you would like to work with in the “List Options” list box.
2. Left Mouse Click on the item of choice.

   This will display all the records of the “List Options” selected in the “Records List “ list box.



Once you have chosen the list option that you would like to work with, a gray box is displayed at the right of the “List Options” list box. This gray box is where you will add, remove, or edit the existing list.

Note Please refer to the “Adding Records”, “Editing Records” and “Removing Records” sections of this chapter for details on how to do these functions.

Adding Records

You will need to select which list option you would like before you can add a new record.

Once you have chosen the list option that you would like to work with, a gray box is displayed to the right of the “List Options” list box. This gray box is where you will add a new record.

To add a new record

1. Find which list option you would like to work with in the “List Options” list box.
2. Select the “Add New List Option” button, which is located below the gray box.
3. You may now add the new information to the blank fields shown in the gray box.

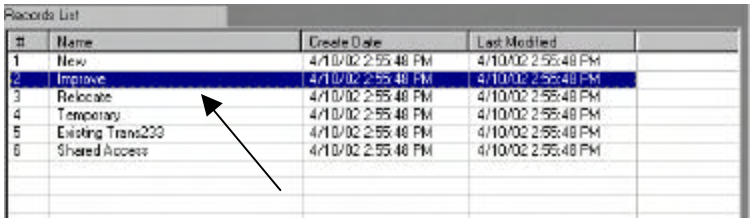
Editing Records

You will need to select which list option you would like before you can edit a record’s information.

Once you have chosen the list option that you would like to work with, a gray box is displayed to the right of the “List Options” list box. This gray box is where you will edit a record.

To edit a record

1. Find which list option you would like to work with in the “List Options” list box.
2. Left Mouse Click the record you would like to modify from the “Records List” list box.



3. You may now edit the information of the fields shown in the gray box.

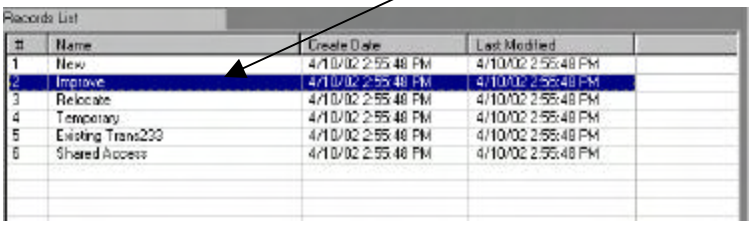
Removing Records

You will need to select which list option you would like before you can remove a record.

Once you have chosen the list option that you would like to work with, a gray box is displayed to the right of the “List Options” list box. This gray box is where you will remove a record.

To remove a record

1. Find which list option you would like to work with in the “List Options” list box.
2. Left Mouse Click the record you would like to remove from the “Records List” list box.



3. Select the “Remove List Option” button, which is located below the gray box.

   The record that was selected should no longer be listed in the “Records List” list box and the gray box should now display the next record in the list.

Note If the record you have selected is associated or being used by a record on the Entries Screen you cannot delete the selected record at this time. You will need to remove the associations, to this list option, through out all the records in the system before you may continue with this process.

Moving between Records

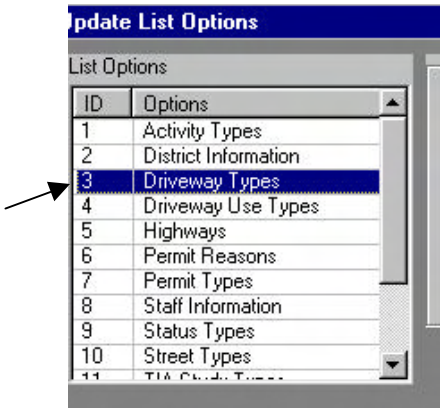
On the Lists Menu Screen you will notice there are two list boxes and some button options. You will need to select which list option you would like to work with before you can move between records of an existing list.

To move between records

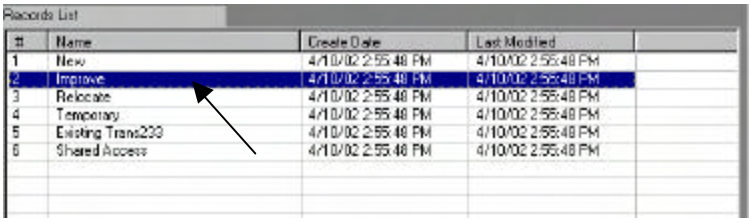
1. Find which list option you would like to work with in the “List Options” list box.

2. Left Mouse Click on the item of choice.

   This will display all the records of the “List Options” selected in the “Records List “ list box.



3. Left Mouse Click the record you would like to move to in the “Records List” list box.



Once you have selected the record from the “Records List” list box, the gray box will display the information of the selected record.

Open Letter Templates

On the Main Menu of the Tracking System select the “Lists Menu” button. The system will prompt you for a password before you will be allowed to enter this screen.

On the Lists Menu Screen you will notice there are two button options in the lower left corner of the Screen. You will need to select the button option “Letter Types” to open the Letter Templates Screen.

Note If you do not know the password and are suppose to have access to this area, please see your administrator.

Adding Records

To add a new record

1. Open the Letter Templates Screen
2. Select the “Add New Letter” button located at the top, middle of the screen.
3. Enter the Letter Name and Body information
4. Select the “Save” button located at the top, right of the screen.

Editing Records

To edit a record

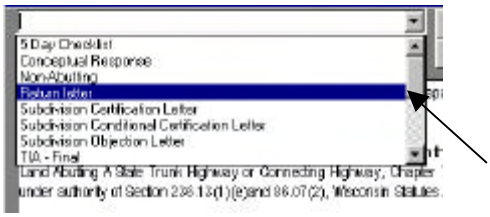
1. Open the Letter Templates Screen
2. Use the drop down box to select the letter template you wish to edit.

3. Edit the information in the body of the letter template selected.
4. Select the “Save” button located at the top, right of the screen, when you are done editing the selected letter.

Removing Records

To remove a record

1. Open the Letter Templates Screen
2. Use the drop down box to select the letter template you wish to remove.



3. Select the "Delete Letter" button located at the top, middle of the screen.

Note If the record you have selected is associated or being used by a record on the Entries Screen you cannot delete the selected record at this time. You will need to remove the associations, to this list option, through out all the records in the system before you may continue with this process.

Moving between Records

To move between records

1. Open the Letter Templates Screen
2. Use the drop down box to select the letter template you would like to move to.

Open Form Templates

On the Main Menu of the Tracking System select the "Lists Menu" button. The system will prompt you for a password before you will be allowed to enter this screen.

On the Lists Menu Screen you will notice there are two button options in the lower left corner of the Screen. You will need to select the button option "Form Types" to open the Form Templates Screen.

Note If you do not know the password and are suppose to have access to this area, please see your administrator.

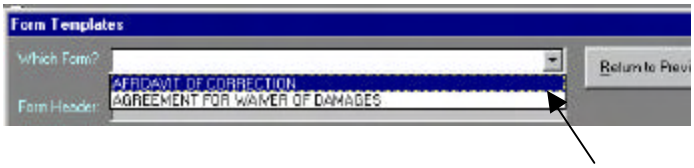
Editing Records

On the Form Templates Screen you will notice that once you have selected a form template from the drop down box, certain paragraph fields are grayed out. The program does not look for the fields that are grayed out when producing the finished forms that are being created for the specified Log Entry.
You will also notice that some forms have more than one paragraph part. This is due to the information that is automatically pulled from the specified Log Entry.

Example (at the beginning of this phrase) "County Name" (automatically pulled) "Paragraph Part 1" - County, State of Wisconsin, contained the following error (if more space is needed, please attach addendum) (between Part 1 and Part 2) "Highway" (automatically pulled) "Paragraph Part 2" - Affiant make this Affidavit for the purpose of correcting the above document as follows (if more space is needed, please attached addendum):

To edit a record

1. Open the Form Templates Screen
2. Use the drop down box to select the form template you wish to edit.

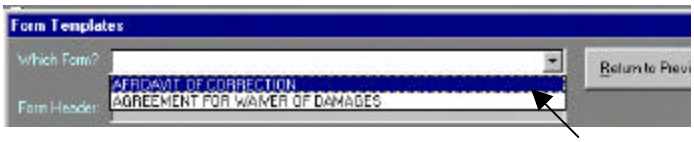


5. Edit the information in the body of the form template selected.
6. Select the "Return to Previous" button located at the top, right of the screen, when you are done editing the selected form.

Moving between Records

To move between records

1. Open the Form Templates Screen
2. Use the drop down box to select the form template you would like to move to.



Sorting the List Boxes

To sort the list box

1. Left Mouse Click the column name of the list box.

Tip You can sort the list by more than one column.

How If you have a column named “First Name” and another column named “Last Name” and you would like to sort them by Last Name then First name you will want to:

(1) Select the First Name column

(2) Identify if you want the column to be sorted in “ascending” or “descending” order.

(3) You will then want to select the Last Name column

(4) Identify if you want the column to be sorted in “ascending” or “descending” order.

Note If the column is already in ascending order it will be put in descending order when you left mouse click the column name.

CHAPTER 2

Adding and Editing Lists of Contacts

This chapter will explain how to create Contacts for the Tracking System. The Contacts that are created are then used to help the users to create letters and forms that are then sent to the Contacts.

Chapter Contents

OPEN LISTS OF CONTACTS 11
ADDING RECORDS 11
EDITING RECORDS 11
REMOVING RECORDS 11
MOVING BETWEEN RECORDS 12
FINDING A SPECIFIC RECORD 12
SORTING THE LIST BOX 13

Open Lists of Contacts

On the Main Menu of the Tracking System select the “List of Contacts” button. If you are on the Log Entries Screen select the “Open Contact List” link.

Adding Records

▶ To add a new record

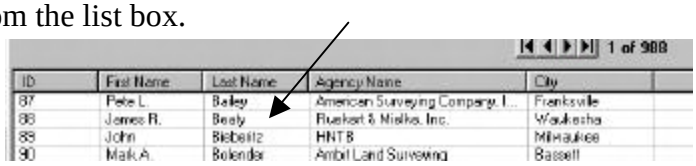
1. Select the “Add” button, which is located at the middle, right of the screen.
2. You may now add the new information to the blank fields shown on the screen.

Note The fields that are highlighted in light blue will only accept a number.

Editing Records

▶ To edit a record

1. Find which person you would like to work with from the list box, located at the bottom of the screen.
2. Left Mouse Click the record you would like to modify from the list box.

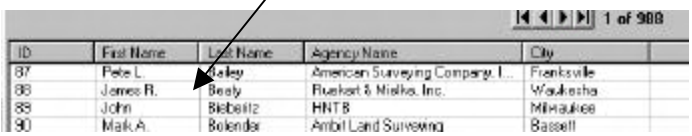


3. You may now edit the information of the fields shown on the screen.

Removing Records

▶ To remove a record

1. Find which person you would like to remove from the list box, located at the bottom of the screen.
2. Left Mouse Click the record you would like to remove from the list box.



3. Select the “Remove” button, which is located at the middle, right of the screen.

The record that was selected should no longer be listed in the list box and the fields should now display the next record in the list.

Note If the record you have selected is associated or being used by a record on the Entries Screen you cannot delete the selected record at this time. You will need to remove the associations, to this contact, through out all the records in the system before you may continue with this process.

Moving between Records

To move between records

1. Find which person you would like to work with from the list box, located at the bottom of the screen.
2. Left Mouse Click on the item of choice.

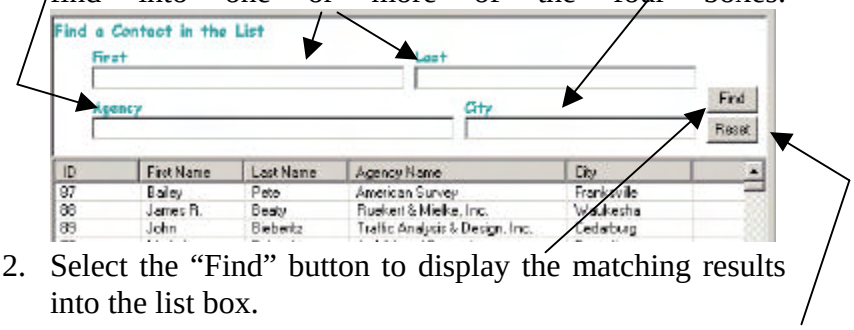
Or

3. You can also move between records by selecting the navigation buttons located at the middle, right of the screen.

Finding a Specific Record

To find a specific record

1. Enter the first few letters of the person you are trying to find into one or more of the four boxes.



2. Select the “Find” button to display the matching results into the list box.
3. Select the “Reset” button to display the full list of contacts in the list box.

Sorting the List Box

To sort the list box

1. Left Mouse Click the column name of the list box.

Tip You can sort the list by more than one column.

How If you have a column named “First Name” and another column named “Last Name” and you would like to sort them by Last Name then First name you will want to:

(1) Select the First Name column

(2) Identify if you want the column to be sorted in “ascending” or “descending” order.

(3) You will then want to select the Last Name column

(4) Identify if you want the column to be sorted in “ascending” or “descending” order.

Note If the column is already in ascending order it will be put in descending order when you left mouse click the column name.

CHAPTER 3

Adding and Editing Log Entries

This chapter will explain how to add and edit information on and associated with a Log Entry in the Tracking System.

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ADD LOG ENTRIES 16
EDITING RECORDS 16
MOVING BETWEEN RECORDS 17
ADD ACCESS REQUEST 17
EDITING RECORDS 18
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ADD TO DO LIST RECORDS 41
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Add Log Entries

On the Main Menu of the Tracking System select the “Log Entries” button to open the Log Entries Screen.

To add a new Log Entry

1. Open the Log Entries Screen
2. Select the “Add New Entry” button located at the top, left of the screen.
3. Fill in the fields that are located in the upper portion of the screen, above the tabs.

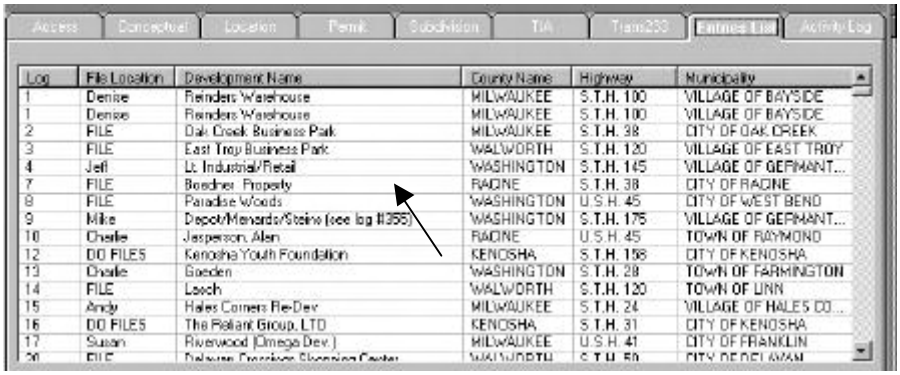
Note You will always want to fill in the County Name, Highway and Municipality of an entry. These three pieces of information are used extensively elsewhere in the Tracking System.

Editing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Entries List” tab will display a list of all the log entries currently in the Tracking System. With this list you are able to select a log and it will then be displayed in the fields on the Log Entries Screen.

To edit a record

1. Locate the Log Entry you would like to work with by selecting the “Entries List” tab located in the middle of the screen.
2. Left Mouse Click the record you would like to modify from the list box.



Or

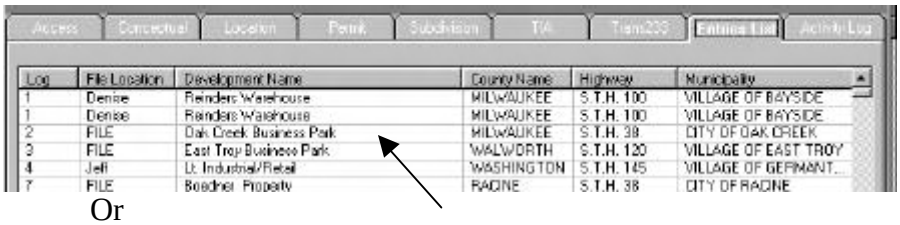
3. You may also locate a Log Entry by selecting the navigation buttons located at the middle, right of the screen.

4. You may now edit the information of the fields shown on the screen.

Moving between Records

To move between records

1. Select the “Entries List” tab located in the middle of the screen.
2. Left Mouse Click the record you would like to move to from the list box.



Or

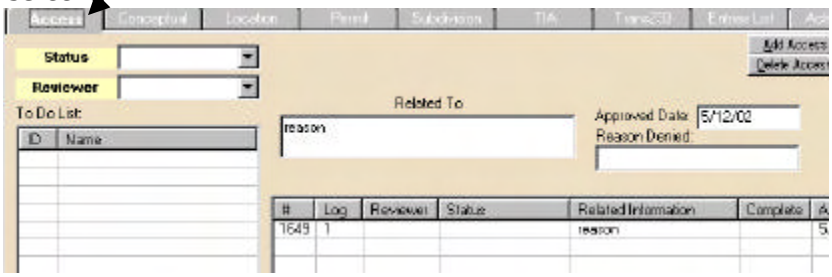
3. You may also move between records by selecting the navigation buttons located at the middle, right of the screen.

Add Access Request

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Access” tab will display a list of all the Access Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To add Access Request

1. Locate the Log Entry that is to be associated with the Access Request.
2. Select the “Access” tab located in the middle of the screen.



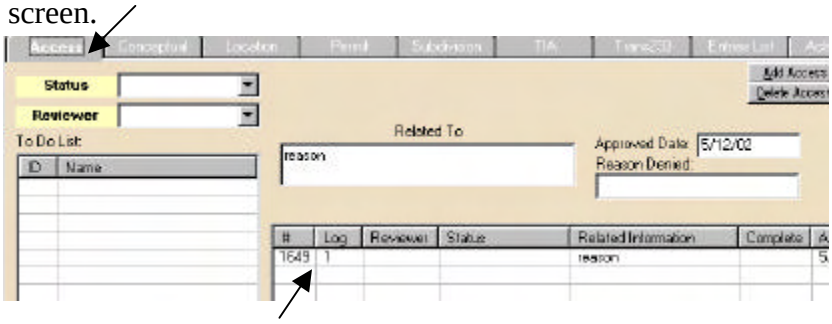
3. Select the “Add Access Request” button located at the right of the tab.
4. You may now enter the information into the blank fields located on the tab.

Editing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Access” tab will display a list of all the Access Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To edit a record

1. Locate the Log Entry associated with the Access Request.
2. Select the “Access” tab located in the middle of the screen.



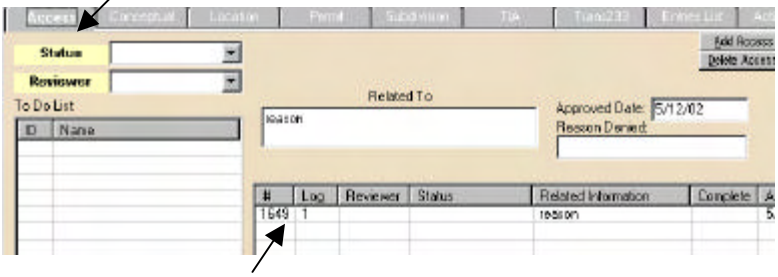
3. Left Mouse Click the record you would like to modify from the list box, located at the bottom of the tab.
4. You may now edit the information of the fields shown on the tab.

Removing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Access” tab will display a list of all the Access Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To remove a record

1. Locate the Log Entry associated with the Access Request.
2. Select the “Access” tab located in the middle of the screen.



3. Left Mouse Click the record you would like to remove from the list box, located at the bottom of the tab.
4. Select the “Remove Access Request” button located at the right of the tab.

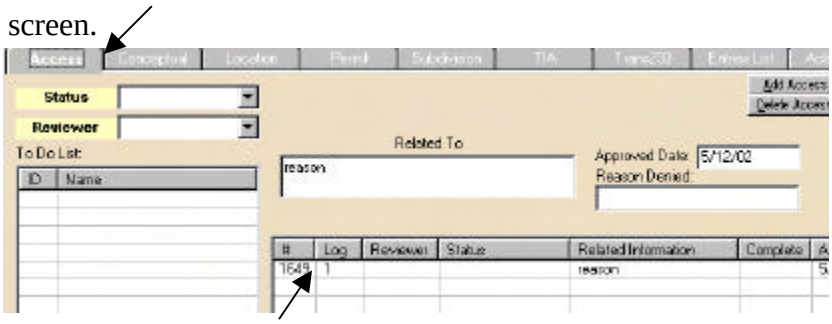
   The record that was selected should no longer be listed in the list box and the fields should now display the next record in the list.

Moving between Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Access” tab will display a list of all the Access Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To move between records

1. Select the “Access” tab located in the middle of the screen.



2. Left Mouse Click the record you would like to move to from the list box, located at the bottom of the tab.

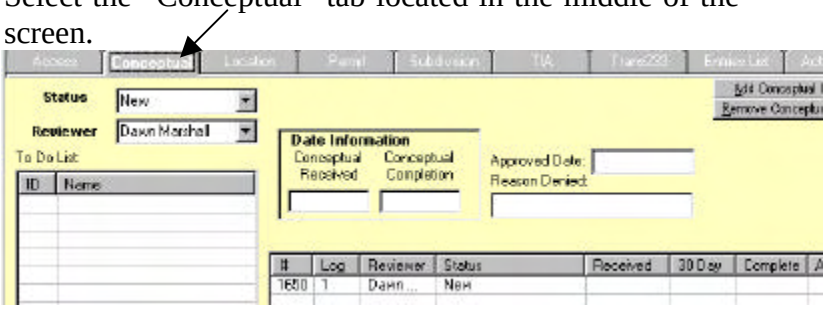
Add Conceptual Request

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Conceptual” tab will display a list of all the Conceptual Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To add Conceptual Request

1. Locate the Log Entry that is to be associated with the Conceptual Request.

2. Select the “Conceptual” tab located in the middle of the screen.



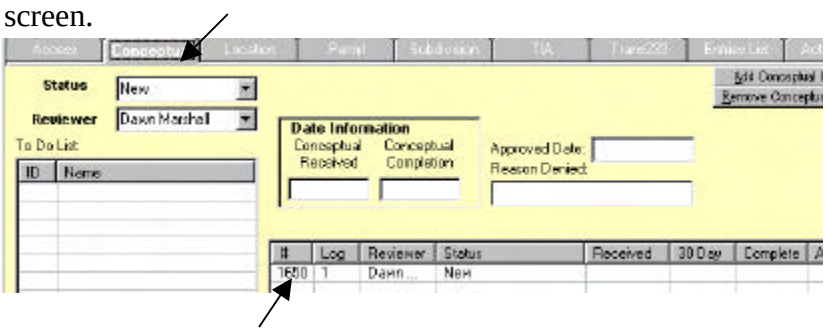
3. Select the “Add Conceptual Request” button located at the right of the tab.
4. You may now enter the information into the blank fields located on the tab.

Editing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Conceptual” tab will display a list of all the Conceptual Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To edit a record

1. Locate the Log Entry associated with the Conceptual Request.
2. Select the “Conceptual ” tab located in the middle of the screen.



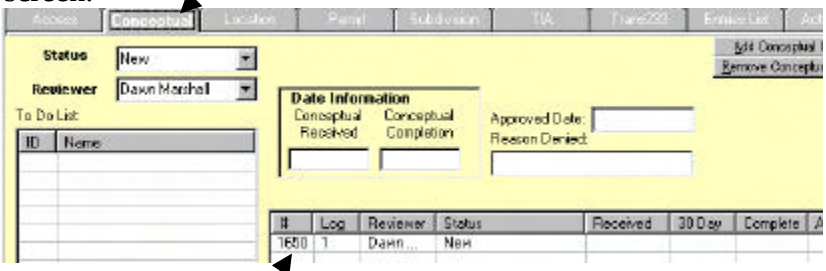
3. Left Mouse Click the record you would like to modify from the list box, located at the bottom of the tab.
4. You may now edit the information of the fields shown on the tab.

Removing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Conceptual” tab will display a list of all the Conceptual Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To remove a record

1. Locate the Log Entry associated with the Conceptual Request.
2. Select the “Conceptual ” tab located in the middle of the screen.



3. Left Mouse Click the record you would like to remove from the list box, located at the bottom of the tab.
4. Select the “Remove Conceptual Request” button located at the right of the tab.

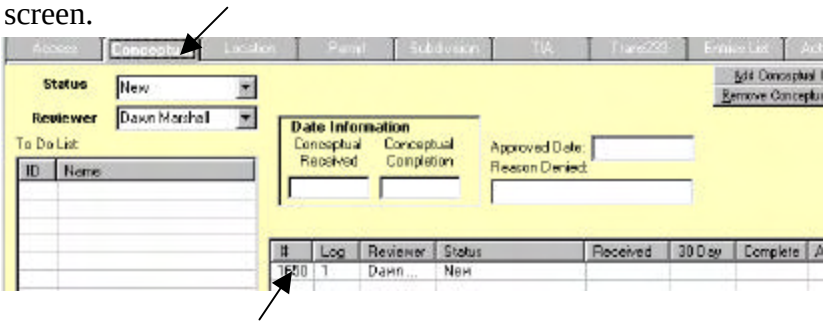
   The record that was selected should no longer be listed in the list box and the fields should now display the next record in the list.

Moving between Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Conceptual” tab will display a list of all the Conceptual Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To move between records

1. Select the “Conceptual ” tab located in the middle of the screen.



2. Left Mouse Click the record you would like to move to from the list box, located at the bottom of the tab.

Add RPs

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Location” tab will display a list of all the RPs. These records are associated with the Log Entry displayed at the top of the screen.

To add RPs

1. Locate the Log Entry that is to be associated with the RP.
2. Select the “Location” tab located in the middle of the screen.

3. Select the “Add RP” button located at the top, left of the “RP Information” box.
4. You may now enter the information into the blank fields located in the “RP Information” box.

Editing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Location” tab will display a list of all the RPs that are associated with the Log Entry displayed at the top of the screen.

To edit a record

1. Locate the Log Entry associated with the RP.
2. Select the “Location” tab located in the middle of the screen.

3. Left Mouse Click the record you would like to modify from the list box, located at the bottom of the “RP Information” box.

Or

4. You may also locate a record by selecting the navigation buttons located at the left of the “RP Information” box.

5. You may now edit the information of the fields shown in the “RP Information” box.

Removing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Location” tab will display a list of all the RPs. These records are associated with the Log Entry displayed at the top of the screen.

To remove a record

1. Locate the Log Entry associated with the RP.
2. Select the “Location” tab located in the middle of the screen.

3. Left Mouse Click the record you would like to remove from the list box, located at the bottom of the “RP Information” box.

4. Select the “Remove RP” button located at the top, left of the “RP Information” box.

   The record that was selected should no longer be listed in the list box and the fields should now display the next record in the list.

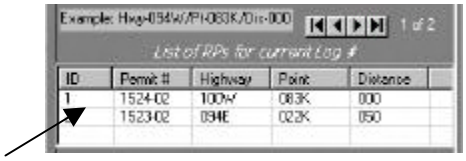
Moving between Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Location” tab will display a list of all the RPs. These records are associated with the Log Entry displayed at the top of the screen.

To move between records

1. Select the “Location” tab located in the middle of the screen.

2. Left Mouse Click the record you would like to move to from the list box, located at the bottom of the “RP Information” box.



Or

3. You may also move between records by selecting the navigation buttons located at the left of the “RP Information” box.

Add Legal Location

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Location” tab will display the first record of the Legal Location. These records are associated with the Log Entry displayed at the top of the screen.

To add Legal Location

1. Locate the Log Entry that is to be associated with the Legal Location.
2. Select the “Location” tab located in the middle of the screen.

3. Select the “Add Legal Location” button located at the bottom left of the tab.
4. You may now enter the information into the blank fields and toggle buttons located on the tab.

Note The fields that are inside the “RP Information” box and the “Government Lot Information” box are not part of the Legal Location Entry.

Editing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Location” tab will display the first record of the Legal Location. These records are associated with the Log Entry displayed at the top of the screen.

To edit a record

1. Locate the Log Entry associated with the Legal Location.
2. Select the “Location” tab located in the middle of the screen.

3. Locate the record you would like to modify by selecting the navigation buttons located at the bottom, left of the tab.

4. You may now edit the information into the blank fields and toggle buttons located on the tab.

Note The fields that are inside the “RP Information” box and the “Government Lot Information” box are not part of the Legal Location Entry.

Removing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Location” tab will display the first record of the Legal Location. These records are associated with the Log Entry displayed at the top of the screen.

To remove a record

1. Locate the Log Entry associated with the Legal Location.
2. Select the “Location” tab located in the middle of the screen.

3. Locate the record you would like to remove by selecting the navigation buttons located at the bottom, left of the tab.

4. Select the “Remove Legal Location” button located at the bottom, left of the tab.

Moving between Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Location” tab will display the first record of the Legal Location. These records are associated with the Log Entry displayed at the top of the screen.

To move between records

1. Select the “Location” tab located in the middle of the screen.

2. Locate the record you would like to move to by selecting the navigation buttons located at the bottom, left of the tab.

Add Government Lots

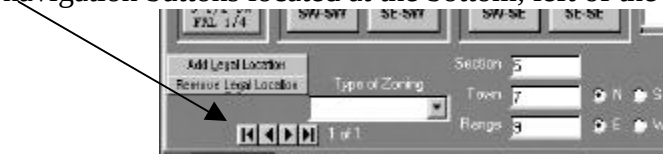
The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Location” tab will display a list of all the Government Lots. These lots are associated with the Legal Location currently displayed at the left of the “Government Lot Information” box.

To add Government Lots

1. Locate the Log Entry associated with the Legal Location.

2. Select the “Location” tab located in the middle of the screen.

3. Locate the Legal Location that is to be associated with the Government Lot.
4. Select the Legal Location Entry by selecting the navigation buttons located at the bottom, left of the tab.



5. Select the “Add Gov’t Lot” button located at the left of the “Government Lot Information” box.
6. You may now enter the information into the blank field located in the “Government Lot Information” box.

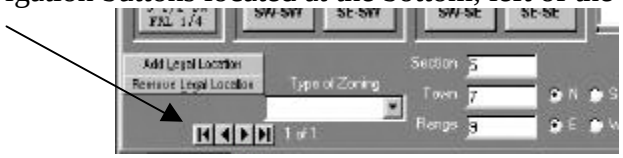
Editing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Location” tab will display a list of all the Government Lots. These lots are associated with the Legal Location currently displayed at the left of the “Government Lot Information” box.

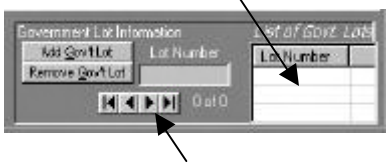
To edit a record

1. Locate the Log Entry associated with the Legal Location.
2. Select the “Location” tab located in the middle of the screen.

3. Locate the Legal Location that is associated with the Government Lot.
4. Select the Legal Location Entry by selecting the navigation buttons located at the bottom, left of the tab.



5. Left Mouse Click the record you would like to modify from the list box located at the right of the “Government Lot Information” box.



Or

6. You may also locate a record by selecting the navigation buttons located at the bottom of the “Government Lot Information” box.
7. You may now edit the information of the field shown in the “Government Lot Information” box.

Removing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Location” tab will display a list of all the Government Lots. These lots are associated with the Legal Location currently displayed at the left of the “Government Lot Information” box.

To remove a record

1. Locate the Log Entry associated with the Legal Location.
2. Select the “Location” tab located in the middle of the screen.

3. Locate the Legal Location that is associated with the Government Lot.
4. Select the Legal Location Entry by selecting the navigation buttons located at the bottom, left of the tab.

5. Left Mouse Click the record you would like to remove from the list box located at the bottom of the “Government Lot Information” box.

6. Select the “Remove Gov’t Lot” button located at the left of the “Government Lot Information” box.

   The record that was selected should no longer be listed in the list box and the fields should now display the next record in the list.

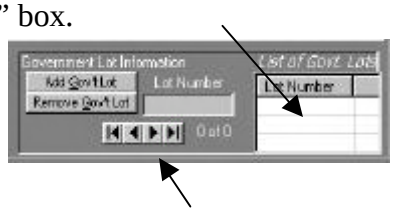
Moving between Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Location” tab will display a list of all the Government Lots. These lots are associated with the Legal Location currently displayed at the left of the “Government Lot Information” box.

To move between records

1. Select the “Location” tab located in the middle of the screen.

2. Left Mouse Click the record you would like to move to from the list box located at the right of the “Government Lot Information” box.



   Or

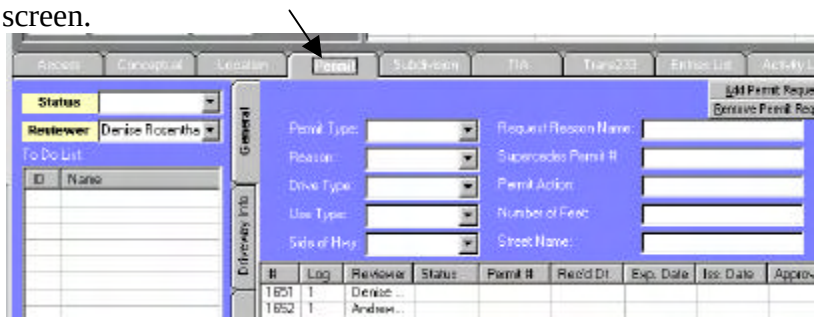
3. You may also move between records by selecting the navigation buttons located at the left of the “Government Lot Information” box.

Add Permit Request

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Permit” tab will display a list of all the Permit Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To add Permit Request

1. Locate the Log Entry that is to be associated with the Permit Request.
2. Select the “Permit” tab located in the middle of the screen.



3. Select the “Add Permit Request” button located at the right of the tab.
4. You may now enter the information into the blank fields located on the tab.

Note The “Permit” tab has a series of tabs located in the middle of the tab. Selecting these tabs will allow the user to enter information in all fields of the “Permit” tab.

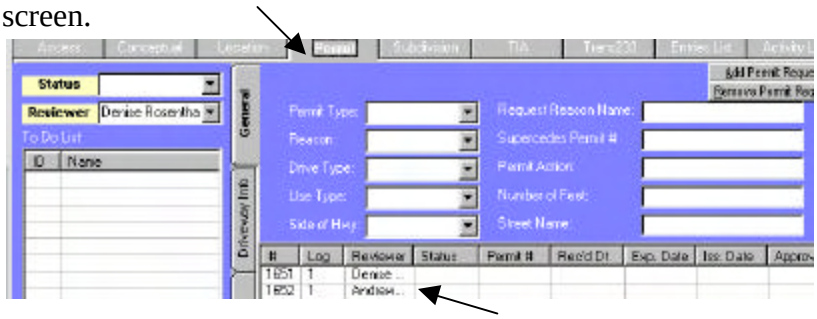
Editing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Permit” tab will display a list of all the Permit Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To edit a record

1. Locate the Log Entry that is to be associated with the Permit Request.

2. Select the “Permit” tab located in the middle of the screen.



3. Left Mouse Click the record you would like to modify from the list box, located at the bottom of the tab.
4. You may now edit the information of the fields shown on the tab.

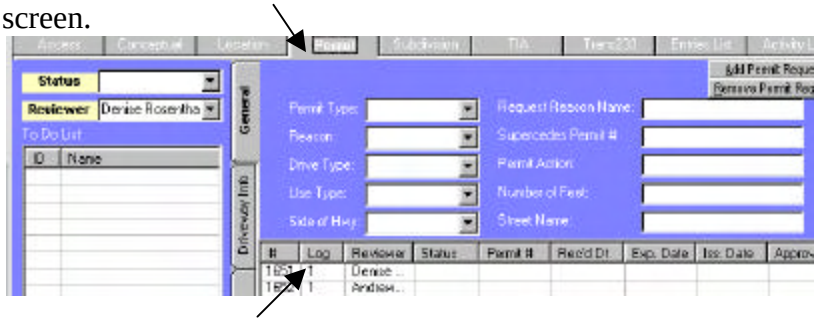
Note The “Permit” tab has a series of tabs located in the middle of the tab. Selecting these tabs will allow the user to edit information of all fields on the “Permit” tab.

Removing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Permit” tab will display a list of all the Permit Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To remove a record

1. Locate the Log Entry that is to be associated with the Permit Request.
2. Select the “Permit” tab located in the middle of the screen.



3. Left Mouse Click the record you would like to remove from the list box, located at the bottom of the tab.
4. Select the “Remove Permit Request” button located at the right of the tab.

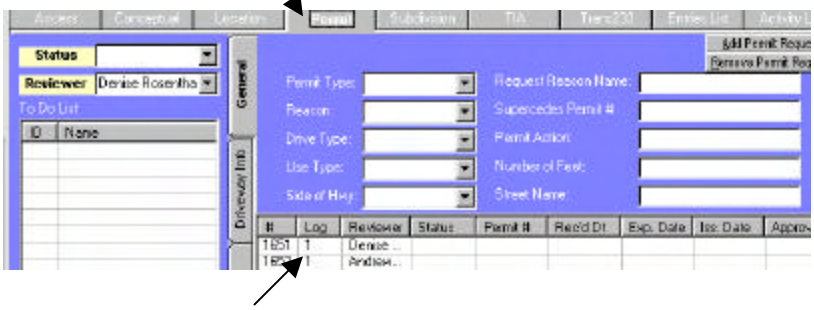
   The record that was selected should no longer be listed in the list box and the fields should now display the next record in the list.

Moving between Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Permit” tab will display a list of all the Permit Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To move between records

1. Select the “Permit” tab located in the middle of the screen.



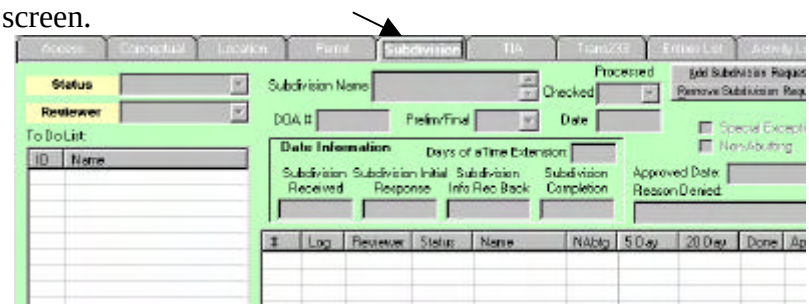
2. Left Mouse Click the record you would like to move to from the list box, located at the bottom of the tab.

Add Subdivision Request

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Subdivision” tab will display a list of all the Subdivision Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To add Subdivision Request

1. Locate the Log Entry that is to be associated with the Subdivision Request.
2. Select the “Subdivision ” tab located in the middle of the screen.



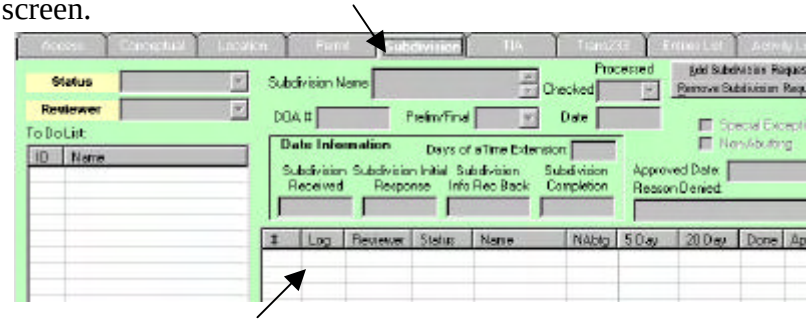
3. Select the “Add Subdivision Request” button located at the right of the tab.
4. You may now enter the information into the blank fields located on the tab.

Editing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Subdivision” tab will display a list of all the Subdivision Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To edit a record

1. Locate the Log Entry associated with the Subdivision Request.
2. Select the “Subdivision ” tab located in the middle of the screen.



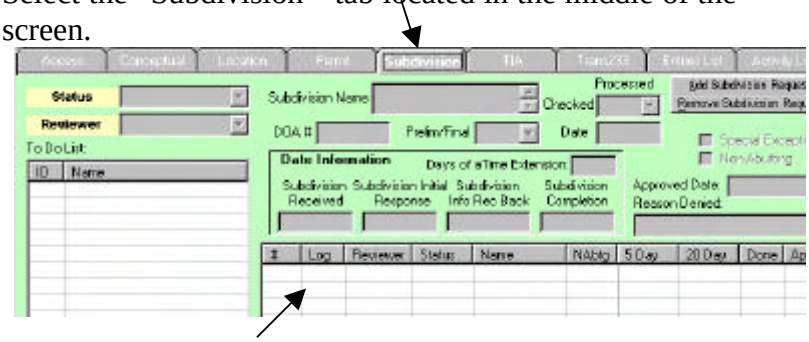
3. Left Mouse Click the record you would like to modify from the list box, located at the bottom of the tab.
4. You may now edit the information of the fields shown on the tab.

Removing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Subdivision” tab will display a list of all the Subdivision Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To remove a record

1. Locate the Log Entry associated with the Subdivision Request.
2. Select the “Subdivision ” tab located in the middle of the screen.



3. Left Mouse Click the record you would like to remove from the list box, located at the bottom of the tab.
4. Select the “Remove Access Request” button located at the right of the tab.

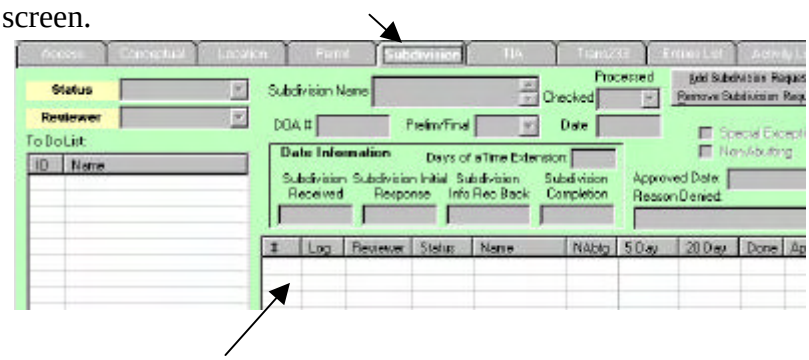
   The record that was selected should no longer be listed in the list box and the fields should now display the next record in the list.

Moving between Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Subdivision” tab will display a list of all the Subdivision Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To move between records

1. Select the “Subdivision ” tab located in the middle of the screen.



2. Left Mouse Click the record you would like to move to from the list box, located at the bottom of the tab.

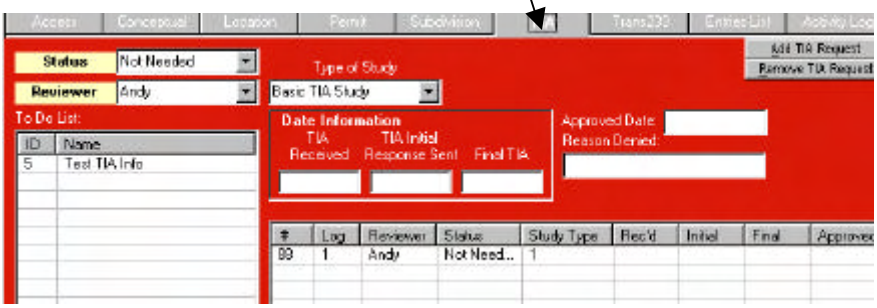
Add Traffic Impact Analysis Request

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “TIA” tab will display a list of all the Traffic Impact Analysis Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To add Access Request

1. Locate the Log Entry that is to be associated with the Traffic Impact Analysis Request.

2. Select the “TIA” tab located in the middle of the screen.



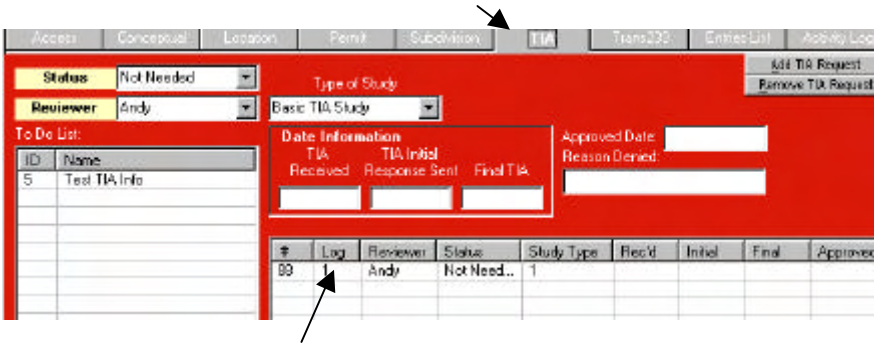
3. Select the “Add TIA Request” button located at the right of the tab.
4. You may now enter the information into the blank fields located, on the tab.

Editing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “TIA” tab will display a list of all the Traffic Impact Analysis Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To edit a record

1. Locate the Log Entry associated with the Traffic Impact Analysis Request.
2. Select the “TIA” tab located in the middle of the screen.



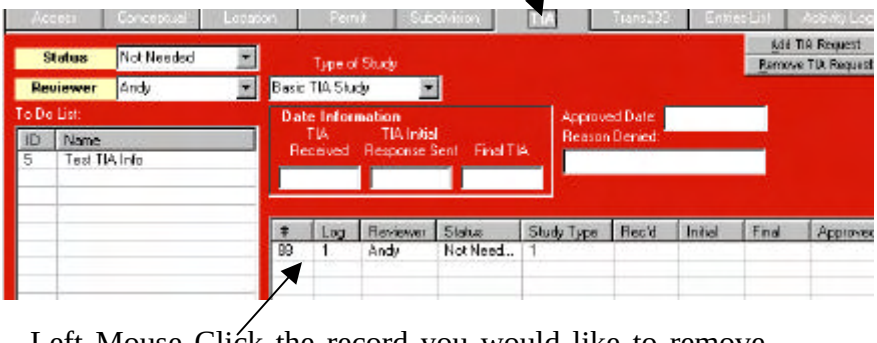
3. Left Mouse Click the record you would like to modify from the list box, located at the bottom of the tab.
4. You may now edit the information of the fields shown on the tab.

Removing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “TIA” tab will display a list of all the Traffic Impact Analysis Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To remove a record

1. Locate the Log Entry associated with the Traffic Impact Analysis Request.
2. Select the “TIA” tab located in the middle of the screen.



3. Left Mouse Click the record you would like to remove from the list box, located at the bottom of the tab.
4. Select the “Remove TIA Request” button located at the right of the tab.

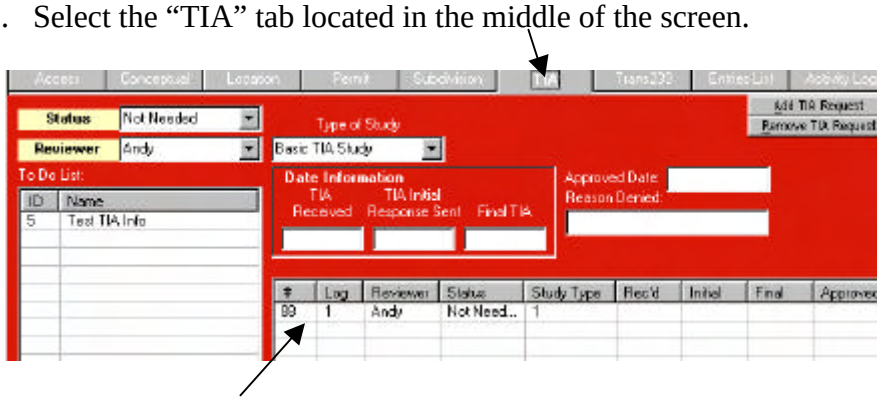
   The record that was selected should no longer be listed in the list box and the fields should now display the next record in the list.

Moving between Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “TIA” tab will display a list of all the Traffic Impact Analysis Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To move between records

1. Select the “TIA” tab located in the middle of the screen.



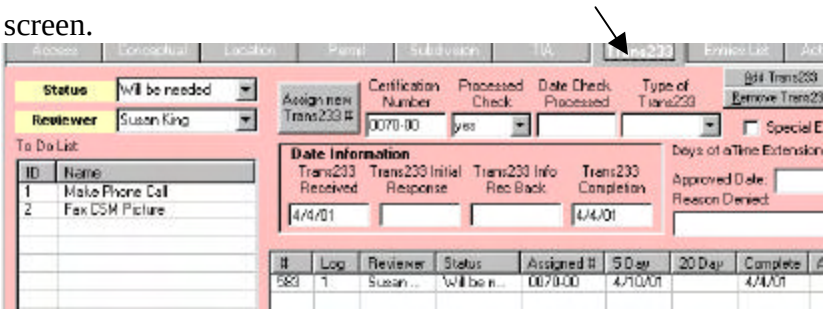
2. Left Mouse Click the record you would like to move to from the list box, located at the bottom of the tab.

Add Trans233 Request

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Trans233” tab will display a list of all the Trans233 Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To add Trans233 Request

1. Locate the Log Entry that is to be associated with the Trans233 Request.
2. Select the “Trans233” tab located in the middle of the screen.



3. Select the “Add Trans233 Request” button located at the right of the tab.
4. You may now enter the information into the blank fields, located on the tab.

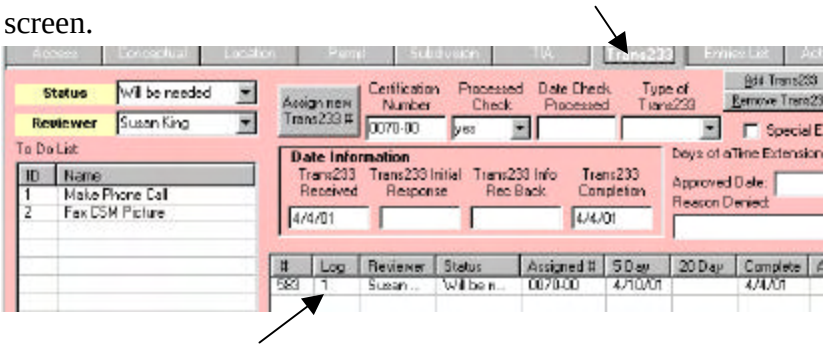
Editing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Trans233 ” tab will display a list of all the Trans233 Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To edit a record

1. Locate the Log Entry associated with the Trans233 Request.

2. Select the “Trans233” tab located in the middle of the screen.



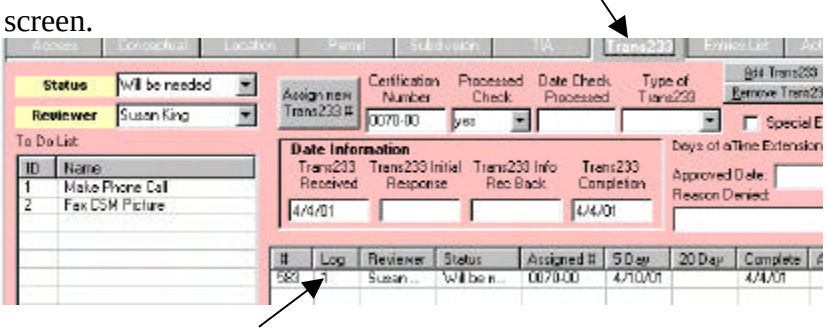
3. Left Mouse Click the record you would like to modify from the list box, located at the bottom of the tab.
4. You may now edit the information of the fields shown on the tab.

Removing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Trans233” tab will display a list of all the Trans233 Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To remove a record

1. Locate the Log Entry associated with the Trans233 Request.
2. Select the “Trans233” tab located in the middle of the screen.



3. Left Mouse Click the record you would like to remove from the list box, located at the bottom of the tab.
4. Select the “Remove Trans233 Request” button located at the right of the tab.

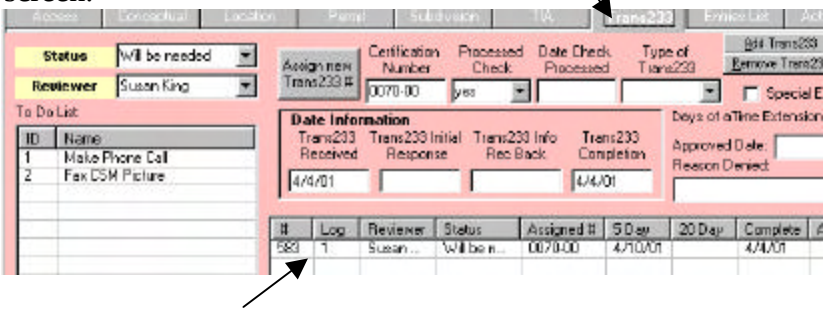
   The record that was selected should no longer be listed in the list box and the fields should now display the next record in the list.

Moving between Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Trans233 ” tab will display a list of all the Trans233 Requests. These requests are associated with the Log Entry displayed at the top of the screen.

To move between records

1. Select the “Trans233 ” tab located in the middle of the screen.



2. Left Mouse Click the record you would like to move to from the list box, located at the bottom of the tab.

Add Activity Log Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Activity Log” tab will display a list of all the Activity Log Records. These records are associated with the Log Entry displayed at the top of the screen.

To add Activity Log Records

1. Locate the Log Entry that is to be associated with the Activity Log Records.
2. Select the “Activity Log” tab located in the middle of the screen.

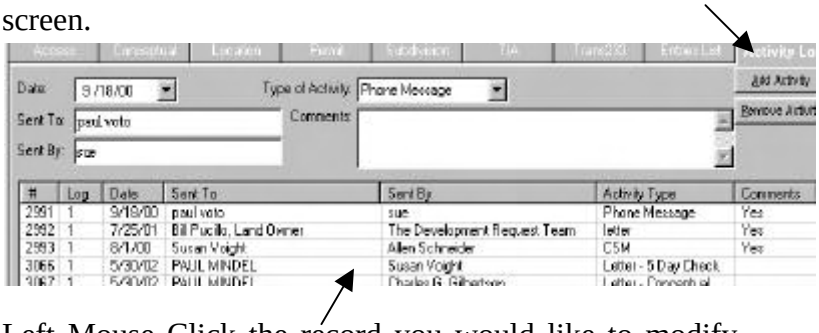
3. Select the “Add Activity” button located at the right of the tab.
4. You may now enter the information into the blank fields, located on the tab.

Editing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Activity Log” tab will display a list of all the Activity Log Records. These records are associated with the Log Entry displayed at the top of the screen.

To edit a record

1. Locate the Log Entry associated with the Activity Log Records.
2. Select the “Activity Log” tab located in the middle of the screen.



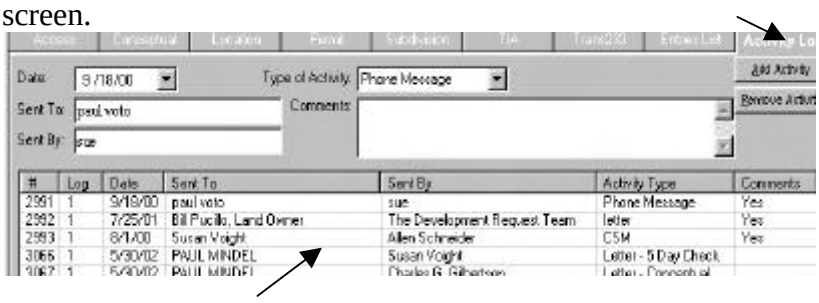
3. Left Mouse Click the record you would like to modify from the list box, located at the bottom of the tab.
4. You may now edit the information of the fields shown on the tab.

Removing Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Activity Log” tab will display a list of all the Activity Log Records. These records are associated with the Log Entry displayed at the top of the screen.

To remove a record

1. Locate the Log Entry associated with the Activity Log Records.
2. Select the “Activity Log” tab located in the middle of the screen.



3. Left Mouse Click the record you would like to remove from the list box, located at the bottom of the tab.

4. Select the “Remove Activity” button located at the right of the tab.

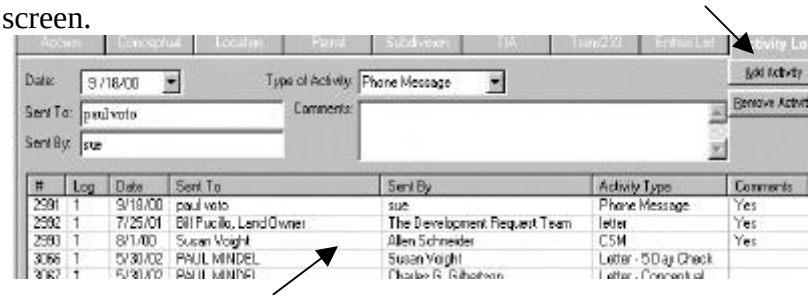
   The record that was selected should no longer be listed in the list box and the fields should now display the next record in the list.

Moving between Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Selecting the “Activity Log” tab will display a list of all the Activity Log Records. These records are associated with the Log Entry displayed at the top of the screen.

To move between records

1. Select the “Activity Log” tab located in the middle of the screen.



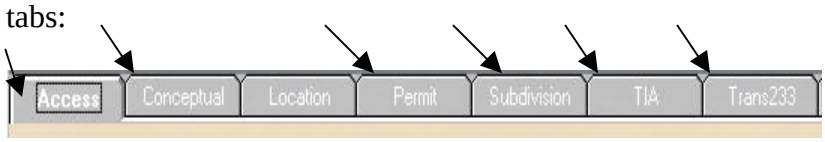
2. Left Mouse Click the record you would like to move to from the list box, located at the bottom of the tab.

Add To Do List Records

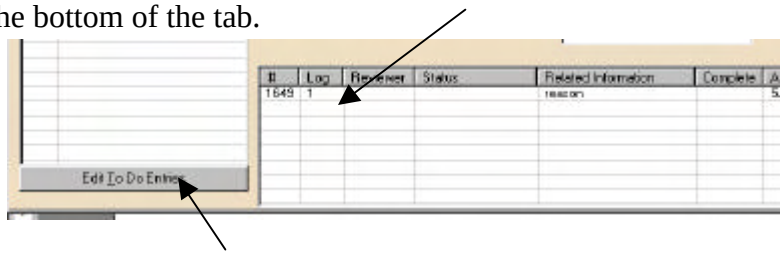
The Log Entries Screen has a series of tabs located in the middle of the screen. Six of these tabs are referred to as request tabs. Selecting an individual request on one of these six tabs “Access”, “Conceptual”, “Permit”, “Subdivision”, “TIA”, or “Trans233” will display a list of all associated To Do Entries.

To add To Do List Records

1. Locate the Log Entry associated with the individual request.
2. Locate the individual request that is to be associated with the To Do List Record by selecting one of the following tabs:



3. Select the individual request from the list box located at the bottom of the tab.



4. Select the "Edit To Do Entries" button located at the bottom, left of the tab. The To Do List Screen will be displayed.
5. On the To Do List Screen select the "Add" button located at the top, right of the screen.
6. You may now enter information into the blank fields of the To Do List Screen.

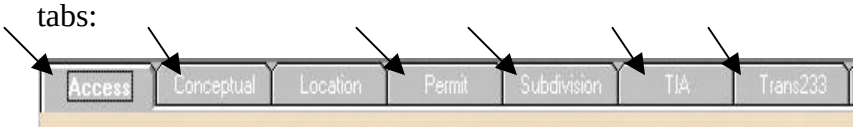
Note To Close the To Do List Screen select the "X" located in the upper right hand corner of the screen.

Editing Records

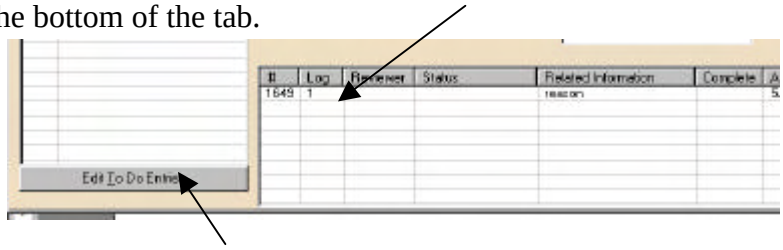
The Log Entries Screen has a series of tabs located in the middle of the screen. Six of these tabs are referred to as request tabs. Selecting an individual request on one of these six tabs "Access", "Conceptual", "Permit", "Subdivision", "TIA", or "Trans233" will display a list of all associated To Do Entries.

To edit a record

1. Locate the Log Entry associated with the individual request.
2. Locate the individual request that is to be associated with the To Do List Record by selecting one of the following tabs:

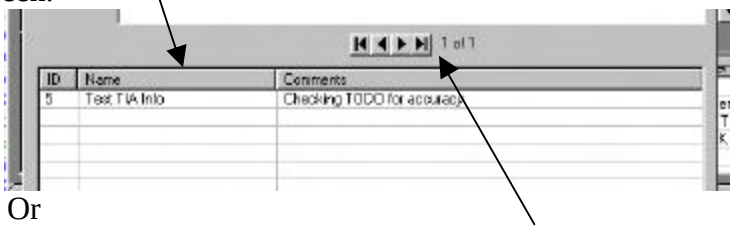


3. Select the individual request from the list box located at the bottom of the tab.



4. Select the "Edit To Do Entries" button located at the bottom, left of the tab. The To Do List Screen will be displayed.

5. Left Mouse Click the record you would like to modify from the list box, located at the bottom of the To Do List Screen.



Or

6. You may also select the record you would like to modify by selecting the navigation buttons located above the list box.
7. You may now edit the information in the fields of the To Do List Screen.

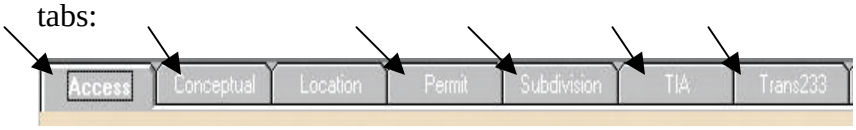
Note To Close the To Do List Screen select the "X" located in the upper right hand corner of the screen.

Removing Records

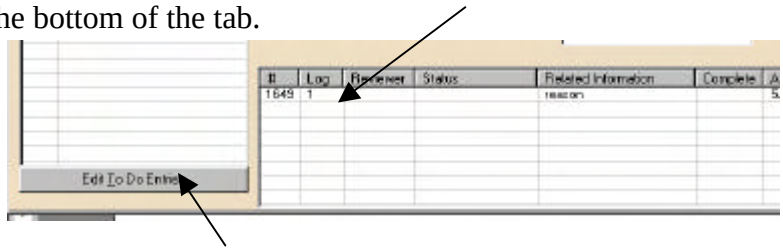
The Log Entries Screen has a series of tabs located in the middle of the screen. Six of these tabs are referred to as request tabs. Selecting an individual request on one of these six tabs "Access", "Conceptual", "Permit", "Subdivision", "TIA", or "Trans233" will display a list of all associated To Do Entries.

To remove a record

1. Locate the Log Entry associated with the individual request.
2. Locate the individual request that is to be associated with the To Do List Record by selecting one of the following tabs:

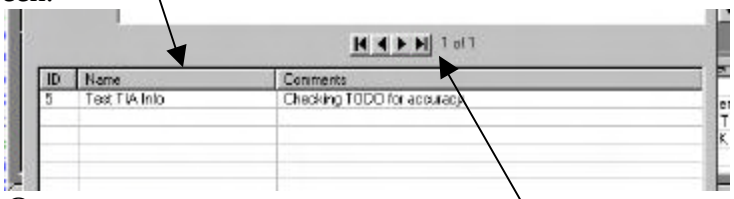


3. Select the individual request from the list box located at the bottom of the tab.



4. Select the "Edit To Do Entries" button located at the bottom, left of the tab. The To Do List Screen will be displayed.

5. Left Mouse Click the record you would like to remove from the list box, located at the bottom of the To Do List Screen.



Or

6. You may also select the record you would like to remove by selecting the navigation buttons located above the list box.
7. On the To Do List Screen select the “Remove” button located at the top, right of the screen.

   The record that was selected should no longer be listed in the list box and the fields should now display the next record in the list.

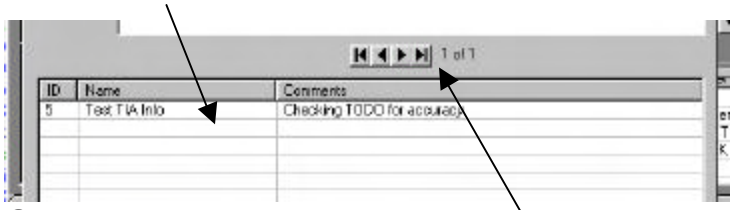
Note To Close the To Do List Screen select the “X” located in the upper right hand corner of the screen.

Moving between Records

The Log Entries Screen has a series of tabs located in the middle of the screen. Six of these tabs are referred to as request tabs. Selecting an individual request on one of these six tabs “Access”, “Conceptual”, “Permit”, “Subdivision”, “TIA”, or “Trans233” will display a list of all associated To Do Entries.

To move between records

1. On the To Do List Screen Left Mouse Click the record you would like to move to from the list box, located at the bottom of the screen.



Or

2. You may also select the record you would like to move to by selecting the navigation buttons located above the list box.

Note To Close the To Do List Screen select the “X” located in the upper right hand corner of the screen.

Sorting the List Box

To sort the list box

1. Left Mouse Click the column name of the list box.

Tip You can sort the list by more than one column.

How If you have a column named “First Name” and another column named “Last Name” and you would like to sort them by Last Name then First name you will want to:

(1) Select the First Name column

(2) Identify if you want the column to be sorted in “ascending” or “descending” order.

(3) You will then want to select the Last Name column

(4) Identify if you want the column to be sorted in “ascending” or “descending” order.

Note If the column is already in ascending order it will be put in descending order when you left mouse click the column name.

CHAPTER 4

Adding and Removing Log Entry Contacts

This chapter will explain how to add and remove associated contacts from a log entry. Knowing how to add contacts to be associated with a log entry is very import for the Tracking System. If you are unable to add a contact, Letters and Forms will not be able to work properly for your needs.

Note You cannot change how contacts information is displayed from the Edit Associated Contacts Screen. Changes to "General Contacts" can only be done in the Contacts Screen. "Municipal Contacts" cannot be changed; they are automatically updated by the Revenue Department every month.

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CREATE NEW CONTACT TO BE ASSOCIATED 49
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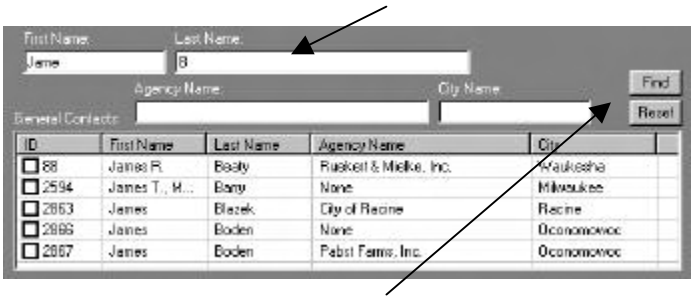
Find Contacts to be Associated

On the Log Entries Screen the “Associated Contacts” list box displays a list of all Associated Contacts to the current Log Entry. Selecting the “Edit Contact List” button will open the Edit Associated Contacts Screen.

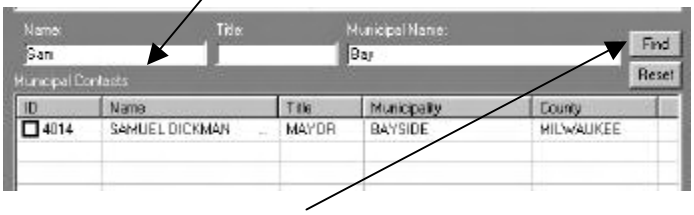
On this screen you will notice there are three list boxes. The list box located at the top displays a list matching the one on the Log Entries Screen. The list box in the middle displays all General Contacts in the Tracking System, and the list box at the bottom displays all Municipal Contacts in the Tracking System.

To find contacts to be associated

1. Located the Log Entry for which you would like to remove an associated contact.
2. On the Log Entries Screen select the “Edit Contact List” button located above the “Associated Contacts” list box. This will display the Edit Associated Contacts Screen.
3. To find a General Contact enter the search criteria in the four fields located above the “General Contacts” list box.



4. Select the “Find” button located to the right of these four fields. The “General Contacts” list box will display all matching Contacts.
5. To find a Municipal contact enter the search criteria in the three fields located above the “Municipal Contacts” list box.



6. Select the “Find” button located to the right of these three fields. The “Municipal Contacts” list box will display all matching Contacts.
7. Select the “Reset” button located above the “General Contacts” and “Municipal Contacts” list boxes to reset the search criteria for the corresponding list box.

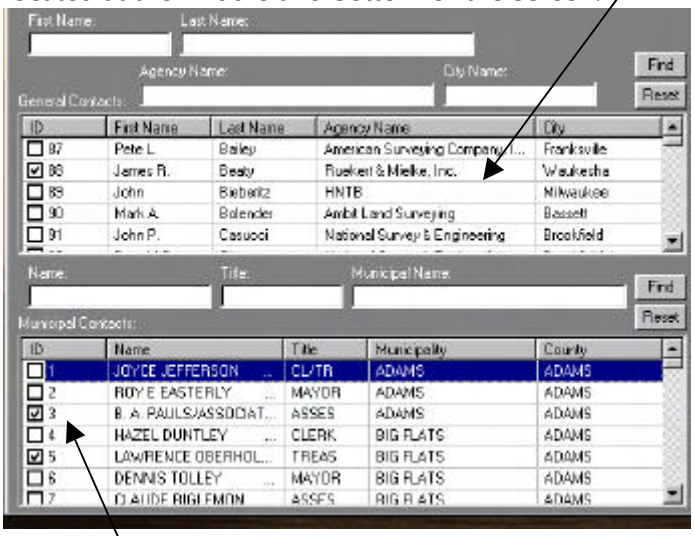
Add Associated Contacts

On the Log Entries Screen the “Associated Contacts” list box displays a list of all Associated Contacts to the current Log Entry. Selecting the “Edit Contact List” button will open the Edit Associated Contacts Screen.

On this screen you will notice there are three list boxes. The list box located at the top displays a list matching the one on the Log Entries Screen. The list box in the middle displays all General Contacts in the Tracking System, and the list box at the bottom displays all Municipal Contacts in the Tracking System.

To add associated contacts

1. Locate the Log Entry for which you would like to add an associated contact.
2. On the Log Entries Screen select the “Edit Contact List” button located above the “Associated Contacts” list box. This will display the Edit Associated Contacts Screen.
3. Find the Contacts you would like to associate in the “General Contacts” and “Municipal Contacts” list boxes located at the middle and bottom of the screen.



4. Place a check mark next to the Contacts you would like to associate in the list boxes.
5. Select the “Add Selected Contacts to List” button located at the top, right of the screen. This will display a screen for you to identify each contacts type.
6. Select the “Type of Contact” for the contact displayed and then select the “OK” button. Each contact that was selected will be displayed one at a time until a type has been identified for each.

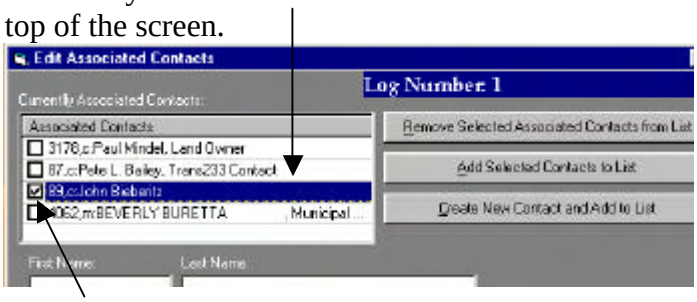
Remove Associated Contacts

On the Log Entries Screen the “Associated Contacts” list box displays a list of all Associated Contacts to the current Log Entry. Selecting the “Edit Contact List” button will open the Edit Associated Contacts Screen.

On this screen you will notice there are three list boxes. The list box located at the top displays a list matching the one on the Log Entries Screen. The list box in the middle displays all General Contacts in the Tracking System, and the list box at the bottom displays all Municipal Contacts in the Tracking System.

To remove associated contacts

1. Located the Log Entry for which you would like to remove an associated contact.
2. On the Log Entries Screen select the “Edit Contact List” button located above the “Associated Contacts” list box. This will display the Edit Associated Contacts Screen.
3. Find the Contacts you would like to remove in the “Currently Associated Contacts” list box located at the top of the screen.



4. Place a check mark next to the Contacts you would like to remove from the list box.
5. Select the “Remove Selected Associated Contacts from List” button located at the top, right of the screen. This will remove all check marked Contacts from the Associated List.

Create New Contact to be Associated

On the Log Entries Screen the “Associated Contacts” list box displays a list of all Associated Contacts to the current Log Entry. Selecting the “Edit Contact List” button will open the Edit Associated Contacts Screen.

On this screen you will notice there are three list boxes. The list box located at the top displays a list matching the one on the Log Entries Screen. The list box in the middle displays all General Contacts in the Tracking System, and the list box

at the bottom displays all Municipal Contacts in the Tracking System.

Note This feature is used only after you have used the Find options and are still unable to locate the Contact needed.

To create new contact to be associated

1. Located the Log Entry for which you would like to add an associated contact.
2. On the Log Entries Screen select the "Edit Contact List" button located above the "Associated Contacts" list box. This will display the Edit Associated Contacts Screen.
3. Select the "Create New Contact and Add to List" button located at the top, right of the screen.
4. Enter all of the information into the fields displayed on the screen. Select the "Type of Contact" your adding.
5. Select the "Add" button located at the bottom, right of the screen.

Note This feature will add the new contact to the "General Contacts" list box and the "Currently Associated Contacts" list box.

Sorting the List Boxes

To sort the list boxes

1. Left Mouse Click the column name of the list box.

Tip You can sort the list by more than one column.

How If you have a column named "First Name" and another column named "Last Name" and you would like to sort them by Last Name then First name you will want to:

(1) Select the First Name column

(2) Identify if you want the column to be sorted in "ascending" or "descending" order.

(3) You will then want to select the Last Name column

(4) Identify if you want the column to be sorted in "ascending" or "descending" order.

Note If the column is already in ascending order it will be put in descending order when you left mouse click the column name.

CHAPTER 5

Adding and Editing Permit Applications

Permit Applications allow users to enter Permit Application information quickly and produce printed copies of the information for the applicant. This chapter will explain how to add, edit, print and email permit applications.

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CREATE A NEW PERMIT APPLICATION 52
EDIT A PERMIT APPLICATION 52
MOVE BETWEEN PERMIT APPLICATIONS 53
PRINT PERMIT APPLICATIONS 53
PRINT DRIVEWAY CHECKLIST 54
EMAIL PERMIT APPLICATIONS 55

Open Permit Applications

On the Main Menu of the Tracking System select the "Entries" button. On the Log Entries Screen locate the log entry associated with the permit application. Select the permit tab on the tab set. On the permit tab select the dates tab and locate the permit you would like to open the application for and press the "Open Permit Applications" button located at the top of the permit tab.

Create a New Permit Application

To create a new permit application

1. Locate the log entry associated with the permit.
2. Select the permit tab of the tab set.
3. Select the date tab of the permit section.
4. Select the permit from the list box and press the "Open Permit Application" button.
5. This will open the Permit Application screen.
6. Select the type of Permit Application to create from the drop down menu at the top of the screen.
7. Once you have chosen the option you want, select the "Create New Permit" button located to the left of the drop down box.
8. You may now enter the information for the permit application.

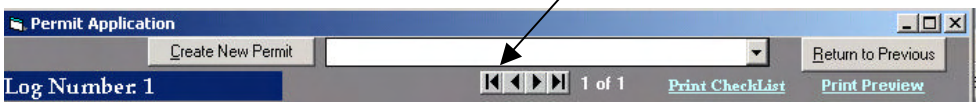
Note To go to the second page of the permit application select the "Go to Page 2 →" button located at the bottom, right of the screen. When you want to return to the first page of the permit application select the "Go to Page 1 →" button located at the bottom, right of the screen.

Edit a Permit Application

To edit a permit application

1. Locate the log entry associated with the permit.
2. Select the permit tab of the tab set.
3. Select the date tab of the permit section.
4. Select the permit from the list box and press the "Open Permit Application" button.
5. This will open the Permit Application screen.

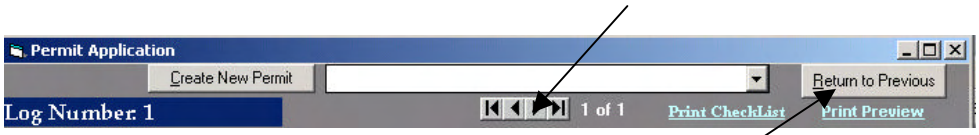
6. Locate the permit application you would like to modify by selecting the navigation buttons located at the top, middle of the Permit Application Screen.



Move between Permit Applications

To move between permit applicaitons

1. If the permit you have selected has more than one permit application then you would select the navigation buttons located at the top, middle of the Permit Application Screen.



Or

2. If the application you are looking for is associated with a different permit number then you will need to select the “Return to Previous” button and locate the proper permit number and then select the “Open Permit Applications” button on the dates tab of the permit tab set.

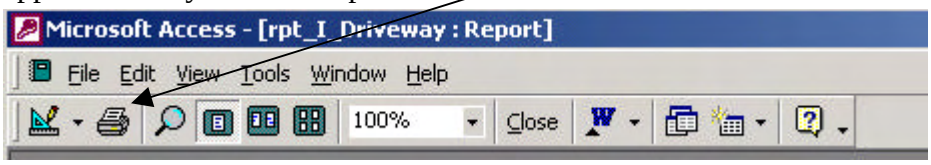
Print Permit Applications

To print permit applications

1. Locate the log entry associated with the permit.
2. Select the permit tab of the tab set.
3. Select the date tab of the permit section.
4. Select the permit from the list box and press the “Open Permit Application” button.
5. This will open the Permit Application screen.
6. Locate the permit application you would like to print by selecting the navigation buttons located at the top, middle of the Permit Application Screen.

7. Select the “Print Preview” link located at the top, right of the screen.

8. Select the “Print” button located on the toolbar at the top of your screen. This will print a copy of the permit application to your default printer.

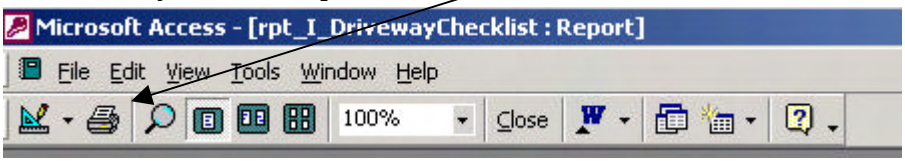


Print Driveway Checklist

To print permit applications

1. Locate the log entry associated with the permit.
2. Select the permit tab of the tab set.
3. Select the date tab of the permit section.
4. Select the permit from the list box and press the “Open Permit Application” button.
5. This will open the Permit Application screen.
6. Locate the driveway permit application you would like to print the driveway checklist for, by selecting the navigation buttons located at the top, middle of the Permit Application Screen.

7. Select the “Print Checklist” link located at the top, right of the screen.
8. Select the “Print” button located on the toolbar at the top of your screen. This will print a copy of the driveway checklist to your default printer.



Note The Driveway Checklist only prints the Permit Applicants Name and the Highway and County information. The other information on this form is to be entered by hand in the field and then placed in the data fields on the permit tab section of the log entries screen.

Email Permit Applications

To email permit applications

1. Open the permit application you would like to email.
2. The permit application should be displayed in Microsoft Access.
3. Select the “File” menu located in the top left corner of your screen. Select the “Send to” option and then the “Mail to Recipient (as attachment)”. The “Send” pop-up will be displayed.
4. Chose a format from the list and select the “OK” button. Your e-mail window will be displayed. Enter the information as you would normally when sending an email.

Note You will need to identify which format your recipient will be able to read before selecting an option. The lines that are displayed for the form will not transfer in an email unless the Snapshot Format is chosen.

CHAPTER 6

Adding and Editing Letters

Letters are a very import part of the Tracking System. They allow users to create standard letters very quickly and produce envelopes for the recipient and courtesy copy recipients. This chapter will explain how to add, edit and keep a legal copy of the letters associated to a log entry.

Note Users are unable to make changes to letters that have been marked as sent. The sent option is to allow the system to maintain the legal value of the letter. Marking the letter sent will place a comment in the Activity Log for the log entry, which lets users know that the correspondence has taken place.

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Open Letters

On the Main Menu of the Tracking System select the "Entries" button. On the Log Entries Screen locate the log entry associated with the letter. Select the "Open Letters" link located at the right of the screen.

Create a New Letter

To create a new letter

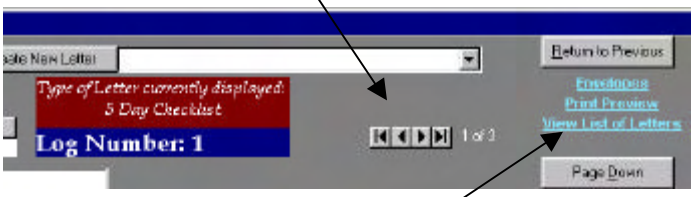
1. Locate the log entry to be associated with the letter.
2. Select the "Open Letters" link located at the right of the screen.
3. Select the drop down box located at the top, middle of the Letters Screen.
4. Selecting a letter option will display the content of the body for the letter option selected.
5. Once you have chosen the option you want, select the "Create New Letter" button located to the left of the drop down box.
6. You may now enter the information for the letter and change the content of the body to suit your needs.

Note To add your signature and courtesy copies select the "Page Down" button located at the top, right of the screen. When you want to return to the content of your letter select the "Page Up" button located at the top, right of the screen.

Edit Letters

To edit letters

1. Locate the log entry associated with the letter.
2. Select the "Open Letters" link located at the right of the screen.
3. Locate the letter you would like to modify by selecting the navigation buttons located at the top, right of the Letters Screen.



Or

4. You may also view a list of all letters for the current log entry by selecting the "View List of Letters" link located

at the top, right of the screen. Selecting one of the letters listed will take you to that letter.

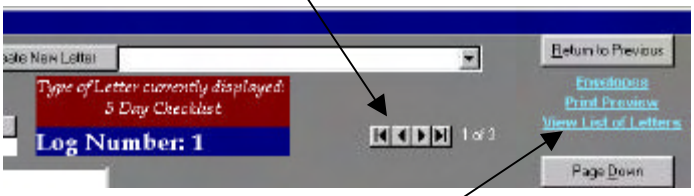
5. You may now edit the information for the letter and change the content of the body to suit your needs.

Note To change your signature or courtesy copies select the "Page Down" button located at the top, right of the screen. When you want to return to the content of your letter select the "Page Up" button located at the top, right of the screen.

Remove Letters

To remove letters

1. Locate the log entry associated with the letter.
2. Select the "Open Letters" link located at the right of the screen.
3. Locate the letter you would like to remove by selecting the navigation buttons located at the top, right of the Letters Screen.



Or

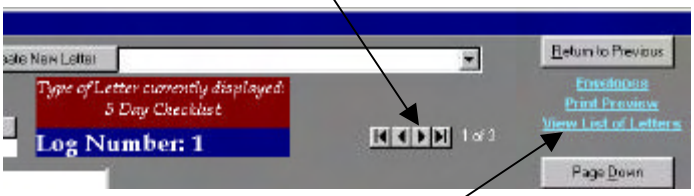
4. You may also view a list of all letters for the current log entry by selecting the "View List of Letters" link located at the top, right of the screen. Selecting one of the letters listed will take you to that letter.
5. Select the "Remove Letter" button located at the top, left of the screen.

Note Letters that have been marked as sent cannot be removed from the Tracking System.

Move between Letters

To move between letters

1. Select the letter you would like to move to by selecting the navigation buttons located at the top, right of the Letters Screen.



Or

2. You may also view a list of all letters for the current log entry by selecting the "View List of Letters" link located at the top, right of the screen. Selecting one of the letters listed will take you to that letter.

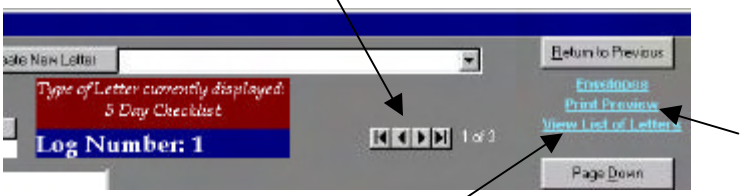
Modifying Letters for Print and Email

On the Main Menu of the Tracking System select the "Entries" button. On the Log Entries Screen locate the log entry associated with the letter. Select the "Open Letters" link located at the right of the screen. On the Letters Screen locate the letter you would like to modify the formatting for printed copies and e-mails. Select the "Print Preview" link located at the top right of the screen.

Modify Letter Formatting

To modify the letters

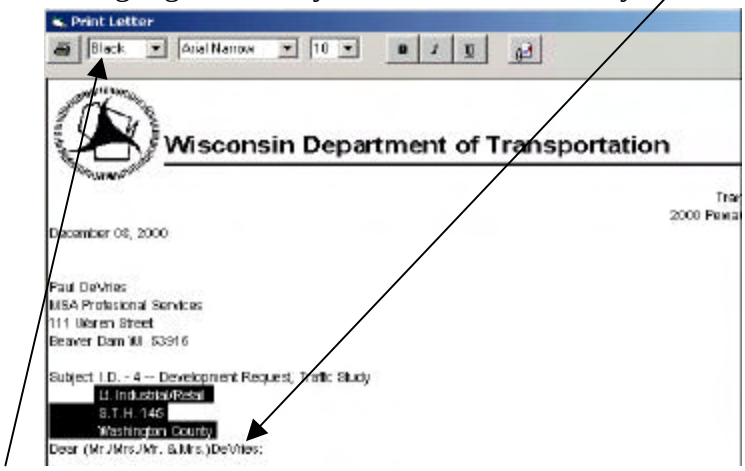
1. Locate the log entry associated with the letter.
2. Select the "Open Letters" link located at the right of the screen.
3. Locate the letter you would like to print by selecting the navigation buttons located at the top, right of the Letters Screen.



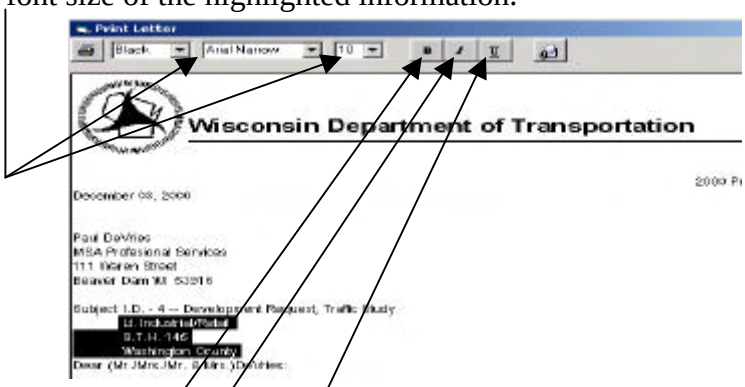
Or

4. You may also view a list of all letters for the current log entry by selecting the "View List of Letters" link located at the top, right of the screen. Selecting one of the letters listed will take you to that letter.

5. Select the “Print Preview” link located at the top, right of the screen.
6. Left mouse click and hold down the left mouse button while you drag it over the part(s) of the letter until you have highlighted what you would like to modify.



7. Select the first drop down on the left to modify the color of the highlighted information.
8. Select the second drop down from the left to modify the font and the third drop down from the left to modify the font size of the highlighted information.



9. Select the “**B**”, “*I*”, or “U” button located at the top of the Print Letter Screen to modify the Bold, Italic, or Underline formatting of the highlighted information.

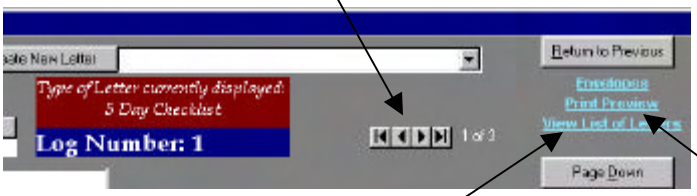
Note When you close the Print Letter Screen you loose all formatting that has been done. The formatting does not get saved at any time during the process of modifying the letter.

Print Letters

To print letters

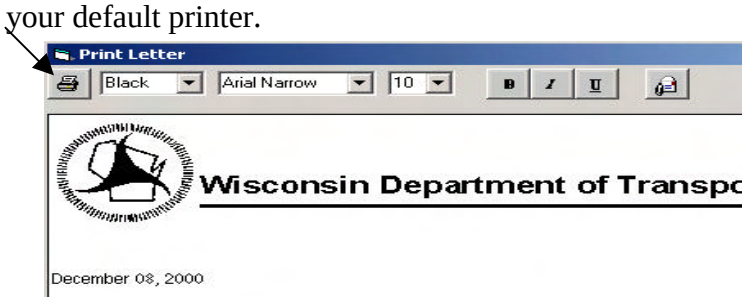
1. Locate the log entry associated with the letter.
2. Select the “Open Letters” link located at the right of the screen.

3. Locate the letter you would like to print by selecting the navigation buttons located at the top, right of the Letters Screen.



Or

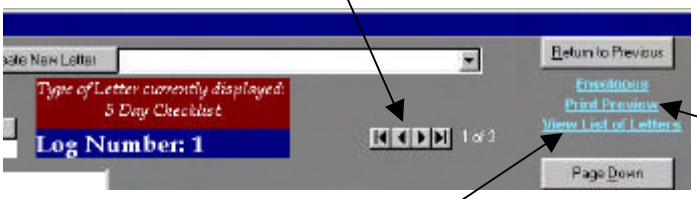
4. You may also view a list of all letters for the current log entry by selecting the "View List of Letters" link located at the top, right of the screen. Selecting one of the letters listed will take you to that letter.
5. Select the "Print Preview" link located at the top, right of the screen.
6. Select the "Print" button located on the toolbar at the top of your screen. This will print a copy of the letter to your default printer.



Email Letters

To email letters

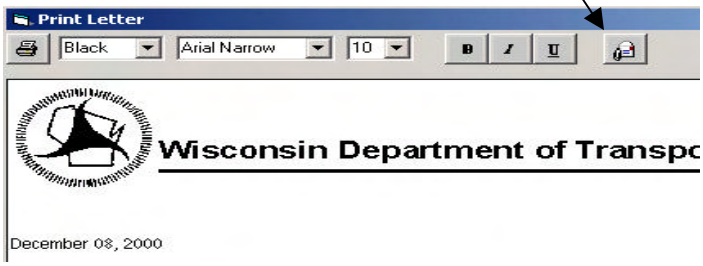
1. Locate the log entry associated with the letter.
2. Select the "Open Letters" link located at the right of the screen.
3. Locate the letter you would like to email by selecting the navigation buttons located at the top, right of the Letters Screen.



Or

4. You may also view a list of all letters for the current log entry by selecting the "View List of Letters" link located at the top, right of the screen. Selecting one of the letters listed will take you to that letter.
5. Select the "Print Preview" link located at the top, right of the screen.

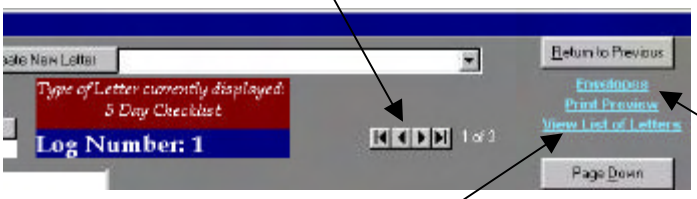
6. Select the “Send Email” button located at the top right of the Print Letter Screen. This will attach the letter to an email.



Customize Envelopes

To customize envelopes

1. Locate the log entry associated with the letter.
2. Select the “Open Letters” link located at the right of the screen.
3. Locate the letter you would like to modify by selecting the navigation buttons located at the top, right of the Letters Screen.



Or

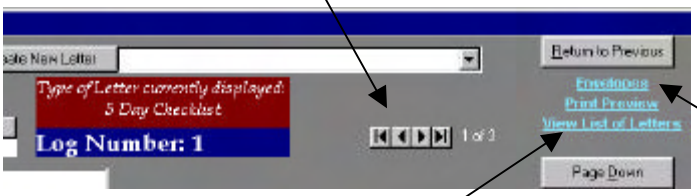
4. You may also view a list of all letters for the current log entry by selecting the “View List of Letters” link located at the top, right of the screen. Selecting one of the letters listed will take you to that letter.
5. Select the “Envelopes” link located at the top, right of the screen. The Envelopes Screen will be displayed.
6. Left Mouse Click the envelope you would like to customize in the list box located at the bottom of the screen.
7. You may now edit the information in the fields located above the list box for the selected envelope.

Remove Envelopes

To remove envelopes

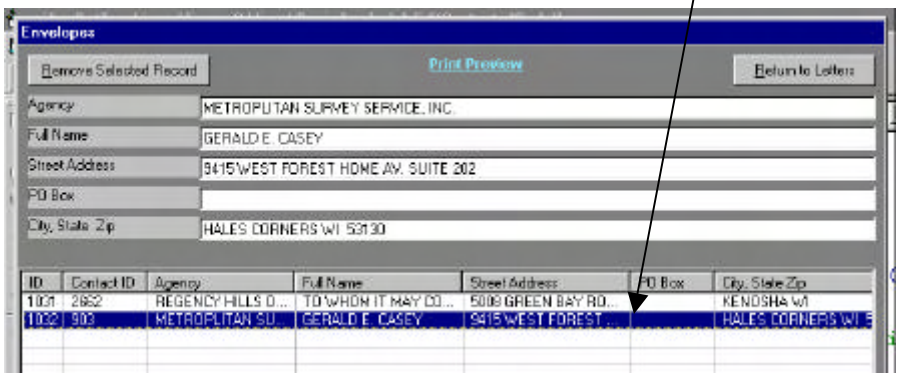
1. Locate the log entry associated with the letter.
2. Select the “Open Letters” link located at the right of the screen.

3. Locate the letter you would like to remove by selecting the navigation buttons located at the top, right of the Letters Screen.



Or

4. You may also view a list of all letters for the current log entry by selecting the "View List of Letters" link located at the top, right of the screen. Selecting one of the letters listed will take you to that letter.
5. Select the "Envelopes" link located at the top, right of the screen. The Envelopes Screen will be displayed.
6. Left Mouse Click the envelope you would like to remove in the list box located at the bottom of the screen.



7. Select the "Remove Selected Record" button located at the top, left of the screen.

   The record that was selected should no longer be listed in the list box.

Move between Envelopes

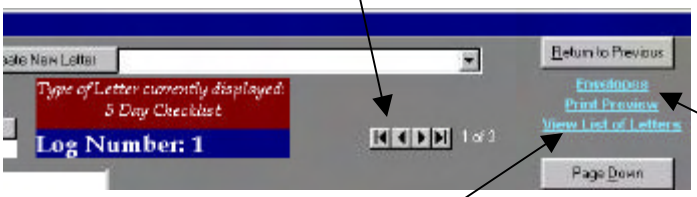
To move between envelopes

1. On the Envelopes Screen Left Mouse Click the envelope you would like to move to in the list box located at the bottom of the screen.

Print Envelopes

To print envelopes

1. Locate the log entry associated with the letter.
2. Select the “Open Letters” link located at the right of the screen.
3. Locate the letter you would like to print envelopes for by selecting the navigation buttons located at the top, right of the Letters Screen.



Or

4. You may also view a list of all letters for the current log entry by selecting the “View List of Letters” link located at the top, right of the screen. Selecting one of the letters listed will take you to that letter.
5. Select the “Envelopes” link located at the top, right of the screen. The Envelopes Screen will be displayed.
6. Select the “Print Preview” button located at the top, middle of the screen.
7. Select the “Print” button located on the toolbar at the top of your screen. This will print a copy of the print to your default printer.

Note If the envelopes being displayed for print are not in envelope form the page setup will need to be modified. To do this:

(1) Select the “File” menu located in the upper left corner of the screen.

(2) Select the “Page Setup” option from the menu list.

(3) Select the “Page” tab located at the top of the pop-up window.

(4) Select the “Size” drop down located in the “Paper” box in the middle of the pop-up window. Change the option to Envelope #10.

(5) Select the “OK” button located at the bottom of the pop-up window.

Sorting the List Boxes

To sort the list boxes

1. Left Mouse Click the column name of the list box.

Tip You can sort the list by more than one column.

How If you have a column named “First Name” and another column named “Last Name” and you would like to sort them by Last Name then First name you will want to:

(1) Select the First Name column

(2) Identify if you want the column to be sorted in “ascending” or “descending” order.

(3) You will then want to select the Last Name column

(4) Identify if you want the column to be sorted in “ascending” or “descending” order.

Note If the column is already in ascending order it will be put in descending order when you left mouse click the column name.

CHAPTER 7

Adding and Editing Forms

Forms are a very import part of the Tracking System. They allow users to create standard forms very quickly. This chapter will explain how to add, edit and keep a legal copy of the forms associated to a log entry.

Note Users are unable to make changes to forms that have been marked as sent. The sent option is to allow the system to maintain the legal value of the form. Marking the form sent will place a comment in the Activity Log for the log entry, which lets users know that the correspondence has taken place.

Chapter Contents

OPEN FORMS 67
- CREATE A NEW FORM 67
- EDIT FORMS 67
- REMOVE FORMS 67
- MOVE BETWEEN FORMS 68
- PRINT FORMS 68
- EMAIL FORMS 69

Open Forms

On the Main Menu of the Tracking System select the "Entries" button. On the Log Entries Screen locate the log entry associated with the form. Select the "Open Forms" link located at the right of the screen.

Create a New Form

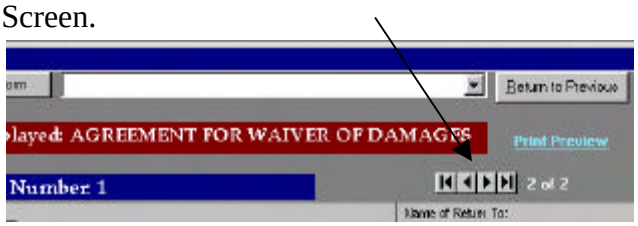
To create a new form

1. Locate the log entry to be associated with the form.
2. Select the "Open Forms" link located at the right of the screen.
3. Select the drop down box located at the top, middle of the Forms Screen.
4. Once you have chosen the option you want, select the "Create New Form" button located to the left of the drop down box.
5. You may now enter the information for the form.

Edit Forms

To edit forms

1. Locate the log entry associated with the form.
2. Select the "Open Forms" link located at the right of the screen.
3. Select the form you would like to move to by selecting the navigation buttons located at the top, right of the Forms Screen.

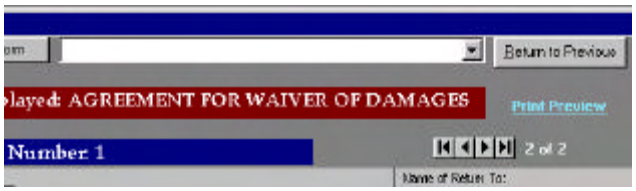


4. You may now edit the information for the form.

Remove Forms

To remove forms

1. Locate the log entry associated with the form.
2. Select the "Open Forms" link located at the right of the screen.
3. Select the form you would like to move to by selecting the navigation buttons located at the top, right of the Forms Screen.



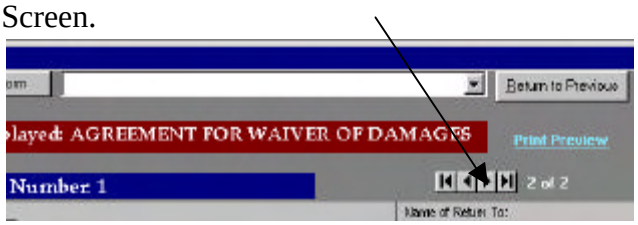
4. Select the “Remove Form” button located at the top, left of the screen.

Note Forms that have been marked as sent cannot be removed from the Tracking System.

Move between Forms

To move between forms

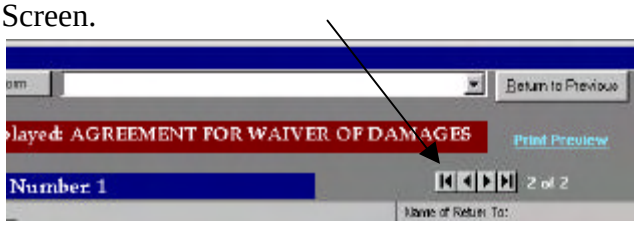
1. Select the form you would like to move to by selecting the navigation buttons located at the top, right of the Forms Screen.



Print Forms

To print forms

1. Locate the log entry associated with the form.
2. Select the “Open Forms” link located at the right of the screen.
3. Select the form you would like to move to by selecting the navigation buttons located at the top, right of the Forms Screen.

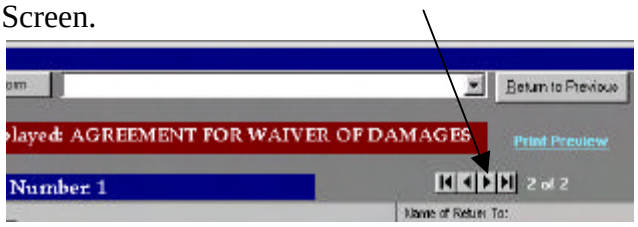


4. Select the “Print Preview” link located at the top, right of the screen.
5. Select the “Print” button located on the toolbar at the top of your screen. This will print a copy of the form to your default printer.

Email Forms

To email forms

1. Locate the log entry associated with the form.
2. Select the “Open Letters” link located at the right of the screen.
3. Select the form you would like to move to by selecting the navigation buttons located at the top, right of the Forms Screen.



4. Select the “Print Preview” link located at the top, right of the screen.
5. Select the “File” menu located in the top left corner of your screen. Select the “Send to” option and then the “Mail to Recipient (as attachment)”. The “Send” pop-up will be displayed.
6. Chose a format from the list and select the “OK” button. Your e-mail window will be displayed. Enter the information as you would normally when sending an email.

Note You will need to identify which format your recipient will be able to read before selecting an option. The lines that are displayed for the form will not transfer in an email unless the Snapshot Format is chosen.

CHAPTER 8

Searching for Log Entries

This chapter will explain how to search the Tracking System for the Log Entry you would like to find.

Note The search can sometime take a few moments to load the data that was found in the Tracking System.

Chapter Contents

OPEN SEARCH SCREEN 71
GENERAL SEARCH 71
- SEARCH BY: 71
  - Request Type 71
  - Location Information 71
  - Legal Location 72
  - RP Information 72

SPECIFIC SEARCH 72
- LOG NUMBER 72
- DEVELOPMENT NAME 73
- PERMIT NUMBER 73
- PERMIT LOCATION 73

DISPLAY SELECTED RECORD 74
CLEAR FORM 74
SORTING THE LIST BOXES 75

Open Search Screen

On the Main Menu of the Tracking System select the "Search" button to open the Search Screen.

General Search

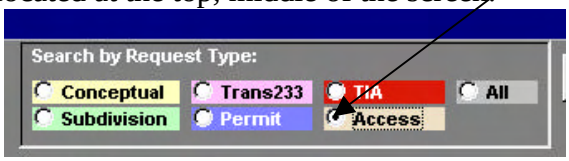
On the Search Screen there are three gray boxes, which allow the user to select search criteria from the combo boxes located with in the gray boxes. The matching information is displayed in the corresponding list box located below or to the right of the gray box with the selected criteria.

Note Selecting an option one combo box changes the options available in all other combo boxes not yet selected from with in the gray boxes.

Search By:

Request Type

1. Open the Search Screen from the Main Menu.
2. Select the Request Type you would like to Search By located at the top, middle of the screen.



3. The matching results will be displayed in the list boxes located on the screen.

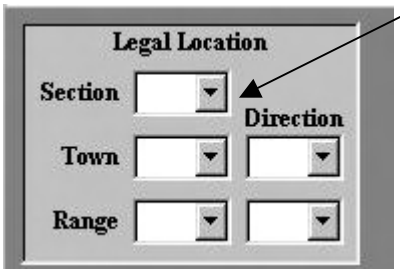
Location Information

1. Open the Search Screen from the Main Menu.
2. Select a combo box from the "Location Information" gray box located at the middle left of the screen.

3. The matching results will be displayed in the list boxes located on the screen.

Legal Location

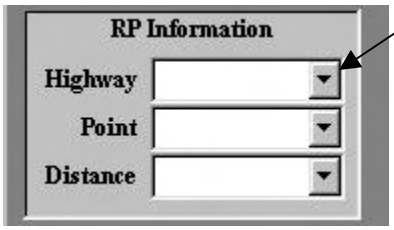
1. Open the Search Screen from the Main Menu.
2. Select a combo box from the “Legal Location” gray box located at the left of the screen.



3. The matching results will be displayed in the list boxes located on the screen.

RP Information

1. Open the Search Screen from the Main Menu.
2. Select a combo box from the “RP Information” gray box located at the left of the screen.



3. The matching results will be displayed in the list boxes located on the screen.

Specific Search

On the Search Screen there is a field called “Log Number” and a combo box called “Development Name”. These two fields allow a user to go to the specific Log Entry with out searching by criteria.

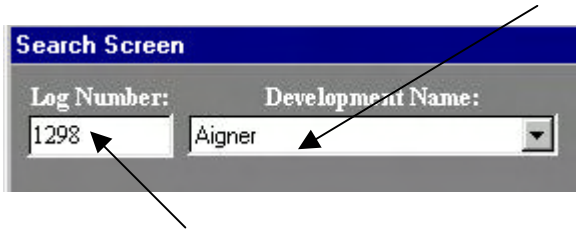
Note Using these options will not change what is currently displayed in the list boxes located on the screen.

Log Number

1. Open the Search Screen on the Main Menu.
2. Enter the Log Entry Number into the “Log Number” field.

Development Name

1. Open the Search Screen on the Main Menu.
2. Select the Development Name from the combo box.

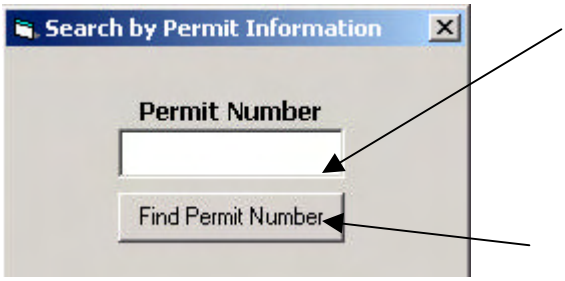


3. This will place the Log Entry Number of the Development Name selected into the "Log Number" field.

Permit Number

1. Open the Search Screen on the Main Menu.
2. Select the Search by Permit Information button.

3. This will open the Searcy by Permit Information screen.

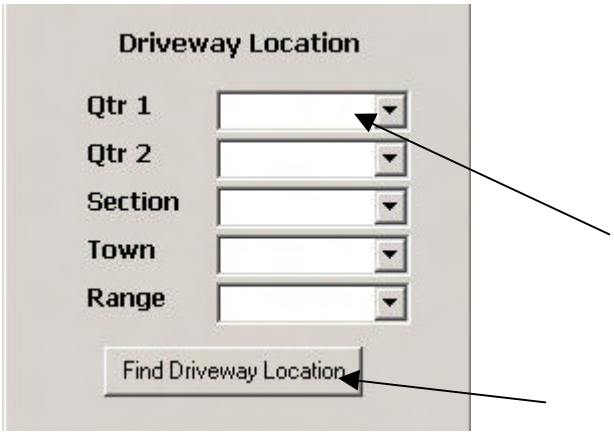


4. Enter the permit number in the Permit Field and select the Find Permit Number button.

Permit Location

1. Open the Search Screen on the Main Menu.
2. Select the Search by Permit Information button.

3. This will open the Searcy by Permit Information screen.



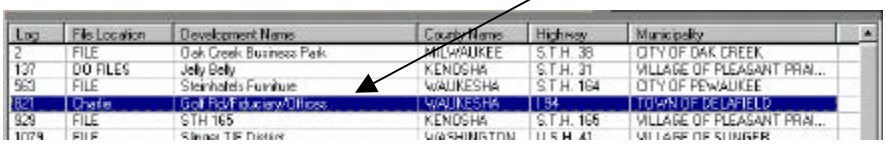
4. Select from any or all of the drop down boxes to select the location information and then select the Find Driveway Location button.

Note Selecting one or two drop down options is recommended verses selecting all.

Display Selected Record

To display the selected record

1. Open the Search Screen on the Main Menu.
2. Select the search criteria to locate the Log Entry you would like to display.
3. If you are doing a "General Search" you will need to select the record you would like to display from one of the list boxes located on the screen.



Log	File Location	Development Name	County Name	Highway	Municipality
2	FILE	Oak Creek Business Park	MILWAUKEE	S.T.H. 38	CITY OF OAK CREEK
137	DO FILES	Jelly Belly	KENOSHA	S.T.H. 31	VILLAGE OF PLEASANT PRAI...
563	FILE	Steinhafels Furniture	WAUKESHA	S.T.H. 164	CITY OF PEWAUKEE
837	Charlie	Golf Rd/Fiduciary/Offices	WAUKESHA	I 94	TOWN OF DELAFIELD
929	FILE	STH 165	KENOSHA	S.T.H. 165	VILLAGE OF PLEASANT PRAI...

4. Select the "Open Log Entries" button located at the right of the screen. This will display the Log Entries Screen with the selected record.

Clear Form

This feature is used when you want to start your search criteria over. This will remove any selections that have been place on the screen and all records displayed in the list boxes will be removed.

To clear the form

1. Open the Search Screen on the Main Menu.
2. Select the "Clear Form" button located at the right of the screen. This will clear all selections.

Sorting the List Boxes

To sort the list boxes

1. Left Mouse Click the column name of the list box.

Tip You can sort the list by more than one column.

How If you have a column named “First Name” and another column named “Last Name” and you would like to sort them by Last Name then First name you will want to:

(1) Select the First Name column

(2) Identify if you want the column to be sorted in “ascending” or “descending” order.

(3) You will then want to select the Last Name column

(4) Identify if you want the column to be sorted in “ascending” or “descending” order.

Note If the column is already in ascending order it will be put in descending order when you left mouse click the column name.

CHAPTER 9

Viewing and Printing Reports

This chapter will explain how to view and print reports that are in the Tracking System.

Note Users can request to have new reports add to their Tracking System. The user will want to have a detailed list of items they would like to see in their report and have their Tracking System Administrator process the request.

Chapter Contents

OPEN LOG ENTRY REPORT 77
- LOG ENTRIES SCREEN 77
- SEARCH SCREEN 77

OPEN ALL OTHER REPORTS..... 77
PRINT REPORTS..... 78
EMAIL REPORTS..... 78

Open Log Entry Report

The Log Entry Report can be open from the Log Entries Screen or the Search Screen.

To open Log Entry Report

Log Entries Screen

1. Open the Log Entries Screen by selecting the "Log Entries" button on the Main Menu.
2. Locate the Log Entry for which you would like to view the report by selecting the navigation buttons located at the middle, right of the screen.

   Or
3. You may also locate the Log Entry by selecting the "Entries List" tab and Left Mouse Click the record from the list located at the bottom of the tab.
4. Select the "Open Log Entry Report" link locate at the top, right of the screen.
5. Microsoft Access will open displaying the Log Entry Report with the selected Log Number.

Search Screen

1. Open the Search Screen by selecting the "Search" button on the Main Menu.
2. Locate the Log Entry for which you would like to view the report by using the search options on the screen. Then Left Mouse Click the record from any of the lists located on the screen.
3. Select the "Open Log Entry Report" button located in the middle of the screen.
4. Microsoft Access will open displaying the Log Entry Report with the selected Log Number.

Note The log number for which you would like to view the report needs to be displayed in the Log Number field located at the top, left of the screen. The report will not open if this field does not display a log number.

Open All Other Reports

To open all other reports

1. On the Main Menu select the "Reports" button to display the Reports Screen.

2. On the Reports Screen use the drop down box in the center of the screen to select the report you would like to open.
3. Once you have the report you would like to open displayed in the drop down box select the “OK” button.
4. Microsoft Access will open displaying the selected Report, or a form that lets you chose options for the selected report.

Print Reports

To print reports

1. Open the report you would like to print.
2. The report should be displayed in Microsoft Access.
3. Select the “Print” button located on the toolbar at the top of your screen. This will print a copy of the report to your default printer.

Tip If you would like to print to a different printer, select the “File” menu located in the upper left corner of the window. Then select the “Print” option from the menu list. This will open the Print Properties. Use the drop down located at the top of Print Properties window to select a different printer.

Email Reports

To email reports

1. Open the report you would like to email.
2. The report should be displayed in Microsoft Access.
3. Select the “File” menu located in the top left corner of your screen. Select the “Send to” option and then the “Mail to Recipient (as attachment)”. The “Send” pop-up will be displayed.
4. Chose a format from the list and select the “OK” button. Your e-mail window will be displayed. Enter the information as you would normally when sending an email.

Note You will need to identify which format your recipient will be able to read before selecting an option. The lines that are displayed for the form will not transfer in an email unless the Snapshot Format is chosen.

CHAPTER 10

Creating and Setting Up New Reports

The current list of reports that the user can use within the Tracking System can be modified and added to. This chapter will explain how to add new reports to the Tracking System and will explain where you create and set up these new reports.

Note Users can request to have new reports added to their Tracking System. The user will want to have a detailed list of items they would like to see in their report and have their Tracking System Administrator process the request.

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CREATING NEW REPORTS 80
SETTING UP NEW REPORTS 80
SETTING UP REPORT OPTIONS 80
MODIFYING EXISTING REPORTS 81
NOTES OF CAUTION 81

Creating New Reports

Reports are created in the Microsoft Access database that stores the Tracking System information. To create a new report you will need to open the database and go to the reports menu option. To understand the table structures of the database please refer to the Access Determination Tracking System Design Manual. This will aid you in setting up queries to fit the report being created.

Note You will want to be familiar with how to create reports in Microsoft Access.

Setting Up New Reports

Reports must be named using the following standards to set them up for the Tracking System.

(1) You must start the name of your report as “rpt_” or the Tracking System will not add the report to the reports list.

(2) Reports must NOT be named starting with “rpt_I_” or the Tracking System will not add them to the reports list. Reports that are named with the prefix “rpt_I_” are considered internal reports only.

Setting Up Report Options

This feature is used when you want to allow the user to create a more specific report based on criteria.

To set up report options

1. Open the Tracking System Database.
2. Create a query that has the parameter(s) needed to set the criteria options for the report.
3. Create a form that allows the users to select or enter the parameter(s) option(s).
4. Name the form “frm_” + “report name”.

   Example: Report Name = “rpt_New_Report”
   Form Name = “frm_New_Report”

Note If the form name is not spelled exactly like the report name the system will not display the criteria option when the user requests the report.

Modifying Existing Reports

To modify existing reports

1. Open the Tracking System Database.
2. Locate the report you would like to modify.
3. Open report in design view and make the necessary changes.
4. Save changes on close of the report.

Notes of Caution

The system will not function properly if the reports that are named with the prefix “rpt_I_” are re-named or if the following reports are modified:

1. “rpt_I_Development”
2. “rpt_I_Dev_Gov_Lots”
3. “rpt_I_Dev_Location”
4. “rpt_I_Dev_Requests”
5. “rpt_I_Driveway”
6. “rpt_I_DrivewayChecklist”
7. “rpt_I_DrivewayPart1”
8. “rpt_I_DrivewayPart2”
9. “rpt_I_Envelopes”
10. “rpt_I_Forms”
11. “rpt_I_Forms_Top_L”
12. “rpt_I_Forms_Top_R”
13. “rpt_I_RightOfWay”
14. “rpt_I_RWPage2”
15. “rpt_I_RWPage3”
16. “rpt_I_RWPage4”
17. “rpt_I_RWSpecialNBs”

Appendix A

Correcting and Saving Data

When is Data Saved?

Whenever you change data on a screen, the Tracking System automatically saves your changes as soon as you move to another field, or when you close the current screen and open another.

You don't have to tell the Tracking System to save the changes you make to records. If you make a mistake, though, you can correct it. For information on making corrections, see "Correcting Mistakes with the Undo Command".

Correcting Mistakes with the Undo Command

The Tracking System remembers the last change you made to your data until you change records or until you go to another screen. If you type data incorrectly, you can tell the Tracking System to undo the changes.

To correct mistakes

1. Place cursor into the field for which you would like to undo changes.
2. Right Mouse Click and the pop-up menu will be displayed. The options the system has available currently at that time will be in black text.
3. Select the "Undo" menu command. This will undo the changes that have taken place.

   Or
4. You may press the "CTRL+Z" keys on your keyboard. This will also undo the changes that have taken place.

Appendix B

Keyboard Techniques

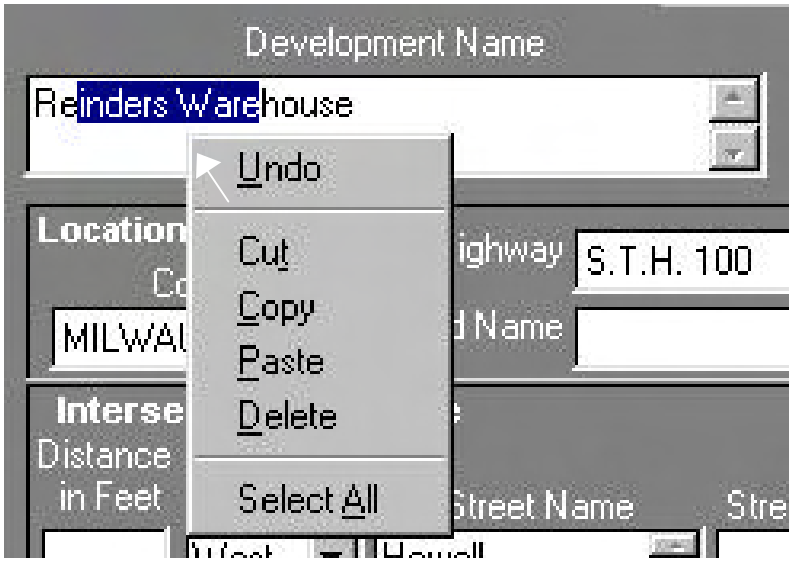
The following table lists keyboard techniques that can be used through out the Tracking System.

To	Do this
Move to Next field	Press TAB
Move to Previous field	Press SHIFT+TAB
Moves to First space in a field	Press HOME
Moves to Last space in a field	Press END
Highlight all text from cursor to Start of field	Press CTRL+SHIFT+HOME
Highlight all text from cursor to End of field	Press CTRL+SHIFT+END
Add a tab to a field with text	Press CTRL+TAB
Move the insertion point with in a field	Press the ARROW KEYS
Undo changes to current field	Press CTRL+Z
Insert a new line character with in a field	Press Enter, CTRL+Enter, CTRL+J, or CTRL+M
Open a combo box list to display choices	Press F4
Copy selected text	Press CTRL+C
Cut selected text	Press CTRL+X
Past copied text	Press CTRL+V
Delete previous character	Press CTRL+H or Backspace

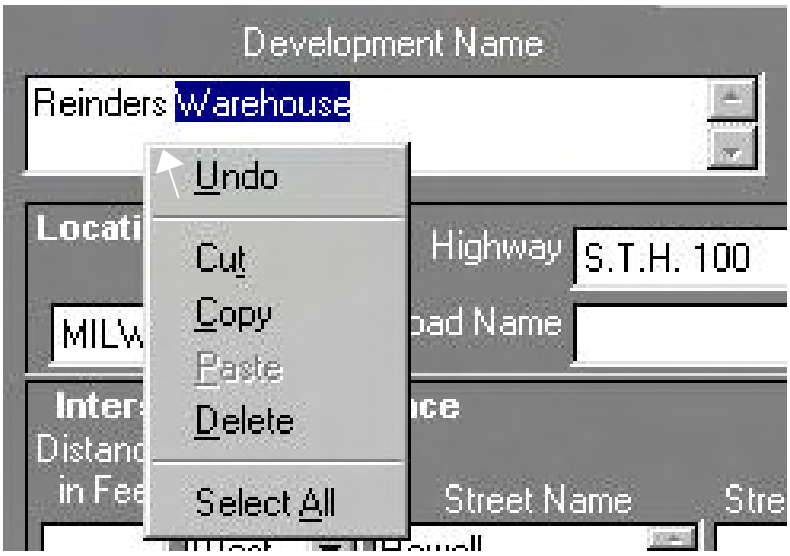
Appendix C

Mouse Techniques

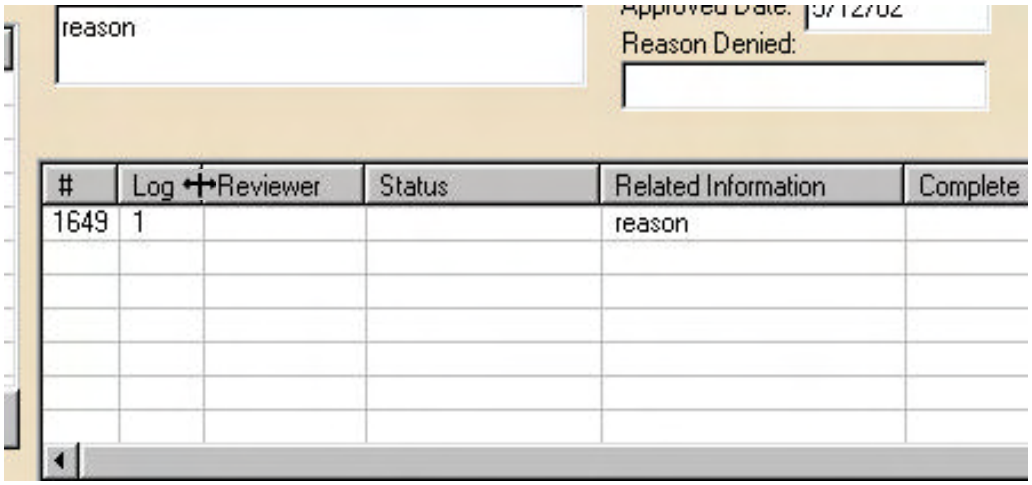
Right clicking the mouse will display the following pop-up window:



This pop-up window will only display the options that are available to you at the current time you have Right Mouse Clicked. If you do not have an option available to you at the current time the following will be displayed in the pop-up window:



Placing your mouse curser between column headings in a list box will allow you to readjust the current width of the column on left of your curser. This adjustment is only temporary when you go to a new record or leave the form the column width will automatically resize.


reason
Reason Denied:
#
Log
Reviewer
Status
Related Information
Complete
1649
1
reason

Data Setup and Requirements for the Access Determination GIS Application

Scanned Documents/Digital Image Files

There are three types of images that the system is setup to handle. Trans 233 images, Permit images, and Subdivision Images. If there is an image that does not fit into these categories, then use the Trans233 other document type.

Location and Naming

The locations for storing the images will follow the directory listings below, starting with computer/server, followed by landdivs, scanneddocs, county name, and type.

Trans233 Documents (A trans233 document is any document that is not a subdivision or permit.)
\\wke32h31910\gis\landdivs\scanneddocs\Waukesha\Trans233\
This subdirectory will house all of the types of Trans233 scans, including csm's, access covenants, conceptuals, and others. The naming conventions of them will be**:** **T00001001.pdf** – The **T** is for csm, **A** will be used for access covenants, **C** for conceptuals, and **O** for others. The next five numbers is the **log number** (This must be five characters). The last three numbers will be a consecutive number starting at **001** (This must be three characters). They will be saved in Adobe Acrobat (pdf) format. Any existing files acquired from local sources such as certified survey maps will also be stored as pdf files and will be named by the county assigned csm numbers. The format may be tif, jpg or pdf, but the user must have the viewer installed for the file type on their pc.

Permit Documents (A permit document is a digital image of a driveway permit.)
\\wke32h31910\gis\landdivs\scanneddocs\Waukesha\Permits\
The naming scheme for permits will correspond to the permit number which will now be the driveway number that is assigned to an access point when it is entered into the GIS system. These digital images will also be stored in pdf format. For complete naming standards for driveways refer to the driveway naming standards section below.

Subdivision Documents (A subdivision document is a digital image of a subdivision plat.)
\\wke32h31910\gis\landdivs\scanneddocs\Waukesha\Subdivisions\
Subdivision documents will be named by their actual name, for example: Rogers Fifth Addition. The naming cannot have special characters within it. Use only numbers or letters when assigning the names. They will also be stored in pdf format.

For standardization of scanning documents, refer to the WisDOT standards for image creation and scanning. The following are excerpts from those documents:

Standard resolution for scanned images is 300 DPI for small plats and 200-300 DPI for 22 x 34 size plats. Central Office can only do 200 or 400, so we suggest doing 200 DPI, in that case. If you hire a consultant, use 300 DPI. Scan all plats at original size, do not reduce them.

Data Setup and Requirements for the Access Determination GIS Application

Shape File Setups

Driveway (Access Point) Shape Files

Drives shape files are poly lines.
The files were created by the following process:

1. GPS locations were collected, utilizing a Trimble ProXR (1-meter differentially corrected unit).
2. These points were collected in Wisconsin State Plane South Coordinates and converted in post processing to WTM NAD 83.
3. The point were then converted to lines relating the points to the state trunk network and extending them approximately 50 feet from the centerline location of the STN.
4. The CADD files were then converted to shape files.
5. Each county area is separated and stored in countywide files.

The dbf file contains the following fields:

FIELD NAME	TYPE	WIDTH
Shape	Polyline	
Entity	String	14
Layer	String	32
Level	Number	25
Elevation	Number	25
Color	Number	25
Drives	Number	25
Lognum	Number	25
RP	String	40
XCoord	Number	25
YCoord	Number	25
Drivenum	String	25
RQST_ID	Number	10

Naming Standard for Driveway Segments
Driveway numbering Legend: TT#RR #SC####

TT	Township (ex: 01 or 12)
#	Township direction (ex: N, S)
RR	Range (ex: 01 or 12)
#	Range direction (ex: E, W)
SC	Section
####	A number starting at one, for each individual driveway within that section

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regardless of the highway or direction. (ex: 0001)

Trans233 (ecsm) Shape File

Ecsm shape files are polygons.
These files are generated in one of two ways:

1. Some counties separate their certified survey maps into separate shape/cad/gis files. We then just acquire them and use them as a base to begin from.
2. Other counties store this information within their descriptions fields in their databases, which we connect to the mapping and then create the ecsm shape files from them, or merge properties together to create the files.

The dbf file contains the following fields:

FIELD NAME	TYPE	WIDTH
Shape	Polygon	
Lognum	Number	25
Csm_Num1	String	25
RQST_ID	Number	10

Subdivision Shape File

Subdiv shape files are polygons.
These files are generated in one of two ways:

1. Some counties separate their subdivisions into separate shape/cad/gis files. We then just acquire them and use them as a base to begin from.
2. Other counties store this information within their descriptions fields in their databases, which we connect to the mapping and then create the subdiv shape files from them, or merge properties together to create the files.

The dbf file contains the following fields:

FIELD NAME	TYPE	WIDTH
Shape	Polygon	
Lognum	Number	25
Subd_Name1	String	100
RQST_ID	Number	10

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Public Land Survey System Shape File

PLSS shape files are polygons. The PLSS files can come from several sources. Regional planning commissions typically maintain them, some counties maintain them, and the DNR has a statewide coverage of them.

The dbf file contains the following fields:

FIELD NAME	TYPE	WIDTH
Shape	Polygon	
Tag	String	32

Streets Shape File

Streets shape files are polylines. Street centerline files for local roads has been an issue throughout the project. The intent was to incorporate the local roads database, but the production of that system has been delayed and slow coming. In District 2, we utilized their GDT data sets. We trimmed the datasets to the county borders and created separate streets shape files for each county.

Properties Shape File

Props shape files are polygons. Props shape files are the most work out of the entire application. All counties have different configurations of file formats and fields included with them. We took a selection of counties in the District 2 area and polled them to see what they had for data and attribute information. With this information in mind, we developed a parcel attribute table set with assistance from a cross-functional group at District 2. The parcels from the county along with the tax assessment attribute information are compiled and converted into this format. We are currently working on automating that task for District 2.

The dbf file contains the following fields:

FIELD NAME	TYPE	WIDTH
Shape	Polygon	
PAR_NUM1	String	50
LAYER	String	32
LEVEL	String	32
ELEVATION	Number	25
COLOR	Number	25
ENTITY	String	25
PRCL_NB	String	50
TAX_ID_NB	String	13
FNM_1	String	50

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LNM_1	String	50
FNM_2	String	50
LNM_2	String	50
OWNR_1	String	30
OWNR_2	String	30
ORG	String	255
MADR_1	String	30
MADR_2	String	30
MLCT	String	21
MLST	String	2
MAIL_ZIP	Number	50
MAIL_ZIP_PLUS	String	255
SRCH_NM_1	String	20
SRCH_NM_2	String	15
DIR_1	String	1
HSE_1	String	5
DIR_2	String	1
HSE_2	String	5
SRCH_STR_ NM	String	20
MUNI	String	5
TAX_YR	Number	50
ALTV_TAX_KY	String	22
SCHL_DIST	String	4
DIST_CD_1	String	2
DIST_CD_2	String	2
DIST_CD_3	String	2
DIST_CD_4	String	2
DIST_CD_5	String	2
DIST_CD_6	String	2
DIST_CD_7	String	2
DIST_CD_8	String	2
DIST_CD_9	String	2
DIST_CD_10	String	2
TOT_ACRE	String	9
TOT_LAND	Number	50
TOT_IMPT	Number	50
TOT_VAL	Number	50
FMV	Number	50

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RO	Number	50
LGL_DESC_1	String	30
LGL_DESC_2	String	30
LGL_DESC_3	String	29
LGL_DESC_4	String	31
LGL_DESC_5	String	30
LGL_DESC_6	String	30
LGL_DESC_7	String	30
LGL_DESC_8	String	30
LGL_DESC_9	String	30
LGL_DESC_10	String	30
LGL_DESC_11	String	30
LGL_DESC_12	String	30
LGL_DESC_13	String	255
LGL_DESC_14	String	255
LGL_DESC_15	String	255
LGL_DESC_16	String	255

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WisDOT Standard Shape Files

The application uses several standard DOT shape files including:

Meta-Manager.shp from Central Office DOT
Counties.shp from DOA
CVT.shp from DOA
Water.shp from DOA
Raillines.shp from DOA
Sthbase.shp from STN Group
Connecthwy.shp from STN Group
Bridge.shp from STN Group
Row.shp from D2
Orthos.shp created from aerial photo boundaries
Accesstypes.shp from Central Office

Pilot Study

WisDOT decided to conduct a pilot study for an area that would have most of the controls that they can utilize in place. They chose the STH 60 corridor area in Washington County. This area incorporated several different situations and held to be a well selected section. The pilot project area included rural townships, a large community, a small community and some rural populated areas. There were several access controls in place throughout the project area, including: Wisconsin TRANS 233 areas, subdivision restrictions, certified survey map restrictions, 84.25 Access Control areas, 84.295 Access Control areas, freeways, rural state trunk highways and several different roadway networking configurations.

The pilot study had existing data available for the project, including digital subdivision and survey maps, roadway centerline mapping and other data sources. The area did not have parcel mapping available yet and this effort needed to be completed.

The study was successful and yielded some minor changes in the scope of the original project, including: adding the functionality of drawing tools, the development of a larger database application to include the functionality of creating forms/letters and other needed documentation.

Implementation

The project is still currently being finalized and over the last several years has developed into an extensive database application that is used throughout every step of Access review in several of the department's district offices. The application is also being looked at to be incorporated into a larger enterprise application for display of the relating data through an IMS application.