

# **Historic Property Workbench**

Maine Historic Preservation Commission

## **User Guide – Surveyor Role**

May 1, 2008

Version: 1.0

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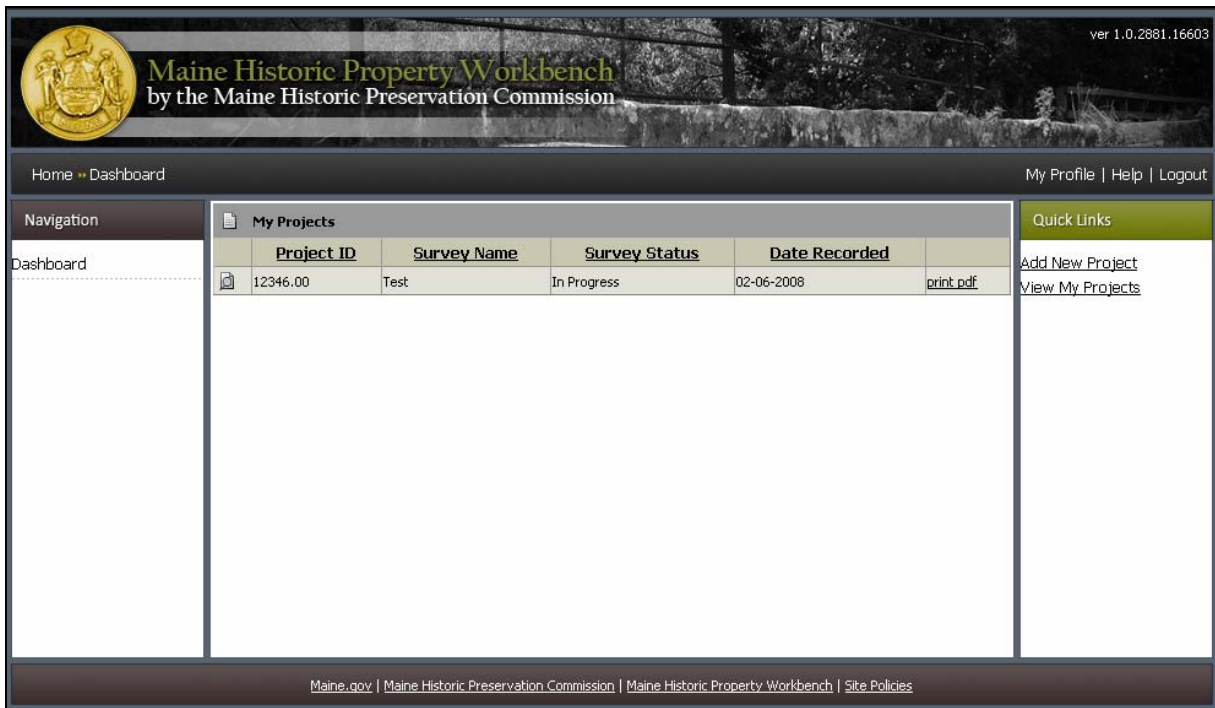
# 1 User Guide

## 1.1 Surveyor Overview

As a surveyor for the Maine Historic Preservation Commission (MHPC), users either survey properties on behalf of the Maine Department of Transportation (DOT), or for some other entity such as a municipality. The goal of a survey, whether of a single property or many, is to document the information known and submit it to the MHPC for review.

This online application is designed to collect the survey details in a standard and consistent manner, provide a means to produce those details in a consistent printed form, and provide a workflow for reviewing and accepting surveys as complete.

In general, the application behaves the same for all surveyors. There is an additional workflow step for DOT-affiliated surveys, in that DOT must review a survey before it goes to MHPC. The DOT is allowed to enter specific Project ID's that match the DOT tracking system, while all other surveys use a Project ID that is generated from the application. Other than these two distinctions, everything in this document applies to all users playing the role of Surveyor.



## 1.2 Accessing the Application

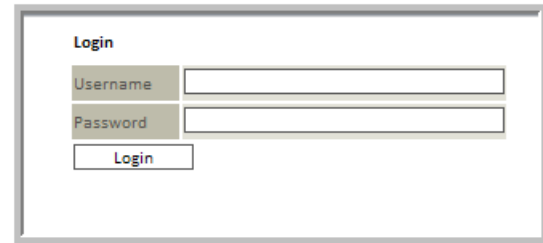
Open an Internet Explorer browser window and navigate to the following URL:

<http://mainedot-roadspray.maine.gov/me-historic/> for inside State WAN.

<https://mainedot-roadspray.maine.gov/me-historic/> for outside State WAN

### 1.2.1 Login

When you arrive at the workbench, the login window appears. Enter the username and password assigned to you, and click login.



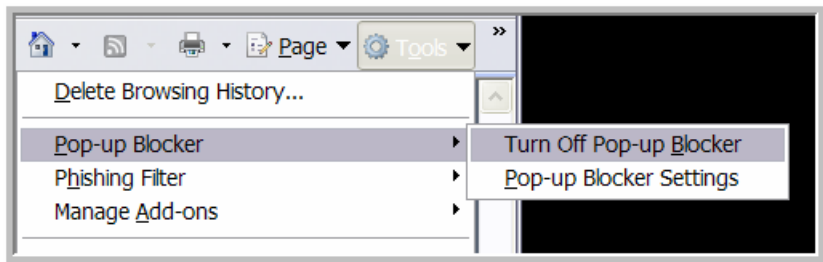
The screenshot shows a simple login form titled "Login". It contains two input fields: "Username" and "Password". Below these fields is a "Login" button. The form is enclosed in a thin grey border.

### 1.2.2 Adobe PDF Reader

Survey information is taken from the online form entries and formatted into PDF documents. It is these PDF documents that the surveyor will print for submission to MHPC. In order to read and print PDF documents, the user's machine must have Adobe Reader installed. Adobe Reader is available online for free from Adobe at <http://www.adobe.com/products/reader/>.

### 1.2.3 Disable Pop-up blocker

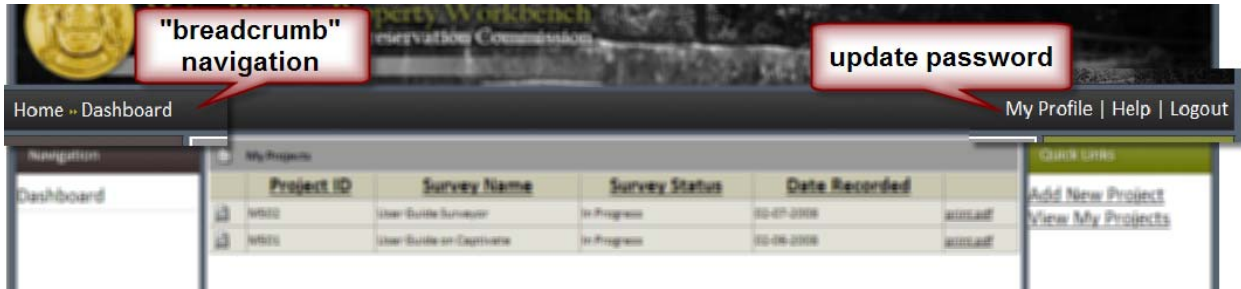
The print dialog uses pop-ups to display the print results, so users should disable pop-ups on their browser. If you are having problems printing, please confirm that pop-ups are disabled.



## 1.3 Basic Navigation

Across the top of the screen are tools available throughout the application for basic navigation and user control.

On the Left is a hierarchical list, called "breadcrumb" navigation, showing the user's location in the survey form workflow. Clicking an item in this list at any time will return the user to the location clicked.



On the right is the **My Profile** area where users can update their user name, password, and contact information such as e-mail address. The **Help** provides a link to this document, and **Logout** closes the active session and returns the user to the login screen.

The "Modify Profile" form contains the following fields and values:

- First Name: Thomas
- Last Name: Marcotte
- Role: Surveyor
- Affiliation: MDOT
- Login Name: tmarcotte
- Login Password: (Leave empty to keep password un-changed.)
- Confirm Password: (Leave empty to keep password un-changed.)
- Email: Thomas.Marcotte@maine.gov
- Phone (Daytime):
- City:
- State: ME

Buttons for "Submit" and "Cancel" are located at the bottom right of the form.

## 1.4 Project Navigation

The main area of the screen provides a framework for entering and viewing data in a hierarchy. It is here that the contents of your survey are summarized and grouped, and content is entered into individual survey forms.

Project ID	Survey Name	Survey Status	Date Recorded	
12346.00	Test	In Progress	02-06-2008	print.pdf
012777.00	Turner	In Progress	02-07-2008	print.pdf

The "My Projects" Dashboard

The “breadcrumb” navigation panel is useful in confirming your location in the hierarchy. Images below demonstrate the breadcrumb path at each level:

Home >> Projects

The “[My Projects](#)” Dashboard – a summary list of all projects entered by a single user. The Dashboard is the starting off point for a new survey, or the place to review a list of existing projects that are underway. All\* surveys that have been entered by the active surveyor are listed here (\*except those that have been archived by the MHPC).

Home >> Projects >> Survey Details

An [Individual Project/Survey](#) = “Project Details” – a summary list of all forms entered for a single project/survey. A project/survey can contain multiple properties, and multiple forms for each property.

Home >> Projects >> Survey Details >> Edit Form

[Individual Forms](#) – data entry screens for individual survey forms - Building/Structure, Barn/Ag, and Farmstead.

- A form’s sub-forms can be [continuation forms](#), as well as Barn/Ag and Building/Structure forms within a Farmstead.

Home > Projects > Survey Details

My Profile | Help | Logout

Navigation

Dashboard

Quick Links

Add New Project

View My Projects

**Project Details**

Project ID: 012777.00

Survey Name: Turner

Date Recorded: 02-07-2008

Surveyor: Marcotte, Tom

Status: In Progress

Survey Forms

Type	Survey Map No.	Last Updated	Surveyor	Status	
FARM_FORM 1		02-07-2008	Marcotte, Tom	In Progress	<a href="#">print pdf</a>
HBSS_FORM 2		02-07-2008	Marcotte, Tom	Form Complete	<a href="#">print pdf</a>
CONT_FORM 2		02-07-2008	Marcotte, Tom	Form Complete	<a href="#">print pdf</a>
BARN_FORM 3		02-07-2008	Marcotte, Tom	In Progress	<a href="#">print pdf</a>

The Individual Project/Survey

NOTE: The “Last Updated” date is listed in the Project Details (form summary list view), to help users understand when their content was last updated. This date is system-assigned and should not be confused with the “Date Recorded” value that is user-defined within a survey Form.

Home » Projects » Survey Details » Edit Form

My Profile | Help | Logout

Navigation

Dashboard

Quick Links

Add New Project

View My Projects

**Edit Sub-Form**

Save Next..

Project ID: 012777.00

Type: Barn/Agricultural

Survey Map No.: 3

1. Property Name (Historic): Nezinscot Farm

2. Property Name (Other):

3. Street E911: 284-286 Turner Center Road

Street RTE: Route 117

Street TOPO:

4. Town: Turner

Map Point

Change Map Point

5. County: Androscoggin

6. Date Recorded: 11-02-2005 (MM-DD-YYYY)

7. Surveyor: 344 - TomMarcotte

8. Owner Name:

9. Owner Address:

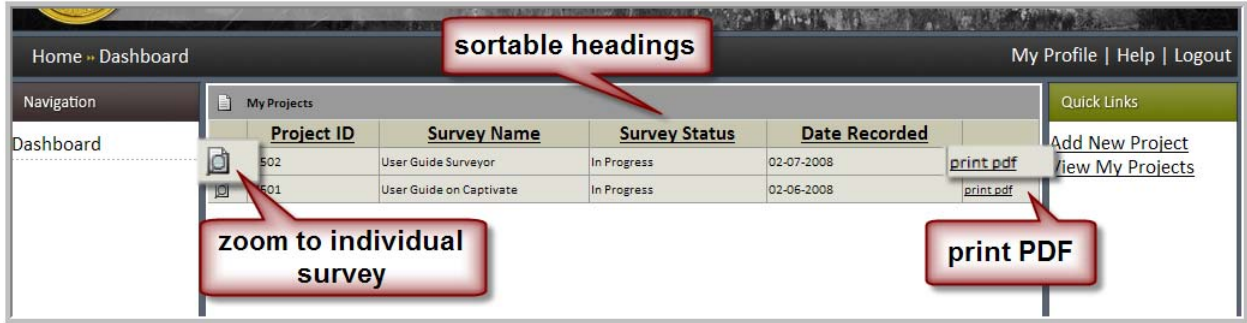
Save Next..

Individual Form


### 1.4.1 Summary Lists

The summary lists in the “My Projects” and “Project Details” area provide some common navigation functions: zoom/drill-down a level, sort, print, and delete.





Zoom/Drill-Down a Level

The magnify glass icon  to the left of an entry indicates there is a level below. Click this from the “My Projects” view to reach the “Project Details” and from “Project Details” into an individual form.

Sort

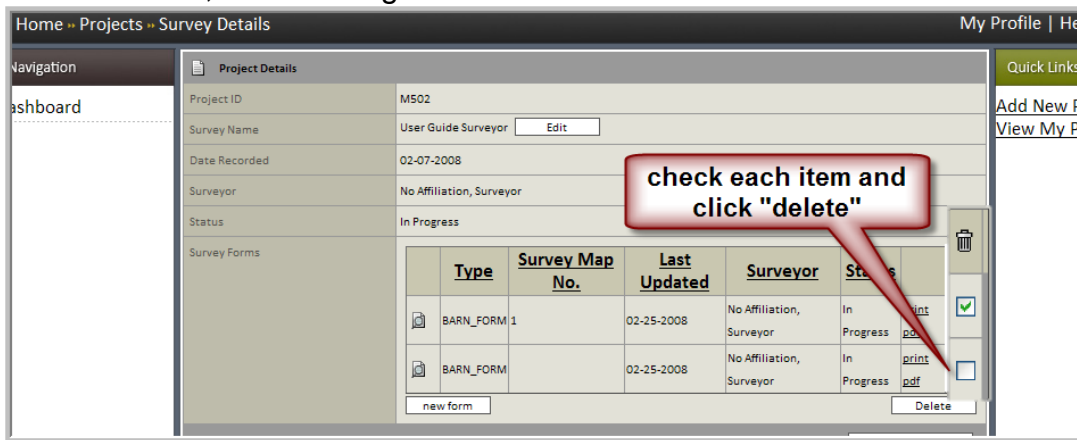
Lists of surveys or forms can be sorted by their column headings, by clicking the underlined heading name.

Print

The **print pdf** link [print pdf](#) generates a multipage PDF, which the user can then print or save as appropriate. The content of the PDF is governed by where in the project hierarchy it is generated. See more in section 1.5.7 below.

Delete

Items can be removed from the system by clicking the checkbox under the trashcan in each data row, then clicking **delete**  to confirm.

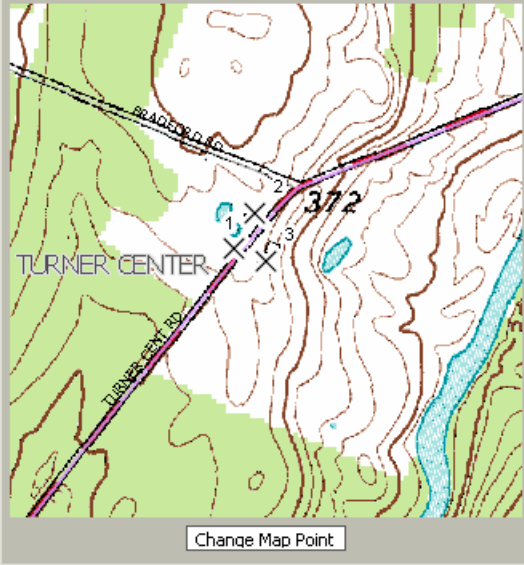


**1.4.2 Data Entry Forms**

The data entry forms share common navigation functions and behavior. Though the content of each form is unique and the data entry fields will differ from one form to the next, the behavior of the forms is consistent.

Edit Sub-Form

Save
Next..

Project ID	012777.00
Type	Barn/Agricultural
Survey Map No.	3
1. Property Name (Historic)	Nezinscot Farm
2. Property Name (Other)	
3. Street E911	284-286 Turner Center Road
Street RTE	Route 117
Street TOPO	
4. Town	Turner
Map Point	
5. County	Androscoggin
6. Date Recorded	11-02-2005 (MM-DD-YYYY)
7. Surveyor	344 - TomMarcotte
8. Owner Name	
9. Owner Address	

Save
Next..

**Save**

The **Save** function saves all Form content, so that a user can come back to the application at a later time. To avoid losing data, users should use this button often, and certainly when walking away from the computer. In this way, accidental loss of information does not occur because the internet connection is lost or the session times out.



**Next and Previous**

At the top and bottom of each form are buttons to navigate the user to the next page in the form, or the previous one. If there is no **Previous** button, then you are at the first page in the form; likewise if there is no **Next** button, then you are on the last page.



**Picklists and Check-boxes**

A picklist of valid values is provided in a white box with a down arrow. Picklists are provided for data fields that allow only one value per field.



If multiple values can be used, the options show as check-boxes.

66. Primary Use (Historic)

<input type="checkbox"/> ANIMAL SHED	<input type="checkbox"/> HOP HOUSE	<input type="checkbox"/> SILO
<input type="checkbox"/> BARN MIXED USE	<input type="checkbox"/> ICE HOUSE	<input type="checkbox"/> SMOKE HOUSE
<input type="checkbox"/> CHICKEN COOP	<input checked="" type="checkbox"/> MILK HOUSE	<input type="checkbox"/> SPRING/WELL HOUSE
<input type="checkbox"/> CIDER HOUSE	<input type="checkbox"/> OTHER	<input type="checkbox"/> STABLE/LIVERY
<input type="checkbox"/> CORN CRIB	<input type="checkbox"/> PIGGERY	<input type="checkbox"/> SUGAR SHACK
<input type="checkbox"/> DAIRY BARN	<input type="checkbox"/> POTATO BARN	<input type="checkbox"/> WAGON SHED
<input type="checkbox"/> GREENHOUSE	<input type="checkbox"/> POULTRY BARN	<input type="checkbox"/> WORKER HOUSING
<input type="checkbox"/> HAY BARN		

Many fields provide an **Other** option, where custom values can be entered by the user. A white data entry box will appear *after* the user selects **Other** from the provided list of options.

66. Primary Use (Historic)

<input type="checkbox"/> ANIMAL SHED	<input type="checkbox"/> HOP HOUSE	<input type="checkbox"/> SILO
<input type="checkbox"/> BARN MIXED USE	<input type="checkbox"/> ICE HOUSE	<input type="checkbox"/> SMOKE HOUSE
<input type="checkbox"/> CHICKEN COOP	<input type="checkbox"/> MILK HOUSE	<input type="checkbox"/> SPRING/WELL HOUSE
<input type="checkbox"/> CIDER HOUSE	<input type="checkbox"/> OTHER	<input type="checkbox"/> STABLE/LIVERY
<input type="checkbox"/> CORN CRIB	<input type="checkbox"/> PIGGERY	<input type="checkbox"/> SUGAR SHACK
<input type="checkbox"/> DAIRY BARN	<input type="checkbox"/> POTATO BARN	<input type="checkbox"/> WAGON SHED
<input type="checkbox"/> GREENHOUSE	<input type="checkbox"/> POULTRY BARN	<input type="checkbox"/> WORKER HOUSING
<input type="checkbox"/> HAY BARN		

Other:

67. Primary Stylistic Category

68. Height

69. Plan

70. Primary Structural System

NEW ENGLAND  
OTHER  
ROUND

OTHER

19TH/20TH C. REVIVAL  
ARTS & CRAFTS  
BUNGALOW  
COLONIAL  
FEDERAL  
GOTHIC REVIVAL  
GREEK REVIVAL  
HIGH VIC GOthic  
ITALIANATE  
OTHER  
QUEEN ANNE  
SECOND EMPIRE  
SHINGLE STYLE  
STICK STYLE  
VERNACULAR

67. Primary Stylistic Category: OTHER Other:

68. Height:

**White Boxes for Data Entry**

A white box is a field awaiting user input.

284-286 Turner Center Road

**Red Boxes for Correction Comments**

Red boxes will show if a form has been rejected. The red boxes contain the reviewer's comments and suggestions about corrections that need to be made to the form.

46. Farm Acreage: 250 acres  
please recalculate acreage; 250 seems low

47. Number of Structures/  
Sites, incl. house: 11

48. Inventory Numbers for: 2-6

**Data Format Tips**

Most data fields allow free-form text entry, but in a few cases a date or number is required. In these cases, the user is prompted to enter data in a particular format. For example, while many dates allow an estimation or range such as Estimated Construction Date, the Date Recorded must be the exact date the survey was made, and the form prompts with a date format.

11-02-2005 (MM-DD-YYYY)

**System-assigned/Default Values**

There are a few cases when a user is not expected to enter content because a value already exists. Some values are system-generated (Surveyor, Quad Name, UTM coordinates), and others have been entered by the user, but can no longer be edited (Project ID). And, in the case of continuation forms, the values are carried forward from the parent Form, and can only be changed by editing the parent form.

The "Surveyor" field is always populated with the Surveyor's name, based on the logged-in user's name.

7. Surveyor: 344 - TomMarcotte

The 7.5' USGS quad map name, and the UTM coordinates for the map point are automatically populated in the form based on the location mapped. These fields are grayed-out because the user cannot manually enter content in these fields.

62. Quadrangle	Augusta
63. UTM Northing	4907050.1423
64. UTM Easting	439477.7546

Text entry boxes in a Continuation Form are no longer white because the content is being carried-forward from the parent Form.

**New Sub-Form** Save Next..

Project ID: M502

Type: Continuation

Survey Map No.: 1

1. Property Name (Historic): Nezinscot Farm

2. Property Name (Other):

3. Street ES11: 284-286 Turner Center Road

Street RTE: Route 117

Street TOPO:

4. Town: Turner

5. County: Androscoggin

6. Date Recorded: 11-02-2005 (MM-DD-YYYY)

7. Surveyor: 346 - SurveyorNo Affiliation

8. Owner Name:

9. Owner Address:

Save Next..

**Required Fields**

If required fields are missing data or otherwise require editing (such as an improperly formatted date), then red text will prompt the user with guidance.

**New Project**

Project ID: 012777.00  
Enter a new PIN number or leave blank.

Survey Name:  
Please enter a Survey Name

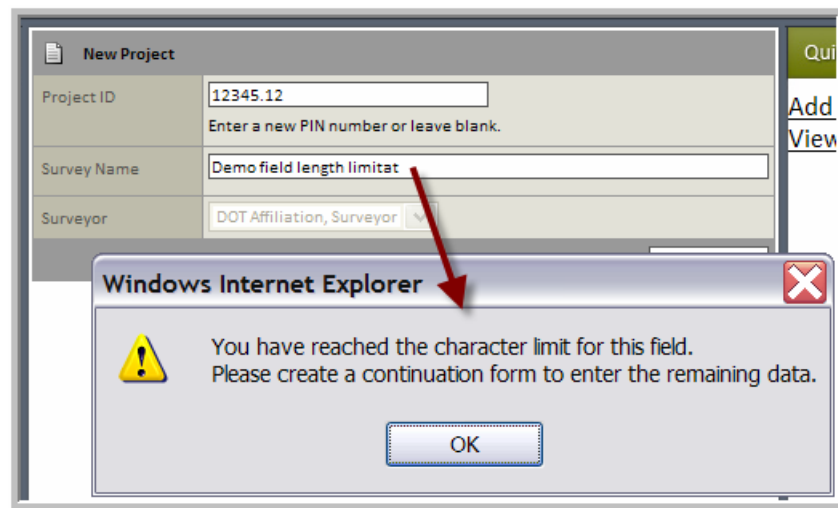
Surveyor: Marcotte, Tom

Save

The “Map Point” is a required field; a survey Form cannot be completed until a point is mapped. The point must be assigned a “Survey Map Number” that corresponds to the Form feature as indicated on any sketches. Projects are not allowed to have duplicate survey map numbers; in other words, the application will prompt the user when a number has already been used in that project. See more on mapping points in section 1.4.3 below.

## Field Lengths

Just as with entering text into a handwritten form, there is a limited amount of space available on the digital forms. If a user tries to enter more information than what will fit in the space provided, the application prompts “you have reached the character limit for this field”. In this case, the user should either shorten their entry, or continue entering content on a Continuation Form. For more information on how to cross-reference your additional text back to a specific field into which you couldn’t fit your entire content, see the Workflow Section on Sub-Forms: [Continuation Forms](#).



## Upload Images

Forms can have a photo, a sketch, or both, depending on the form. The process for uploading any one of these image types is the same. It is a three step process:

- 1) **Browse** to the image file on your local machine
- 2) Select if the image to be uploaded is a photo or not (if it is a sketch or framing cross section)
- 3) **Upload** the image. You'll know the image was uploaded successfully because a small version of it will appear in the Form.

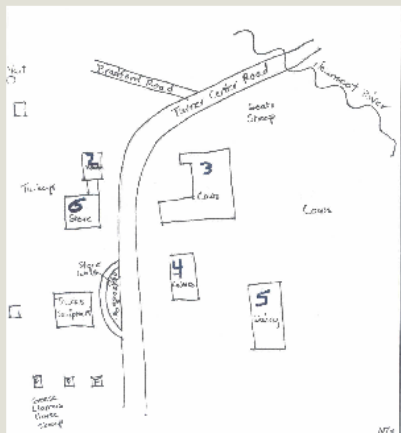
The screenshot displays the 'Photographs' section of the Historic Property Workbench. It features a form with two rows: 'Photograph' and 'Framing Cross Section'. Each row includes a text input field for a file path, a 'Browse...' button, and an 'upload' button. Below the form is a summary view showing a thumbnail of a barn, a 'delete image' link, and the text 'Image Type: Photo'. Red arrows labeled 1, 2, and 3 point to the 'upload' button, the 'Is the picture a Photo?' question, and the 'upload' button in the summary view, respectively.

Step 2 in the upload process is important because it controls how the image is positioned and sized in the PDF output file. In general, photos are smaller and are in a landscape orientation, while non-photos are larger and are in a portrait orientation.

### Summary Page

The last page of each form provides a summary view of the form's contents. This is intended to provide the user an efficient way to quickly review their form for completeness before submitting it for review.

Farmstead Form Step 3 of 3
..Previous Complete Form

Project ID	<u>012777.00</u>																										
Summary	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%; padding: 2px;">45. Primary Use (Historic):</td> <td style="padding: 2px;">MIXED USE</td> </tr> <tr> <td style="padding: 2px;">46. Farm Acreage:</td> <td style="padding: 2px;">250 acres</td> </tr> <tr> <td style="padding: 2px;">47. Number of Structures:</td> <td style="padding: 2px;">11 structures</td> </tr> <tr> <td style="padding: 2px;">48. Inventory Numbers:</td> <td style="padding: 2px;">2-6</td> </tr> <tr> <td style="padding: 2px;">49. Other Structures:</td> <td style="padding: 2px;">A. structures for Geese, llama, horses, sheep <span style="float: right;">▼</span></td> </tr> <tr> <td style="padding: 2px;">57. Historical Drawings:</td> <td style="padding: 2px;">n <span style="float: right;">▼</span></td> </tr> <tr> <td style="padding: 2px;">58. More Than 100 Years:</td> <td style="padding: 2px;">y - c1900</td> </tr> <tr> <td style="padding: 2px;">60. Farm Integrity:</td> <td style="padding: 2px;">ORIGINAL</td> </tr> <tr> <td style="padding: 2px;">61. Setting:</td> <td style="padding: 2px;">RURAL/UNDISTURBED</td> </tr> <tr> <td style="padding: 2px;">62. Quadrile Map Used:</td> <td style="padding: 2px;">Turner Center</td> </tr> <tr> <td style="padding: 2px;">63. UTM Northing:</td> <td style="padding: 2px;">4902300.9833</td> </tr> <tr> <td style="padding: 2px;">64. UTM Easting:</td> <td style="padding: 2px;">401074.402</td> </tr> <tr> <td style="padding: 2px;">65. Facade Direction:</td> <td style="padding: 2px;">S</td> </tr> </table>	45. Primary Use (Historic):	MIXED USE	46. Farm Acreage:	250 acres	47. Number of Structures:	11 structures	48. Inventory Numbers:	2-6	49. Other Structures:	A. structures for Geese, llama, horses, sheep <span style="float: right;">▼</span>	57. Historical Drawings:	n <span style="float: right;">▼</span>	58. More Than 100 Years:	y - c1900	60. Farm Integrity:	ORIGINAL	61. Setting:	RURAL/UNDISTURBED	62. Quadrile Map Used:	Turner Center	63. UTM Northing:	4902300.9833	64. UTM Easting:	401074.402	65. Facade Direction:	S
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58. More Than 100 Years:	y - c1900																										
60. Farm Integrity:	ORIGINAL																										
61. Setting:	RURAL/UNDISTURBED																										
62. Quadrile Map Used:	Turner Center																										
63. UTM Northing:	4902300.9833																										
64. UTM Easting:	401074.402																										
65. Facade Direction:	S																										
Site Plan:	 <p style="text-align: center; font-size: small;">Image Type: Sketch</p>																										
Survey Sub-Forms	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 20%;">Type</th> <th style="width: 20%;">Last Updated</th> <th style="width: 15%;">Surveyor</th> <th style="width: 20%;">Status</th> <th style="width: 15%;"></th> </tr> </thead> <tbody> <tr> <td></td> <td>HBSS_FORM</td> <td>02-07-2008</td> <td>344</td> <td>Form Complete</td> <td><a href="#">print pdf</a> <input type="checkbox"/></td> </tr> <tr> <td></td> <td>BARN_FORM</td> <td>02-07-2008</td> <td>344</td> <td>Form Complete</td> <td><a href="#">print pdf</a> <input type="checkbox"/></td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>new form</span> <span>Delete</span> </div>		Type	Last Updated	Surveyor	Status			HBSS_FORM	02-07-2008	344	Form Complete	<a href="#">print pdf</a> <input type="checkbox"/>		BARN_FORM	02-07-2008	344	Form Complete	<a href="#">print pdf</a> <input type="checkbox"/>								
	Type	Last Updated	Surveyor	Status																							
	HBSS_FORM	02-07-2008	344	Form Complete	<a href="#">print pdf</a> <input type="checkbox"/>																						
	BARN_FORM	02-07-2008	344	Form Complete	<a href="#">print pdf</a> <input type="checkbox"/>																						

..Previous
Complete Form



### 1.4.3 Mapping a Point

Each main form type, Barn, Building and Farmstead require that a point be placed on the map corresponding to that feature’s location. Each data entry form provides a specific dialog for mapping points that will take the user into an embedded mapping application. There are three steps to mapping a point:

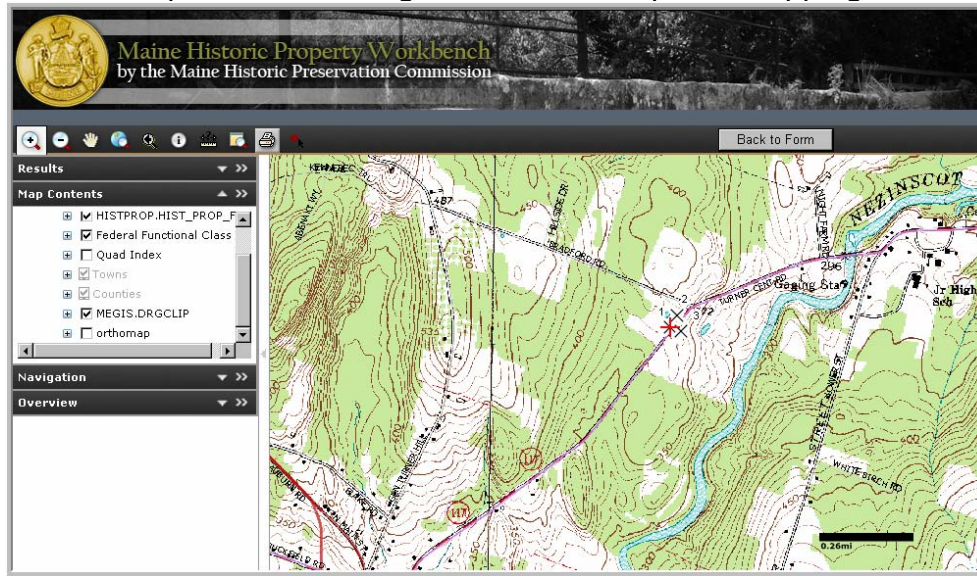
- 1) Enter a Survey Map No. – This number is defined by the user, and per the MHPC Guidelines should be unique to a Project/Survey, and should correspond to any map numbers provided on sketch images to be uploaded to the survey. The application will prompt the user to pick another number if the user tries to enter a number already used in the active Project/Survey.

Project ID	012777.00
Type	Farmstead
Survey Map No.	1
1. Property Name (Historic)	Nezinscot Farm
2. Property Name (Other)	
3. Street E911	284-286 Turner Center Road
Street RTE	Route 117
Street TOPO	(if your text is too long, the system will prompt to revise your entry)
4. Town	Turner
Map Point	Plot Map Point

- 2) Pick a Town Name – The towns are listed alphabetically, and are provided as a picklist of values that match the map.

The user can either scroll down the list, or start typing the name in the white box (recommended). It may take some practice, but if characters are typed quickly in succession, the selected value in the list should more closely match your desired town, then the up/down arrows on the user’s keyboard, or the scroll bar on the form can be used to select the exact desired name.

3) Plot the Map Point – Clicking this button will open a mapping window.



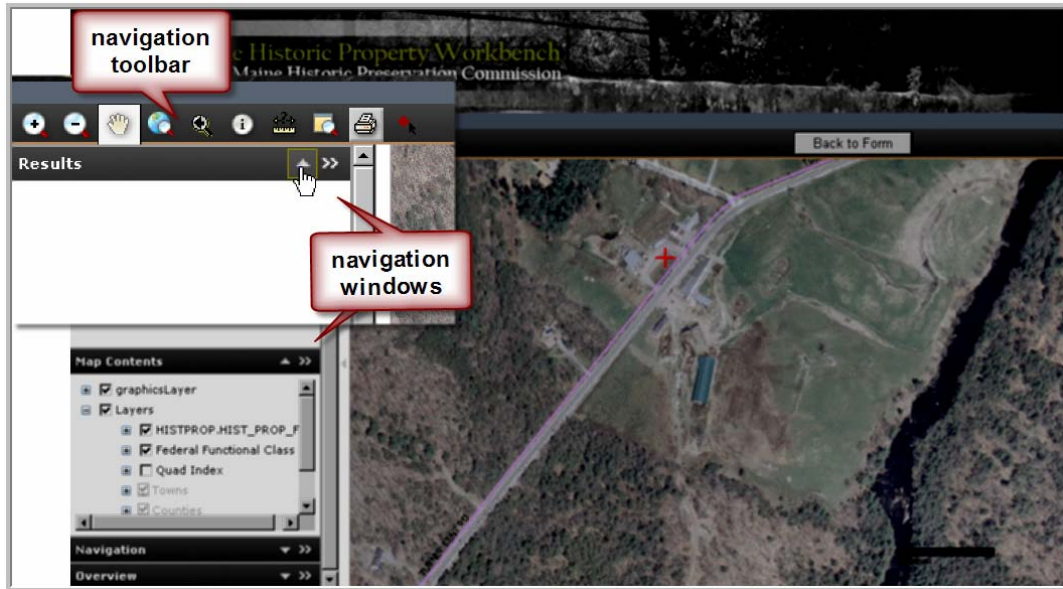
It is important to note that if the map session times out the user must close their browser and re-login to the Workbench.

### The Mapping Window

The map window provides navigation tools to the top and left of the map and a user can return to their data entry form using the button on the top right “Back to Form”.

The toolbar at the *top left* provides tools that enable the user to manipulate the map and quickly perform tasks such as adding a point and printing.

The navigation windows *along the left margin* provide information about the map being viewed. These windows can be expanded and contracted using the arrows in the header bars. The windows can be resized by placing the mouse on the edge between two windows and, while holding the left mouse button down, dragging the window to resize it.





If the map ever seems hung, or your cursor seems stuck in a tool, use the “Escape” key on your keyboard to reset the current function/activity.


### Map Navigation Toolbar

The toolbar provides common functions for the map. The user will get more familiar with the performance of these tools with experience, and the map can always be re-set by exiting back to the form and starting over at the **Plot Map Point**.




**Zoom-In**  The user can drag a box around an area of interest, or do single clicks to zoom in a fixed extent.

**Zoom-Out**  The user will likely only want to do single clicks to zoom out, but dragging a box will increase the scale of the zoom.

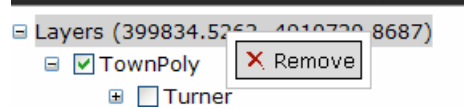
**Pan**  To move the map view over in one direction, activate the “Pan” tool, and click and hold the hand icon while dragging in the direction you want the map to move. The area where the map was will refresh with new content.


**Zoom to Full Extent**  This will return the map to the full extent of Maine.

**Previous Extent**  This will take the user back to the previous extent of the map.

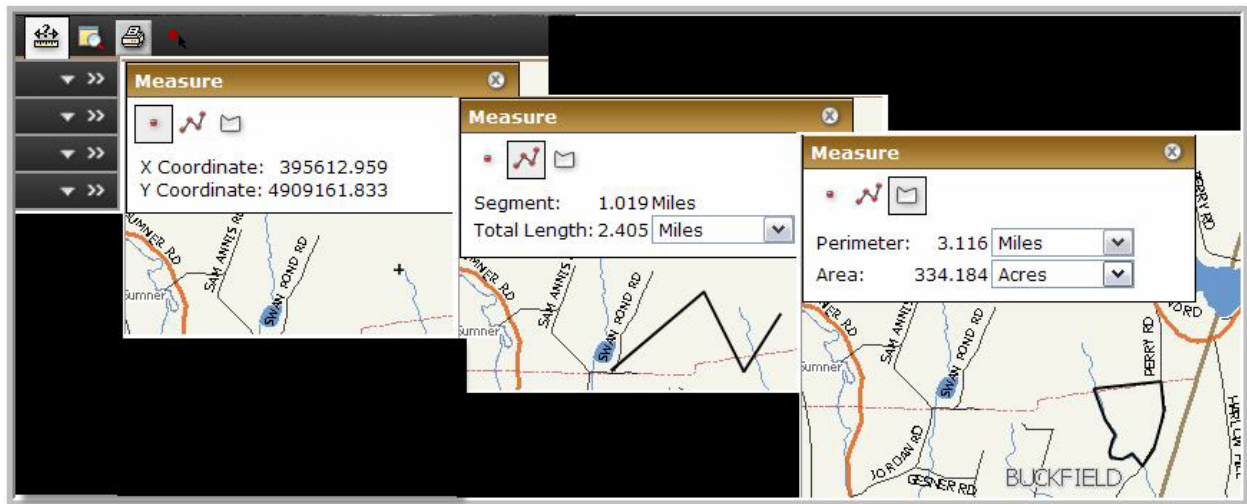
**Identify**  This tool is used to query the map database for additional information that may be helpful in understanding the map contents. For example, a point clicked with this tool will initiate a map query, which will then return a list of information about the map layers.


To remove information from the results list, right click the mouse on each entry and choose “remove”.




**Measure**  This tool can be used to place points and return an x,y coordinate, lines and return segment lengths and total length, and polygons to return perimeter and area in various units of measure. A single left mouse click places the point or places the first point in the line or polygon. On lines and polygons, additional single clicks add another stopping point (vertex) along the feature being measured. Double-click ends the line/measure process.


If the line seems to stick to your mouse, the “escape” key can also be used to end the measuring process.



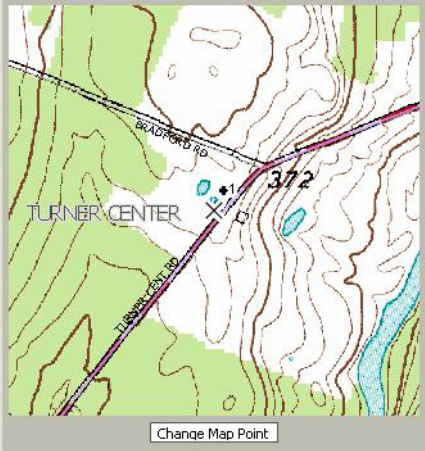
**Magnifier Window**  This brings up a small window that can be moved over the map to provide a more detailed view of a small portion of the map. It becomes active once it is moved into position.

This tool can be used for general navigation around the map; however a survey form point cannot be placed inside this window. Survey points must be placed in the main map window.

**Print Map to PDF**  This will launch a process that generates a PDF of the current map extent. In order to operate correctly, this tool requires that pop-ups are allowed in your web browser.

**Add a Map Point**  With this tool active, clicking on the map will place a survey map point: the map will re-center on the position clicked, and a red **X** will appear to mark the point.

If the red **X** doesn't accurately mark the desired location, then the user can simply click again on the map and the new position will replace the old one. Only one point can be mapped per mapping session. After placing a point at a desired location, click the **Back to Form** button at the top right of the screen. The user will be returned to the active form, and the point just placed will show up on a map in the form, with the survey map number label on the map.

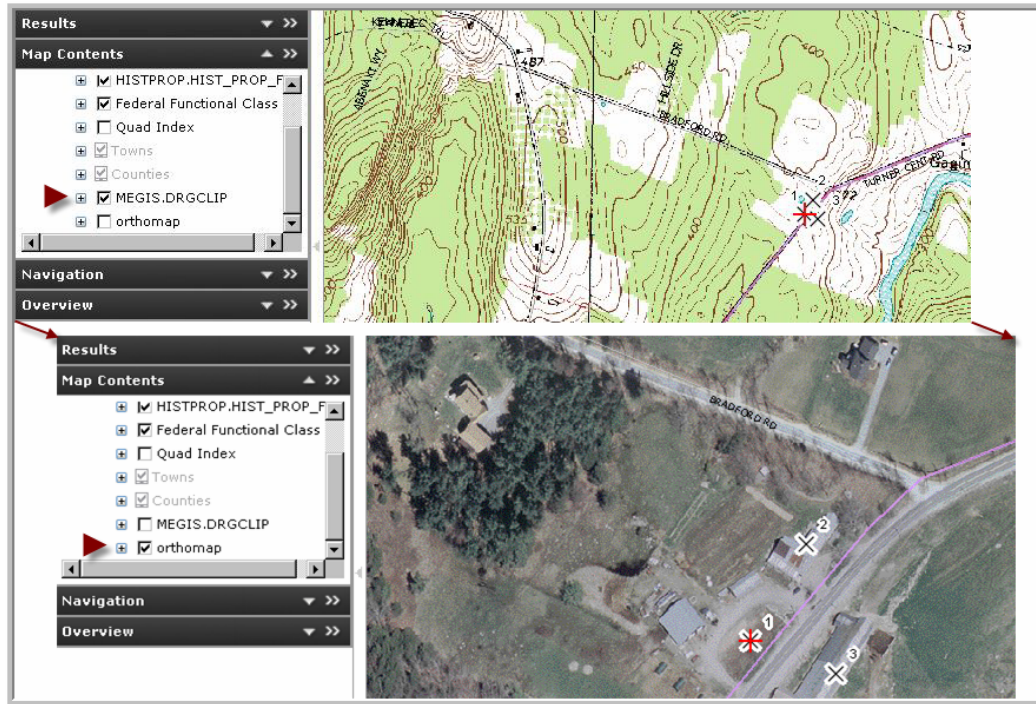
1. Property Name (Historic)	<input type="text" value="Nezinscot Farm"/>
2. Property Name (Other)	<input type="text"/>
3. Street E911	<input type="text" value="284-286 Turner Center Road"/>
Street RTE	<input type="text" value="Route 117"/>
Street TOPO	<input type="text" value="(if your text is too long, the system will prompt to revise your entry)"/>
4. Town	<input type="text" value="Turner"/>
Map Point	

## Map Contents

The Map Contents window provides a list of map layers available in the view.

If a layer is grayed-out it is not visible at the current scale (zoom out or in to make that layer visible).

If the check box has a check, that layer should be visible in your map.



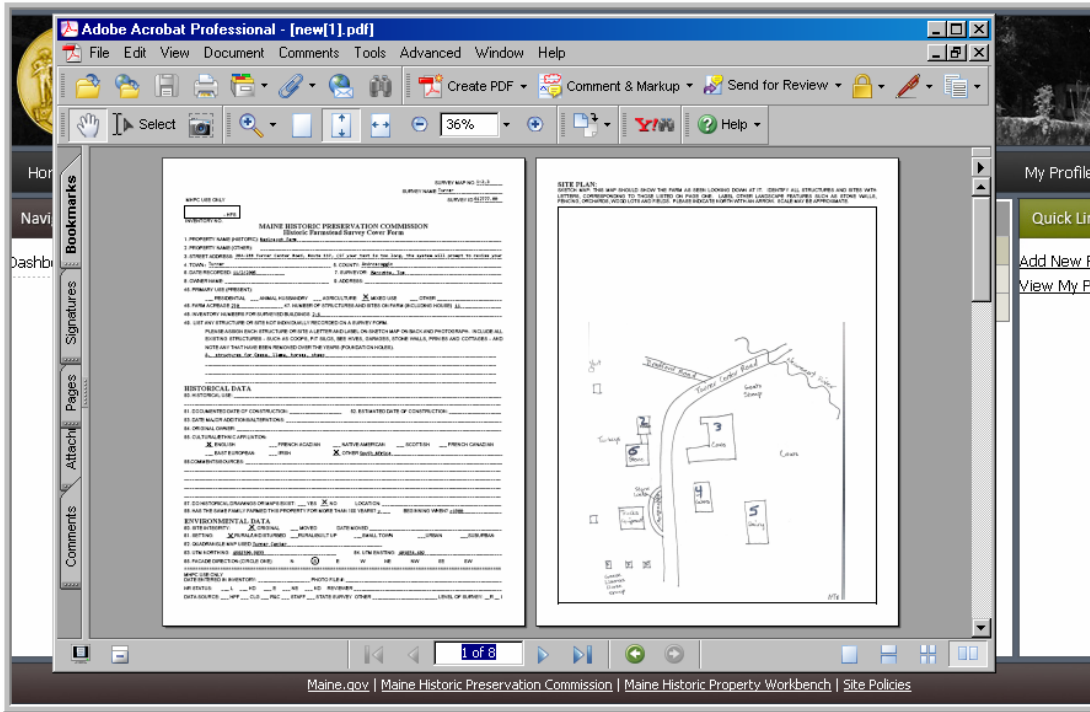
#### 1.4.4 Printing

The application provides for surveys, forms, and maps to be printed to PDF files, and then saved to the user's machine or printed.

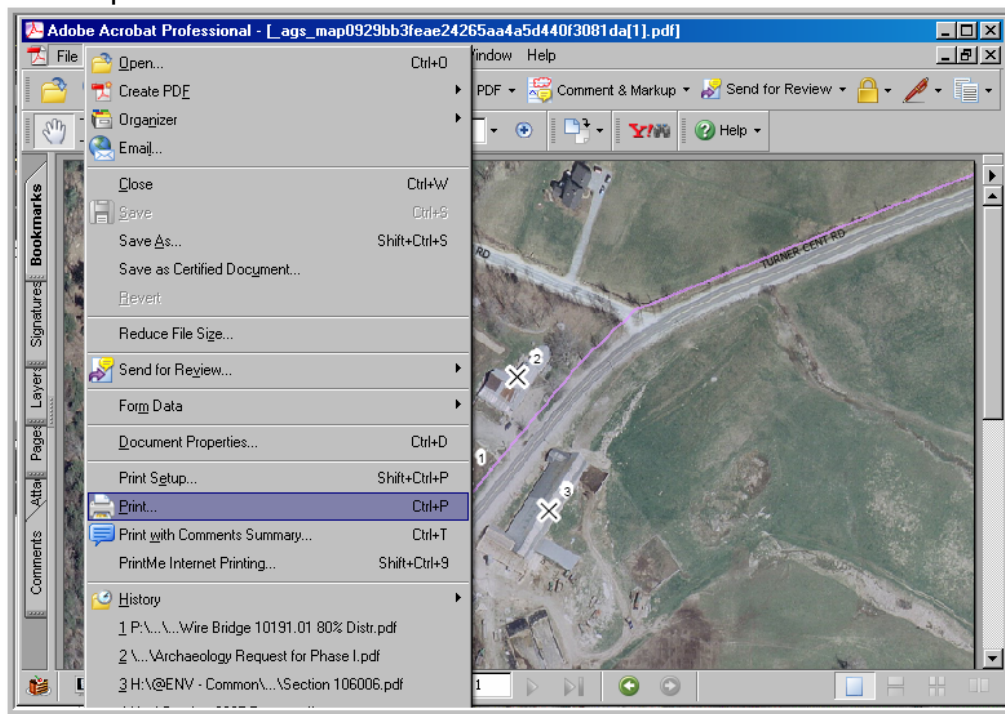
The **print pdf** link [print.pdf](#) generates a multipage PDF, which the user can then print or save as appropriate. The content of the PDF is governed by where in the project hierarchy it is generated. A PDF printed at the level of a form will only have 2 pages, while one printed at the level of a project/survey with 4 forms will have 8 pages.

The PDF's are created to mimic the strict printed format required by the MHPC. As such, pages are intentionally left blank in Continuation Forms, and sketches and photos are resized to fit within the space provided in the corresponding form. Further information about the printing requirements can be found in the MHPC Guidelines document located at: [http://www.maine.gov/mhpc/architectural\\_survey/survey\\_guidelines.html](http://www.maine.gov/mhpc/architectural_survey/survey_guidelines.html).

It is the user's responsibility to print the PDF documents double-sided, by changing the settings of the local printer's "Properties".

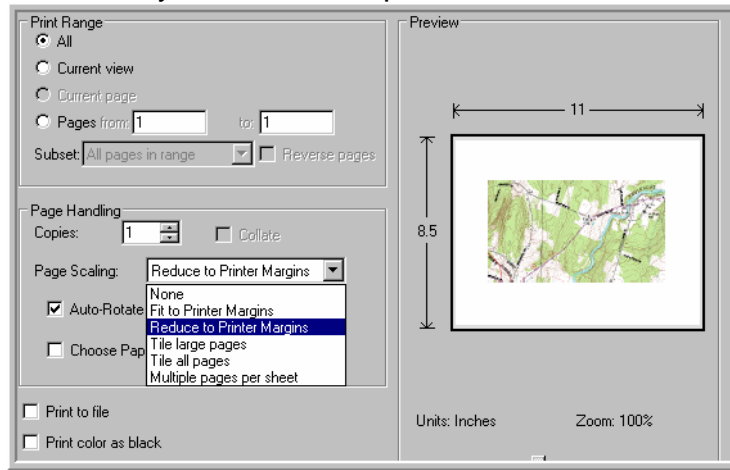


Once the PDF document or map is created, the Adobe PDF window and the file will automatically open. The user should then select the File >> Print dialog and print as usual to a local printer.



The map will print exactly what is visible on the mapping window screen, and will mimic the dimensions of the window. The user is encouraged to experiment with resizing the browser window and printing the maps to PDF to optimize the layout to fit the specific

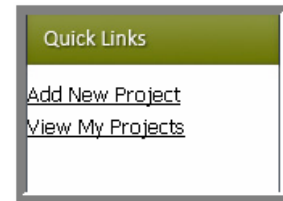
need. There are also orientation options provided when printing the PDF that give the user more control over the layout of the final print.



## 1.5 Workflow

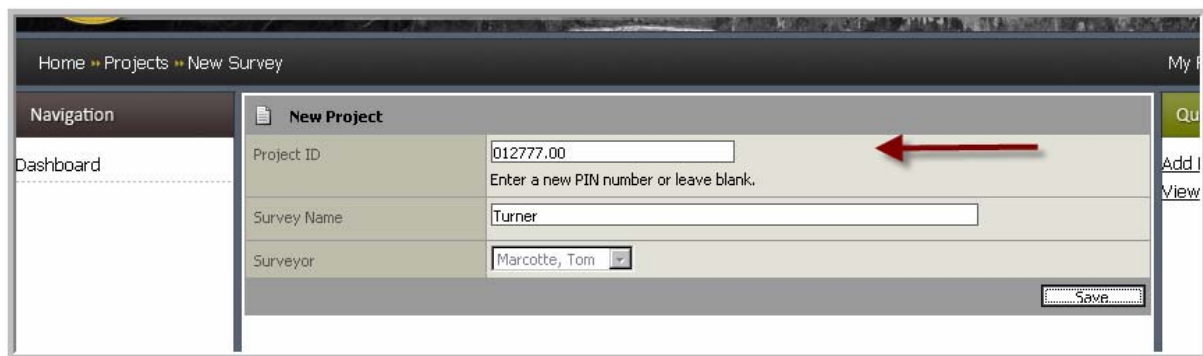
### 1.5.1 Add a New Project/Survey

A New Project/Survey is added using the Quick Link that is always available in the right margin.



Each new project requires a Project ID. For surveyors affiliated with DOT, this field is available for data entry; for non-DOT surveyors, the Project ID is automatically generated by the application.

If you are a surveyor who completes DOT-affiliated survey projects, you will always be prompted for a Project ID. This ID is for a DOT-approved Project ID number (as a PIN or PSN), and should be left blank if a survey is not being completed specifically for DOT.

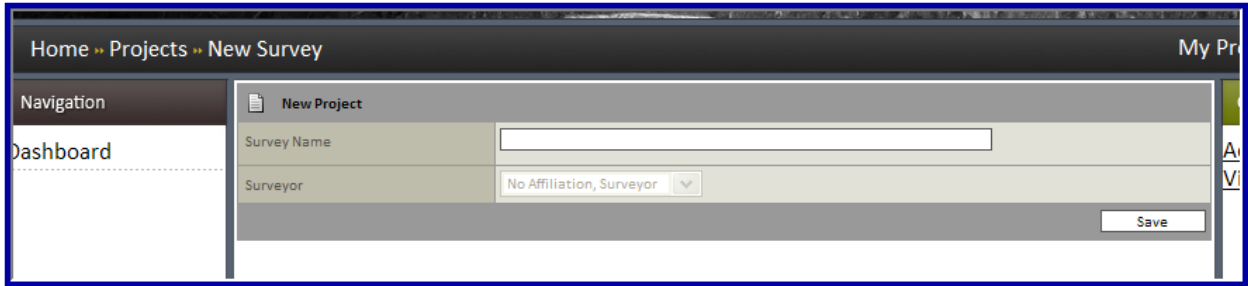


Enter a Name for the Survey, and click **Save**.



Once a Project ID is entered, it cannot be changed. If a user mistypes a Project ID, that survey should be deleted, and a new one created with the proper Project ID.

If you are a non-DOT surveyor, you will only be prompted for a survey name, because your Project ID will be automatically assigned by the system.



### 1.5.2 Add a New Form

A New Form is added from within an existing Project/Survey.

Once you have created a New Survey, the Project Details page will show a Status of “In Progress” and a button will be available to enter Survey Forms.



Clicking the **New Form** button will take the user to the first page of a blank Form. The first picklist allows the user to select the type of form to create. The format of subsequent form pages is governed by choice of form type.

REMEMBER: there is no choice in the **New Form** for Continuation Forms because a [Continuation Form](#) is created *within* the form to which it relates. The continuation form can be added from the last page within a primary (barn, building, or farm) form.

Home » Projects » Survey Details » New Form

Navigation

Dashboard

**New Form**

Save Next..

Project ID: 012777.00

Type: Barn/Agricultural (dropdown menu with options: Barn/Agricultural, Building/Structure, Farmstead)

Survey Map No.

1. Property Name (Historic)

2. Property Name (Other)

3. Street E911

Street RTE

Street TOPO

4. Town: Abbot (dropdown menu)

Map Point

My Pr

Quick

Add Ne

View N

Once a Form Type is selected, the user completes the form following the “how to” in sections Data Entry Forms (section 1.4.2 above) and Mapping a Point (section 1.4.3 above). Other MHPC-specific requirements are also enumerated in the “Guidelines” document located at: [http://www.maine.gov/mhpc/architectural\\_survey/survey\\_guidelines.html](http://www.maine.gov/mhpc/architectural_survey/survey_guidelines.html)

### 1.5.3 Add a Sub-Form

Sub-Forms that are created as children of a Farmstead form, operate in the same way they do when not a sub-form. There are two significant differences: the location on the hierarchical “Project Details” view, and the order printed when part of a Project packet. Sub forms occur under and indented from their parent forms, and occur directly after their parent forms in the project-level PDF.

In the example below, the Cont\_Form is a child of HBSS\_Form, which is a child of the Farm\_Form.

**Project Details**

Project ID	012777.00																																					
Survey Name	Turner	<input type="button" value="Edit"/>																																				
Date Recorded	02-07-2008																																					
Surveyor	Marcotte, Tom																																					
Status	In Progress																																					
Survey Forms	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;">Type</th> <th style="width: 15%;">Survey Map No.</th> <th style="width: 15%;">Last Updated</th> <th style="width: 20%;">Surveyor</th> <th style="width: 15%;">Status</th> <th style="width: 10%;"></th> <th style="width: 5%;"></th> </tr> </thead> <tbody> <tr> <td> FARM_FORM 1</td> <td>1</td> <td>02-07-2008</td> <td>Marcotte, Tom</td> <td>In Progress</td> <td><a href="#">print</a></td> <td><input type="checkbox"/></td> </tr> <tr> <td> HBSS_FORM 2</td> <td>2</td> <td>02-07-2008</td> <td>Marcotte, Tom</td> <td>Form Complete</td> <td><a href="#">print</a></td> <td><a href="#">pdf</a></td> </tr> <tr> <td> CONT_FORM 2</td> <td>2</td> <td>02-07-2008</td> <td>Marcotte, Tom</td> <td>Form Complete</td> <td><a href="#">print</a></td> <td><a href="#">pdf</a></td> </tr> <tr> <td> BARN_FORM 3</td> <td>3</td> <td>02-07-2008</td> <td>Marcotte, Tom</td> <td>In Progress</td> <td><a href="#">print</a></td> <td><a href="#">pdf</a></td> </tr> </tbody> </table>			Type	Survey Map No.	Last Updated	Surveyor	Status			FARM_FORM 1	1	02-07-2008	Marcotte, Tom	In Progress	<a href="#">print</a>	<input type="checkbox"/>	HBSS_FORM 2	2	02-07-2008	Marcotte, Tom	Form Complete	<a href="#">print</a>	<a href="#">pdf</a>	CONT_FORM 2	2	02-07-2008	Marcotte, Tom	Form Complete	<a href="#">print</a>	<a href="#">pdf</a>	BARN_FORM 3	3	02-07-2008	Marcotte, Tom	In Progress	<a href="#">print</a>	<a href="#">pdf</a>
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FARM_FORM 1	1	02-07-2008	Marcotte, Tom	In Progress	<a href="#">print</a>	<input type="checkbox"/>																																
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BARN_FORM 3	3	02-07-2008	Marcotte, Tom	In Progress	<a href="#">print</a>	<a href="#">pdf</a>																																
<input type="button" value="new form"/>		<input type="button" value="Delete"/>																																				
<input type="button" value="Submit to DOT"/>																																						

**Continuation Forms**

Continuation forms are designed to convey additional information about a specific form, either in the form of additional photos, sketches or comments, or as additional text related to a specific data field on the parent form.

Unlike other sub-forms, Continuation Forms also adopt the survey information from their parent form. These forms cannot stand alone, and can only be created at the end of an existing form.

Continuation Forms are also unique in that the contents are only printed on the front-side, or first page, of a two-page PDF.

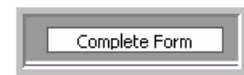
Content of the continuation form should be associated with the data field from the parent form by selecting the field number/name from the picklist.

The screenshot shows a web form titled "Continuation Form Step 2 of 3". It contains the following elements:

- Project ID:** M502
- Data Field #:** A dropdown menu showing "8 - OWNER NAME". A red arrow points to this dropdown.
- Text Data:** A text area containing the text: "The spelling of the family name has changed over time, and references to this property may also be found under the additional spellings of ...".
- Upload a Picture:** A section with an "upload" button, a "Browse..." button, and a radio button selection for "Is the picture a Photo?" with "Yes" selected.
- Navigation:** Buttons for "...Previous", "Save", and "Next..".

### 1.5.4 Status, and the Approval Workflow

When all the content has been entered into a form, the user can click the "Complete Form" button.



All forms in a survey must have a 'Form Complete' status before the Survey can be submitted for review. Forms that have been created and saved, but may not yet be complete have a status 'In Progress'.

The screenshot shows a "Project Details" window for Project ID 012777.00. It includes fields for Survey Name (Turner), Date Recorded (02-07-2008), and Surveyor (Marcotte, Tom). The Status is "In Progress". Below this is a table of survey forms:

Type	Survey Map No.	Last Updated	Surveyor	Status	print pdf	trash
FARM_FORM 1		02-07-2008	Marcotte, Tom	In Progress	print pdf	<input type="checkbox"/>
HBSS_FORM 2		02-07-2008	Marcotte, Tom	Form Complete	print pdf	
CONT_FORM 2		02-07-2008	Marcotte, Tom	Form Complete	print pdf	
BARN_FORM 3		02-07-2008	Marcotte, Tom	In Progress	print pdf	

At the bottom of the table are buttons for "new form", "Delete", and "Submit to DOT". A red arrow points to the "In Progress" status of the first form.

The status of a Survey depends on the status of its Forms. For example, a survey will remain "In Progress" as long as one form is in progress. A survey will be marked 'Rejected' if only one of its Forms is rejected. Similarly, the status of a Form is

dependent on the status of its component Sub-Forms. A user must complete each sub-form before being allowed to complete the parent Form.

**Project Details**

Project ID: 012777.00

Survey Name: Turner

Date Recorded: 02-07-2008

Surveyor: Marcotte, Tom

Status: MDOT Rejected

Survey Forms:

Type	Survey Map No.	Last Updated	Surveyor	Status	
FARM_FORM 1		02-07-2008	Marcotte, Tom	MDOT Rejected	print pdf
<b>View Form</b>					
HBSS_FORM 2		02-07-2008	Marcotte, Tom	Submitted	print pdf
<b>View Form</b>					
CONT_FORM 2		02-07-2008	Marcotte, Tom	Submitted	print pdf
<b>View Form</b>					
BARN_FORM 3		02-07-2008	Marcotte, Tom	Submitted	print pdf

Status of Forms/sub-forms

Once all forms are complete, and the survey is ready, it will either be submitted to DOT or Submitted to MHPC. This button will differ depending on the user's affiliation. It is important to understand that once a survey is submitted, it becomes un-editable by the surveyor. The user is prompted as such.

Are you sure you would like to submit Survey 'M542' for approval?

NOTE: once submitted, the project will no longer be available for editing to surveyor level users

Once submitted, the status of all user survey/projects can be tracked on the My Projects page.

**My Projects**

Project ID	Survey Name	Survey Status	Date Recorded	
12346.00	Test	In Progress	02-06-2008	print pdf
012777.00	Turner	MDOT Rejected	02-07-2008	print pdf

Status of Project

### 1.5.5 Edit a Rejected Survey

If a survey is rejected, there is at least one form within it containing comments on what needs to be fixed. Upon opening a rejected form the user will find red comment boxes. It is the user's responsibility to review the red-highlighted comments and make appropriate corrections.

NOTE: In the example below, the comment is regarding the acreage amount provided in the original form. The user may find the **Measure** tool in the mapping window useful in helping to validate or create acreages for large areas.

The screenshot shows a web-based form titled "Farmstead Form Step 2 of 3". The breadcrumb trail at the top reads "Home > Projects > Survey Details > Edit Form". On the left is a navigation pane with "Dashboard" and "Projects". The main form area contains several fields:

- Project ID: 012777.00
- 45. Primary Use (Present): MIXED USE (dropdown menu)
- 46. Farm Acreage: 250 acres. Below this field is a red-bordered comment box containing the text "please recalculate acreage; 250 seems low". A red arrow points from this comment box to the acreage input field.
- 47. Number of Structures/Sites, incl. house: 11
- 48. Inventory Numbers for Surveyed Buildings: 2-6
- 49. Other Structure/Site Not Recorded on a Survey Form: A. structures for Geese, llama, horses, sheep

Buttons for ". . Previous", "Save", and "Next.." are visible at the top of the form.

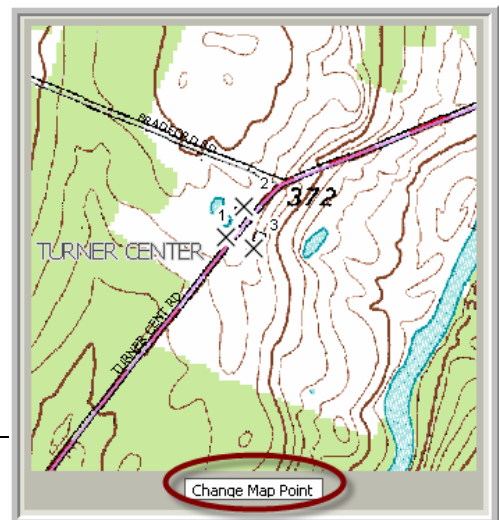
It is important to remember that in order to re-submit an updated form after it has been rejected, the user must re-complete all forms within the project/survey (as described in the [Status](#) section above).

### 1.5.6 Editing an Existing Form

Any form can be reopened and edited in the same way it was created. Remember that once a survey is submitted for review, it becomes un-editable by the surveyor. The user is prompted as such.

#### Change Map Point

The Change Map Point option becomes available for any form already containing a mapped location. Clicking this will initiate the same mapping workflow described above. Once a new location is mapped, a new red X will display on the map. The existing point marker and label will remain until the user goes back to the form, at which point the map should correctly show the new point and label.



It is OK, and is actually intended, for a user to use the Change Map Point button to re-enter the mapping dialog at any time to review the map information for the active Project/Survey.

NOTE: If the user only changes the Survey Map Number, in the form directly, without launching the separate mapping dialog, the user must **Save** the form twice before the small map label is updated. This is because the update is a two-step process, one in the database, the second in the map.

### 1.5.7 Printing Workflow

#### Print a Project/Survey

When a user desires to print a single PDF for the entire Project/Survey, the user should use the **print pdf** link from the “My Projects” Dashboard. All the forms comprising that Project will be generated dynamically based on the content from each form, in the proper order, and containing all the appropriate blank pages.



	<u>Project ID</u>	<u>Survey Name</u>	<u>Survey Status</u>	<u>Date Recorded</u>	
	12346.00	Test	In Progress	02-06-2008	<a href="#">print pdf</a>
	012777.00	Turner	In Progress	02-07-2008	<a href="#">print pdf</a>

CAUTION: Depending on the number of forms in the Project, this process could take a very long time.

Once created, the PDF dialog provides the user additional options for adding page numbers, and printing double-sided (as required in the MHPC Guidelines).

#### Print an Individual Form

A user should use the **print pdf** link from the Project Details page when wanting to print an individual form or sub form. If the Form contains sub forms, it will always be printed to contain all its component sub forms. If only the sub form is desired, the print pdf link from that forms row should be used.

Project Details																											
Project ID	012777.00																										
Survey Name	Turner <input type="button" value="Edit"/>																										
Date Recorded	02-07-2008																										
Surveyor	Marcotte, Tom																										
Status	In Progress																										
Survey Form	<table border="1"> <thead> <tr> <th>Type</th> <th>Survey Map No.</th> <th>Last Updated</th> <th>Surveyor</th> <th>Status</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>FARM_FORM 1</td> <td></td> <td>02-07-2008</td> <td>Marcotte, Tom</td> <td>In Progress</td> <td>print pdf</td> <td><input type="checkbox"/></td> </tr> <tr> <td>HBSS_FORM 2</td> <td></td> <td>02-07-2008</td> <td>Marcotte, Tom</td> <td>Form Complete</td> <td>print pdf</td> <td></td> </tr> </tbody> </table>						Type	Survey Map No.	Last Updated	Surveyor	Status			FARM_FORM 1		02-07-2008	Marcotte, Tom	In Progress	print pdf	<input type="checkbox"/>	HBSS_FORM 2		02-07-2008	Marcotte, Tom	Form Complete	print pdf	
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FARM_FORM 1		02-07-2008	Marcotte, Tom	In Progress	print pdf	<input type="checkbox"/>																					
HBSS_FORM 2		02-07-2008	Marcotte, Tom	Form Complete	print pdf																						

with subforms

subform only

**Blank forms or Maps**

The application provides the user the opportunity to print forms and maps at *any* time during the data entry process. For example, a user may desire to print blank forms or a map to take to the field before the survey has even taken place. In this case, the user should create the Project, and create a new form (of whatever type desired). The form can be saved without additional content and then printed from the Project Details page as described above. Likewise, the user can enter the mapping window via **Plot Map Point** and print a map without actually placing any points.

**Print a Map**

As mentioned before, the **Change Map Point** button from within an individual form is how a user is expected to re-enter the mapping window to print a map. One reason a user will want to do this is to print a map representing all the mapped points in a Project/Survey.

**Change Map Point** will launch the mapping window, zoomed to the extent of the town or all the project points, whichever is greater. Therefore, it doesn't matter from which form in a survey the map is printed, all the points and labels will appear for the entire project/survey.



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