CLIFF 6 User Guide

Version 5.0 - Updated September 17, 2021

AKTIV Software Corporation

Contents

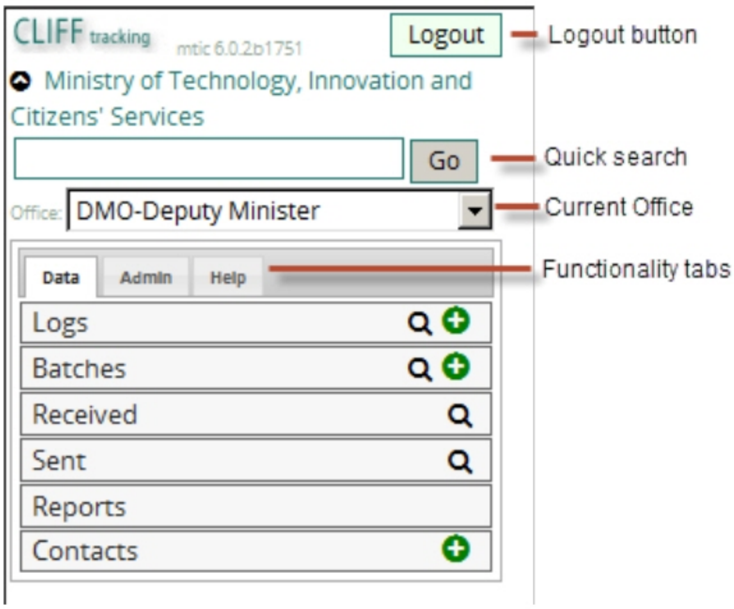
Logging In/Out

- The web address for each CLIFF database is different. Your CLIFF Administrator will need to ensure you have access and will provide you with the web address. Please ensure you save the Login page as a favourite or shortcut.
- The Login process for CLIFF 6 uses SiteMinder to verify your CLIFF Log on credentials with your desktop credentials. This means that you will not need to re-enter your ID and Password when Logging in to CLIFF.
- When you click the **Logout** button, the browser will display the CLIFF Log on screen. Just click the **Log In** button to renter CLIFF – there is no need to enter your user name or password.
- If your last session did not close properly, when you attempt to Log in you may see the following message:

Just click the **Cancel Other Connection** checkbox before you click the **Log In** button again.

Main Screen

The CLIFF menu in the top left corner of the browser window provides access to all the CLIFF functions, sorted into three tabs, and includes the **Logout** button, a **Quick Search** and the current **Office**.



When you are working in CLIFF, you may want to hide the CLIFF menu to give you more screen space for other work in CLIFF.

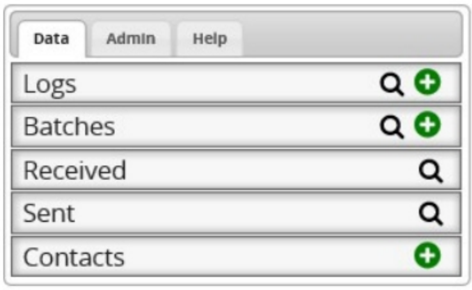
1. Click the **Hide Menu** icon to hide this section of the screen while still providing access to the **Quick Search** and **New Log** functions

2. Click the **Show Menu** icon to redisplay the menu:

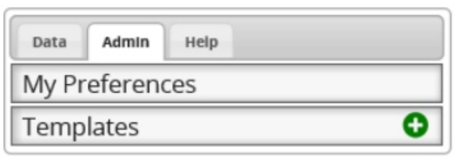
CLIFF Menu

With the exception of the **Office** field and **Quick Search**, all functionality is accessed from the three tabs in the CLIFF menu:

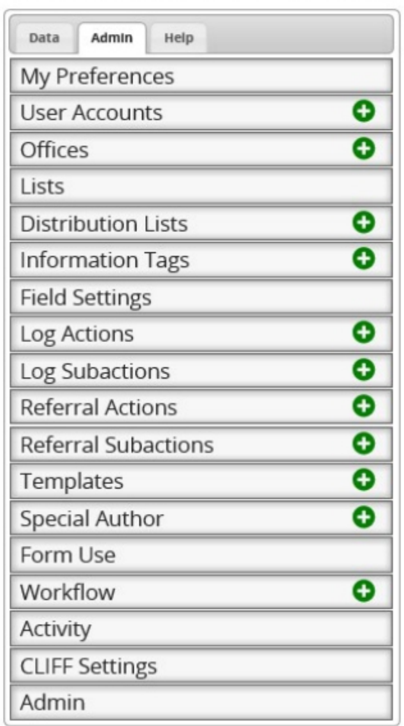
Data tab: for accessing and modifying data:



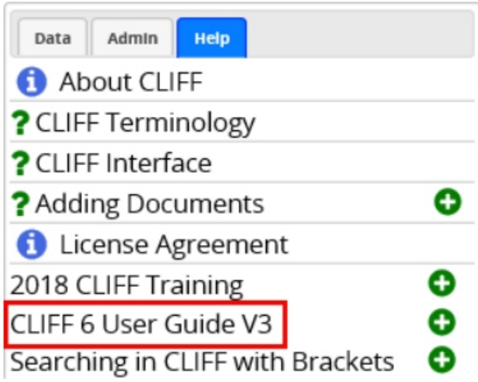
Admin tab: for configuring personal settings and application settings (menu will depend on your access permissions). Most users will only see **My Preferences** and **Templates**:



Administrators will see the full menu:



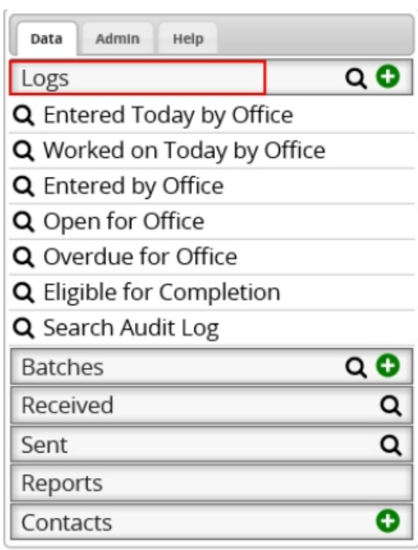
Help tab: provides access to CLIFF Help files, including the full CLIFF 6 User Guide:



You may also find ministry-specific help guides available.

Using CLIFF menus

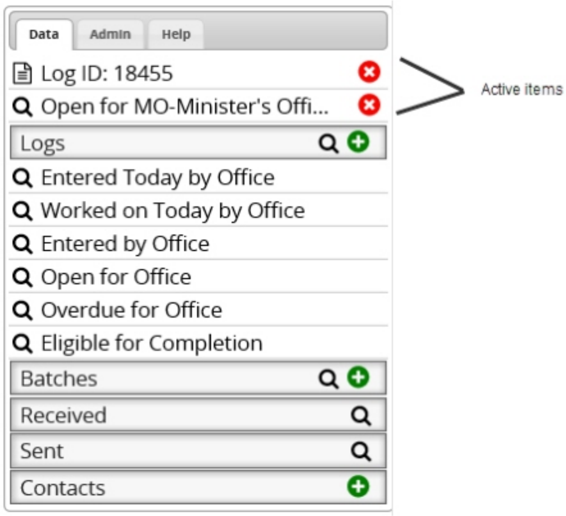
To access a function, click the appropriate menu item to view a sub-menu for that function or to view all current values for that selection. For example, clicking the **Logs** menu, will open a sub-menu that displays the quick searches for Logs:



***Search Audit Log** is only available to CLIFF Administrators

- To add an item, click the **Add** icon to open the appropriate window (i.e. clicking the **Add** icon from the **Logs** menu will display a new Log while clicking the **Add** icon from the **Batches** menu will add a new batch)

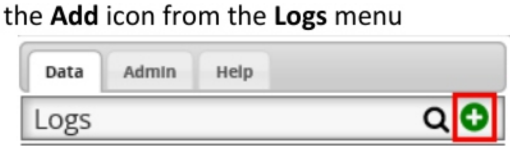
- To search, click the icon on the appropriate menu item (i.e. clicking the **Search** icon from the **Logs** menu will open **Log Search**, while clicking the **Search** icon on the **Batches** menu will open **Batch Search**)
- All active (open) windows or items will be displayed at the top of the applicable CLIFF tab:



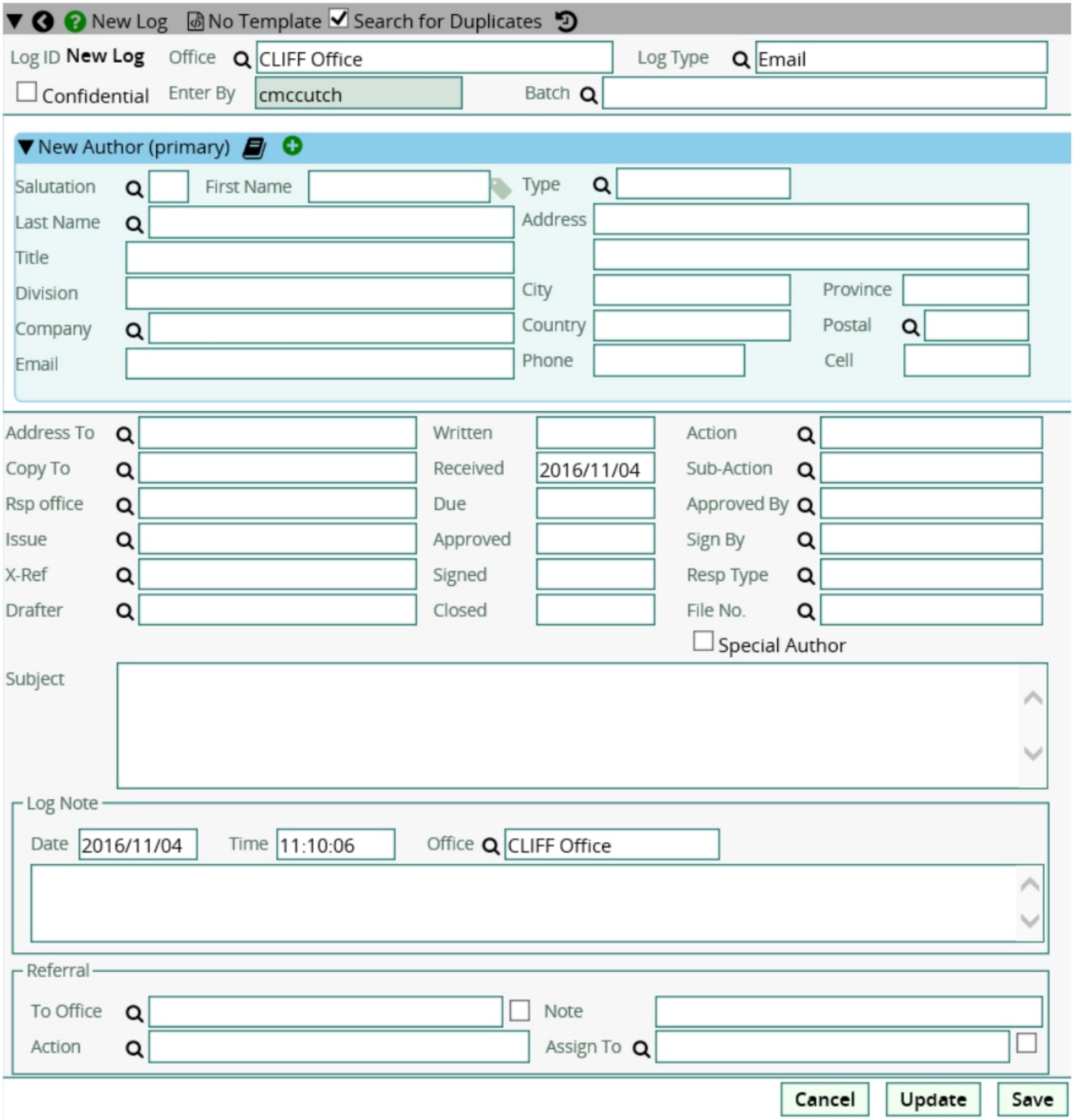
To close a window or selection, click the icon or click the **Cancel** button in the window

Creating Logs

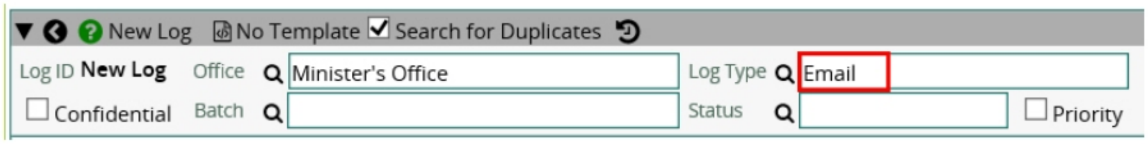
1. To create a new Log, click the **Add** icon from the **Logs** menu



The CLIFF Log screen will have a similar layout to the image below, but may have fields specific to either the **Log Type** or to your organization.

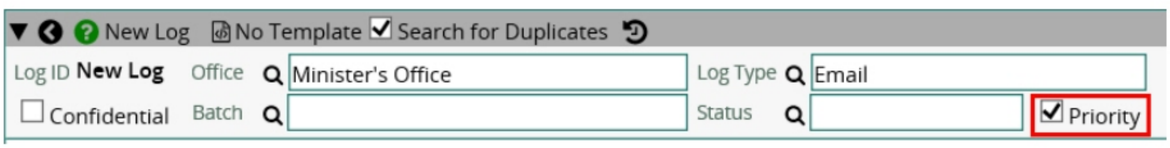

New Log
No Template
Search for Duplicates
Log ID New Log
Office
CLIFF Office
Log Type
Email
Confidential
Enter By
cmccutch
Batch
New Author (primary)
Salutation
First Name
Type
Last Name
Address
Title
Division
City
Province
Company
Country
Postal
Email
Phone
Cell
Address To
Written
Action
Copy To
Received
2016/11/04
Sub-Action
Rsp office
Due
Approved By
Issue
Approved
Sign By
X-Ref
Signed
Resp Type
Drafter
Closed
File No.
Special Author
Subject
Log Note
Date
2016/11/04
Time
11:10:06
Office
CLIFF Office
Referral
To Office
Note
Action
Assign To
Cancel
Update
Save

2. Select the **Log Type** from the list of values to indicate the type of assignment being tracked. This may change the new Log form (new fields may be added or fields may be removed). The last value you used will be displayed by default.



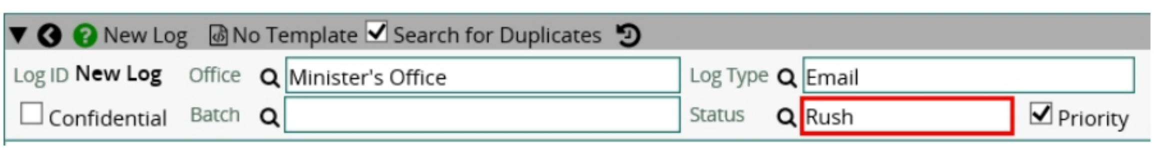
Most organizations have a **Log Type** to identify correspondence initiated by the organization (i.e. there is no incoming letter – only an outgoing letter). This will typically be called something like **Ministry Initiated Correspondence**, **Branch Initiated** or **Program Generated**.

3. If this assignment is high-profile and may require more attention, check the **Priority** checkbox.

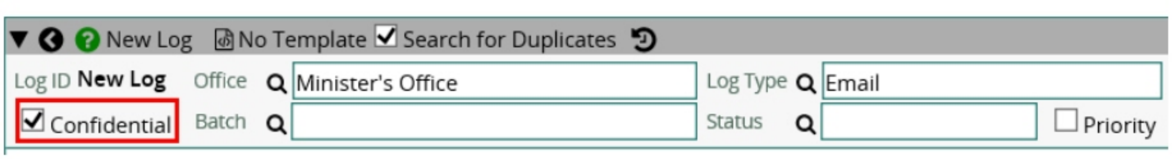


This will mark the Log as a priority in your search results list and can be used for searching.

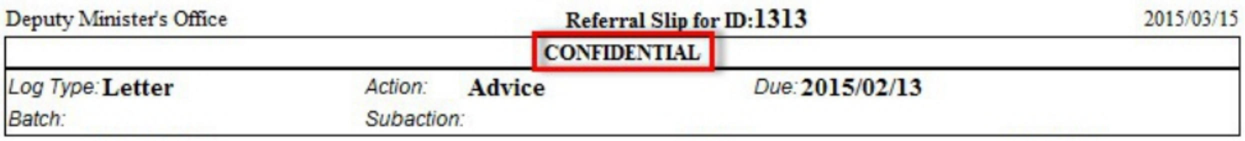
4. Your organization may provide options in the **Status** field to allow you to identify further information on the direction or current status of the Log.



5. If your Log contains information that should not be shared with other CLIFF users in your organization, the **Confidential** checkbox will limit access so that only users who have access to the logging office and any office that receives a Referral can view your Log.



Any Log marked **Confidential** will include a label when the Log is printed or emailed:



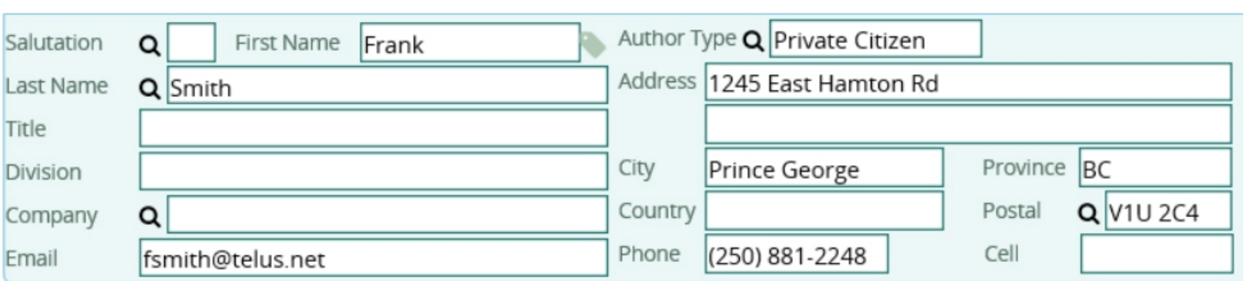
Adding a New Author

The **New Author** block records the primary contact for the assignment.

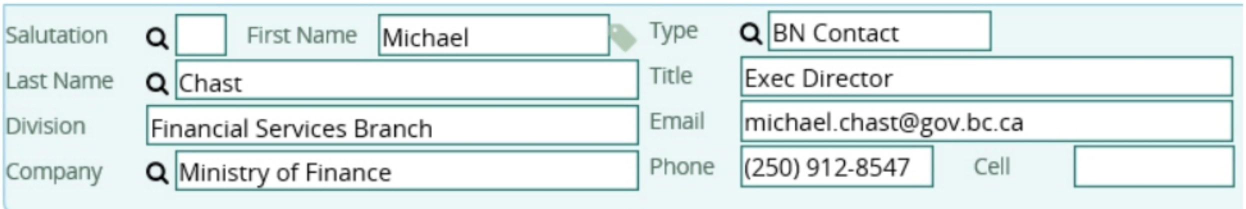
1. Enter the name and address

   Each organization will set policy and procedures for the information used in the **New Author** block, however, generally the following rules apply:

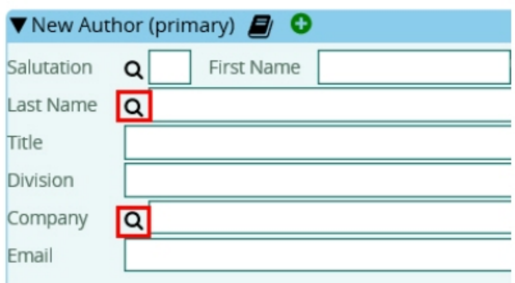
   - For <u>correspondence</u>, the name recorded is the person/organization that the ministry is in contact with (i.e. if the incoming letter is from Frank Smith, her name and contact information is used). If the letter is generated by the ministry (branch initiated/program generated), the name recorded is still the person out in the community (i.e. the ministry is initiating a letter to Frank Smith, Frank's name and contact information is used). This is to ensure the most import contact details are recorded in the Log.



- For briefing material, the name recorded is the person who should be contacted about this assignment. This is usually the person who drafted the material, but may be a Director or ADM responsible.



2. Enter the author **Type** to identify the type of contact for this assignment. The value must be selected from the list of values. If the **Author Type** is for an internal staff member (i.e. **BN Contact**) then the address fields will usually be hidden.
3. When entering a phone number, you only need to enter the numbers. CLIFF will format using the format chosen by your Administrator in CLIFF settings.
4. A list of stored addresses can be viewed by clicking the search icon by **Last Name** (to search by the contact's name) or **Company** (to search by the contact's company name).



- Use the search field at the top of the list to navigate to the correct name. As you enter values into the search field, the list will dynamically update to display only the names with those values:

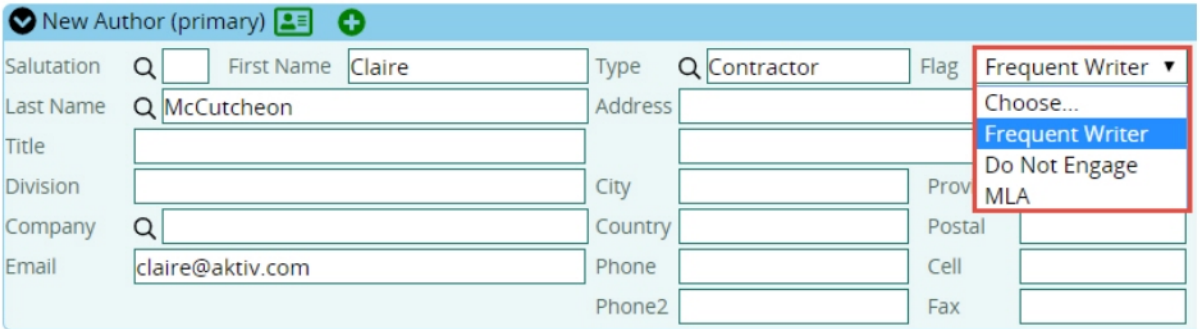
- Selecting a name from the list will auto populate the name and address fields from the stored record
- To add the name and address displayed in the Log to the **Contact** list fill out all the appropriate fields in the address block and click the **Add to Contacts** icon

More information on creating and updating **Contacts** can be found later in this guide.

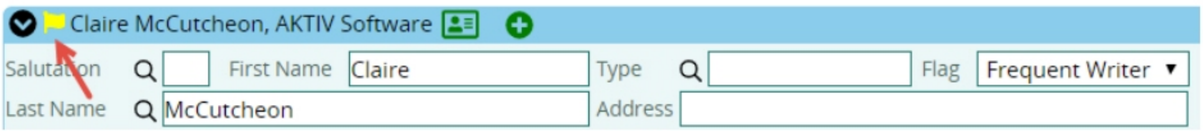
Flagging Authors

Organizations may choose to include coloured flags to further identify special groups of author types.

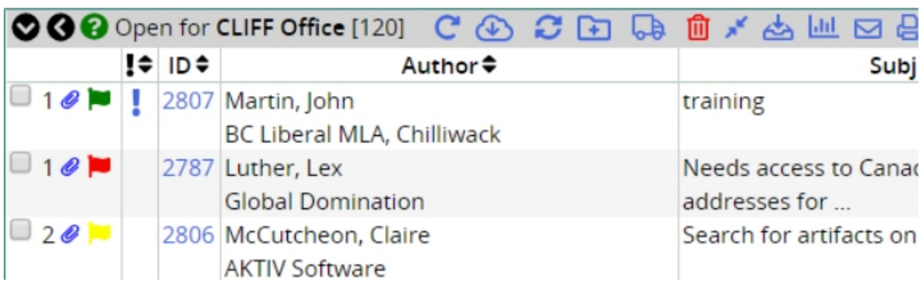
1. From the **Flag** drop-down menu, select the appropriate flag



Once the Log is saved, the Author header will display the colour-coded Flag.

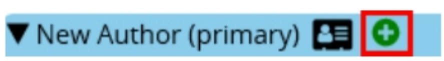


The Log will also show the Flag from the list format. Hovering over the Flag will give a description of the Flag.

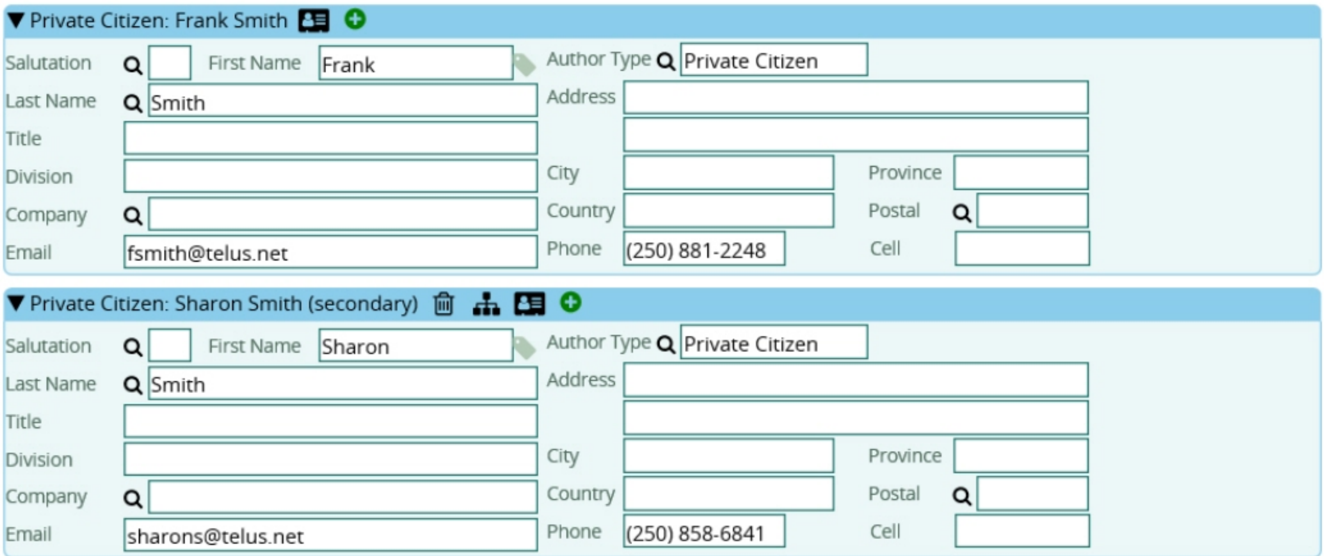


Multiple Authors

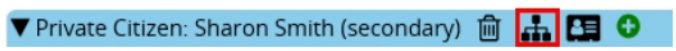
5. If you have more than one contact for a Log, click the **Add** icon to open an additional address block(s)



The additional author block(s) will display in the order in which they were created.

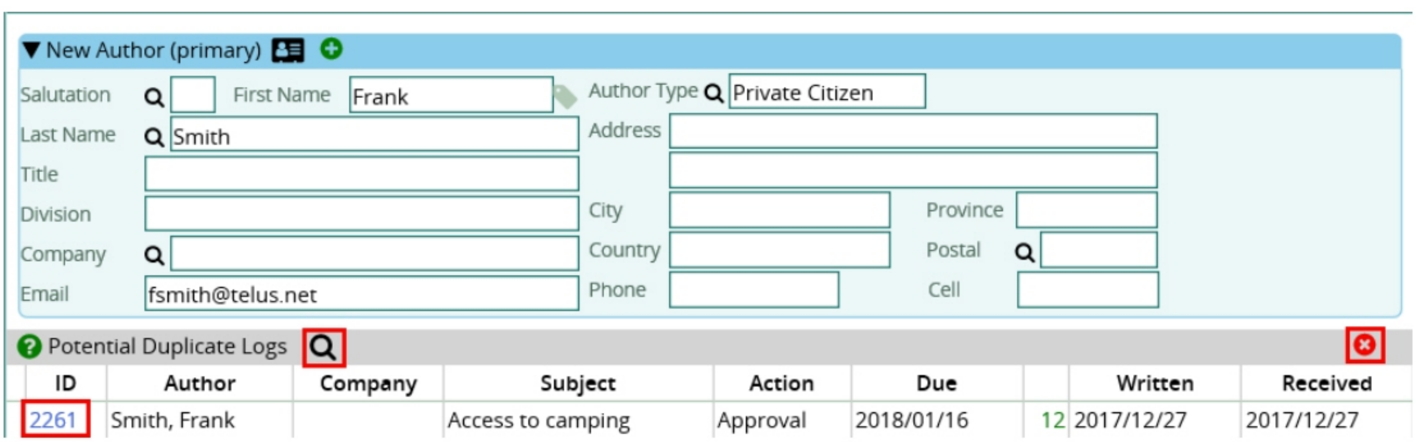


Although all the contact names are searchable, only the top (first) author is displayed in any search results lists. To switch the order so that another contact appears first, click the **Make Primary Author** icon in the address you wish to move to the top.



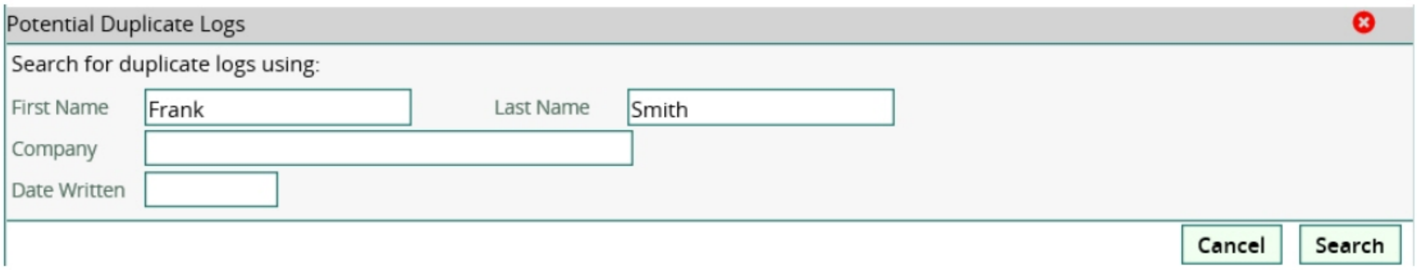
Duplicate Logs

When you enter the author name and address, CLIFF will search the database to determine if this Log already exists. If there is a Log with the same last name received in the last month, CLIFF will display a summary of that Log as a potential duplicate Log.



Click the hyperlinked Log **ID** to view the potential duplicate Log. If you determine that it is the same assignment, you can **Cancel** your newest Log and follow up using the existing Log.

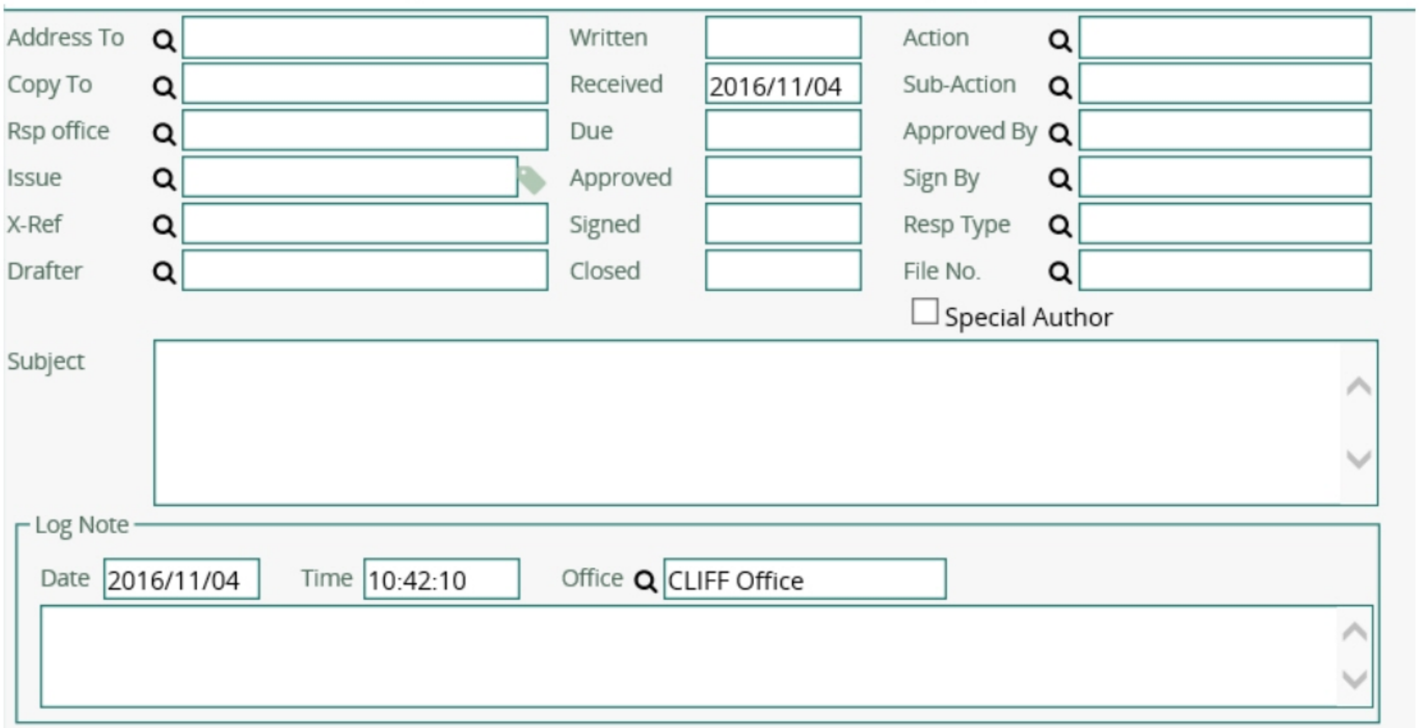
If you would like to adjust the search for potential duplicates, click the **Search** icon. This will let you modify the values used in the search. This may be useful if the writer sometimes uses a different name or you wish to change the date range (CLIFF will search from the value entered in **Date Written** field up to today's date).



Clicking the **Cancel** icon will close the duplicate Logs window.

Adding Log Information

6. Enter all the available assignment details and dates into the remaining Log fields

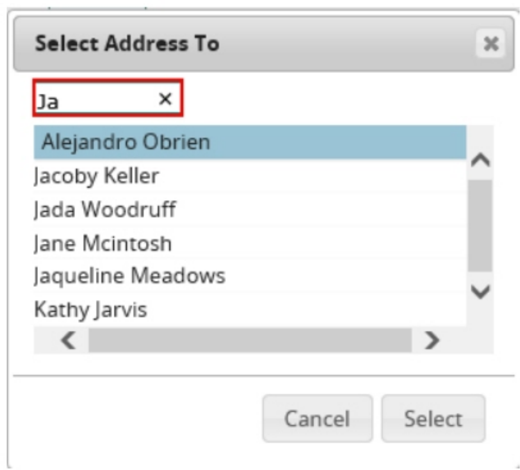


Data Entry Tools

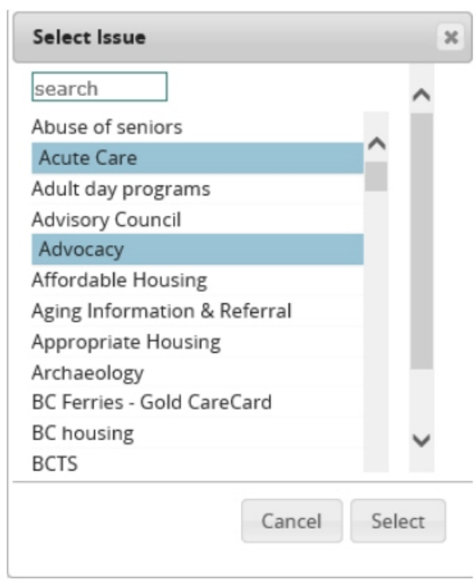
There are a number of features available to streamline your data entry.

- If there is a list of values to choose from, click the **Search** icon next to the field name to view the list

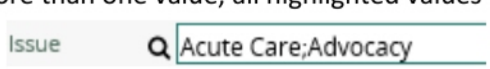
- The list of values for each field will be specific to your organization and will allow you to scroll through the list or search to narrow down your selection. Entering a combination of characters in the search field will show you all values that contain that combination.



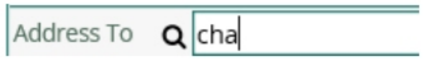
- Some fields will allow you to multi-select (select more than one value from the list). Note that the first value will be highlighted by default and if that selection does not apply, you must click the value to deselect it.



If you are able to highlight more than one value, all highlighted values will be displayed in your field:

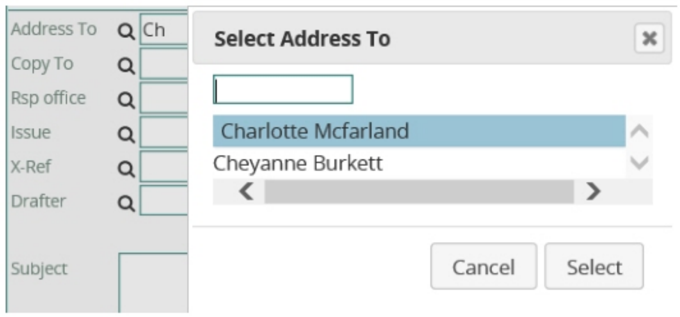


- Once you know the values available for each field, you can enter the first letter(s) directly into the field and then tab or click out of the field.



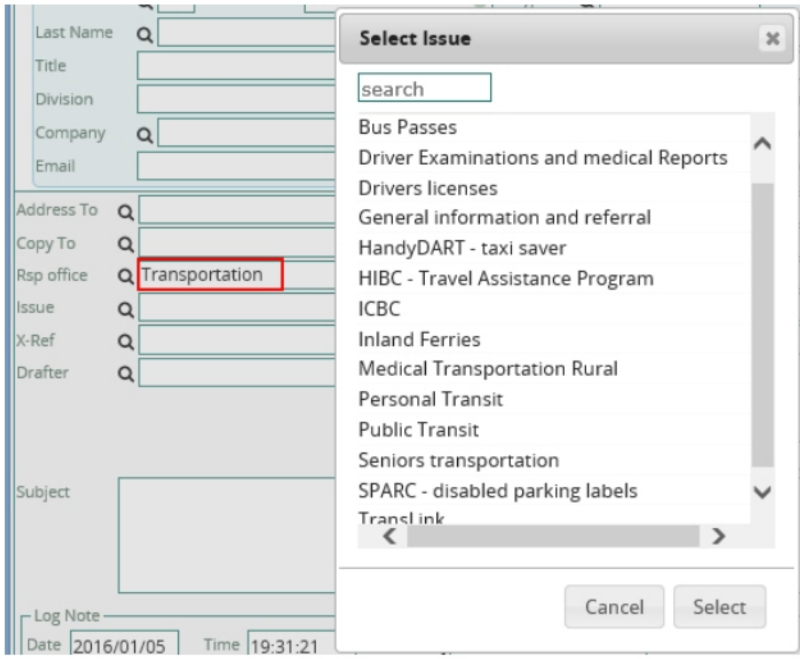
If there is only one value that starts with those letters, the value will be loaded into the field.

If there are multiple matches for that letter or combination of letters, CLIFF will display the list of matches.

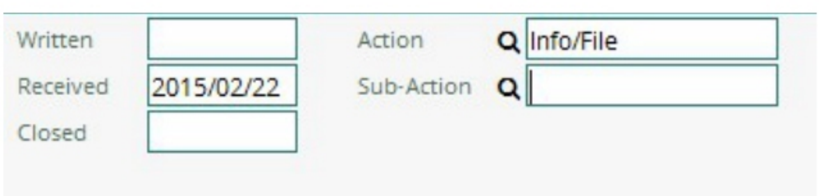


- Some fields may also have a parent/child relationship established. This means that when the value is selected in the first field, the list of options in the second field are limited to those that apply. This is commonly set up between the **Rsp Office** and **Issue** fields (for example, if you select your office on the **Rsp Office** list, the list of values under the **Issue** list will only display the small number of issues related to your branch). If you select the "child" value first, CLIFF will automatically populate the "parent" child.

  For example, selecting a **Rsp Office** of **Transportation** limits the **Issues** list to issues related to transportation.



- Date fields can be populated using the **-/+** shortcut (i.e. entering -2 in a date field will enter a date of two days ago once you exit the field). Additionally, users can enter 2 digits for year, month and day (with no punctuation). For example, typing 161101 will convert to 2016/11/01.
- Selecting a Log **Action** may update the Log form to remove unnecessary fields. For example, when an **Action** of **FYI** is selected, the lower right region may update to remove the fields for **Due**, **Approved**, **Signed**, **Approved By**, **Sign by** and **Resp Type**:



Common Data Entry Fields

Most organizations use some, or all, of the fields for collecting data.

Assignment Details

- **Address To** – identifies who the incoming mail was addressed to
- **Copy To** – who else received copies of the incoming mail
- **Rsp Office**/**Rsp Div** –which office and/or division is taking primary responsibility for the completion of the assignment (your organization may have one or both of these fields)
- **Issue** – key issue(s) of the assignment
- **X Ref** –other CLIFF ID numbers that should be cross-referenced with this new assignment
- **Drafter** – the name of the staff person who is preparing most of the content to complete this assignment
- **W/Letter** or **W/BN** – if the letter has a corresponding briefing note these are typically tracked in two separate CLIFF Logs but cross-referenced to the other half of the assignment in this field

Dates

Written – when the incoming letter/email was written (only used for incoming correspondence)

Received – when the incoming was received or, for internally generated assignments, when the assignment was first initiated

Due – when the entire assignment is due for completion. This field is automatically populated when an Action is selected that carries a due date (i.e. not FYI assignments) but can be modified.

Approved – when the assignment received final approval

Signed – when the final document was signed/signed off

Closed – when no more work is required on the assignment

Activity

Action – the primary action required for this assignment. Your organization may have set up the list to relate to the Log **Type**.

Sub-Action/Sig Level - allows you to provide an additional layer of detail to the **Action**. Not all actions will have sub-actions available. Note that many organizations have re-labelled this field to **Sig Level** to record the required signature level for this assignment.

Approved By – the name of person providing the final level of approval

Sign By – the name of the person signing the completed letter/document

Resp Type – for correspondence only, the format of the response (i.e. email, letter or phone call)

File No. – the ARCS or ORCS number for this assignment

Special Author/Frequent Writer – allows you to identify authors of incoming correspondence that have had frequent interaction with the organization in the past

Note – organizations may be additional fields in addition to those listed above. Contact your CLIFF Administrator for more information.

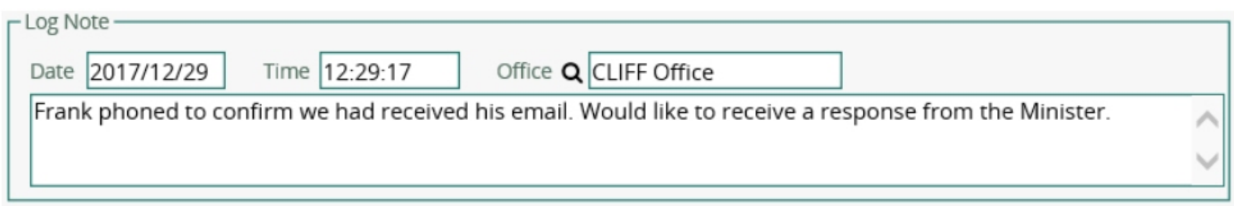
Entering the Subject

The **Subject** line is a mandatory part of the CLIFF Log as it provides the description of the assignment (i.e. what the incoming letter was concerning, the title of the briefing note, the terms of the contract, etc.). As the **Subject** line is keyword searchable, it is important to use the wording consistent with your organization's messaging (i.e. "child care" rather than "daycare").

As the **Subject** line is included in search results and most reports, it is important to provide enough detail for anyone unfamiliar with the assignment to get a true sense of the content. For example, rather than entering "new hospital in Fort St. John" a better subject line would be "Concern regarding the location of the new hospital in Fort St. John as access is via a dangerous route."

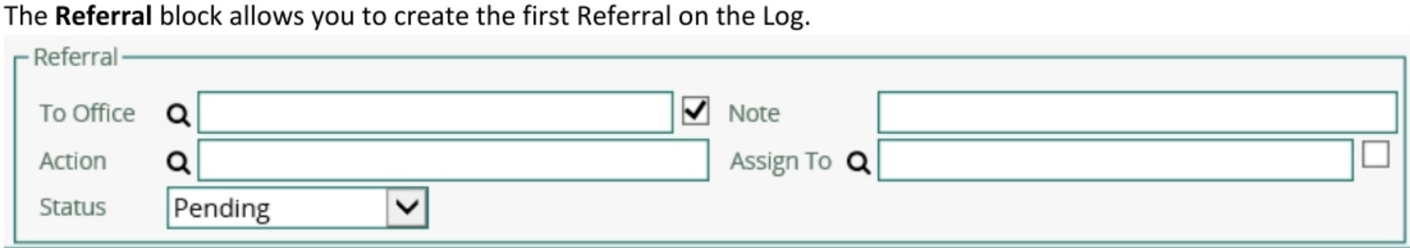
Adding Log Notes

Log Notes allow you to add additional details regarding the assignment or instructions for its completion. You can add your first **Log Note** before the Log is saved and/or continue to add Notes throughout the lifecycle of the assignment. The **Date**, **Time** and **Office** can be overridden, although CLIFF will date stamp the note with today's date and time when saved.



Adding the First Referral

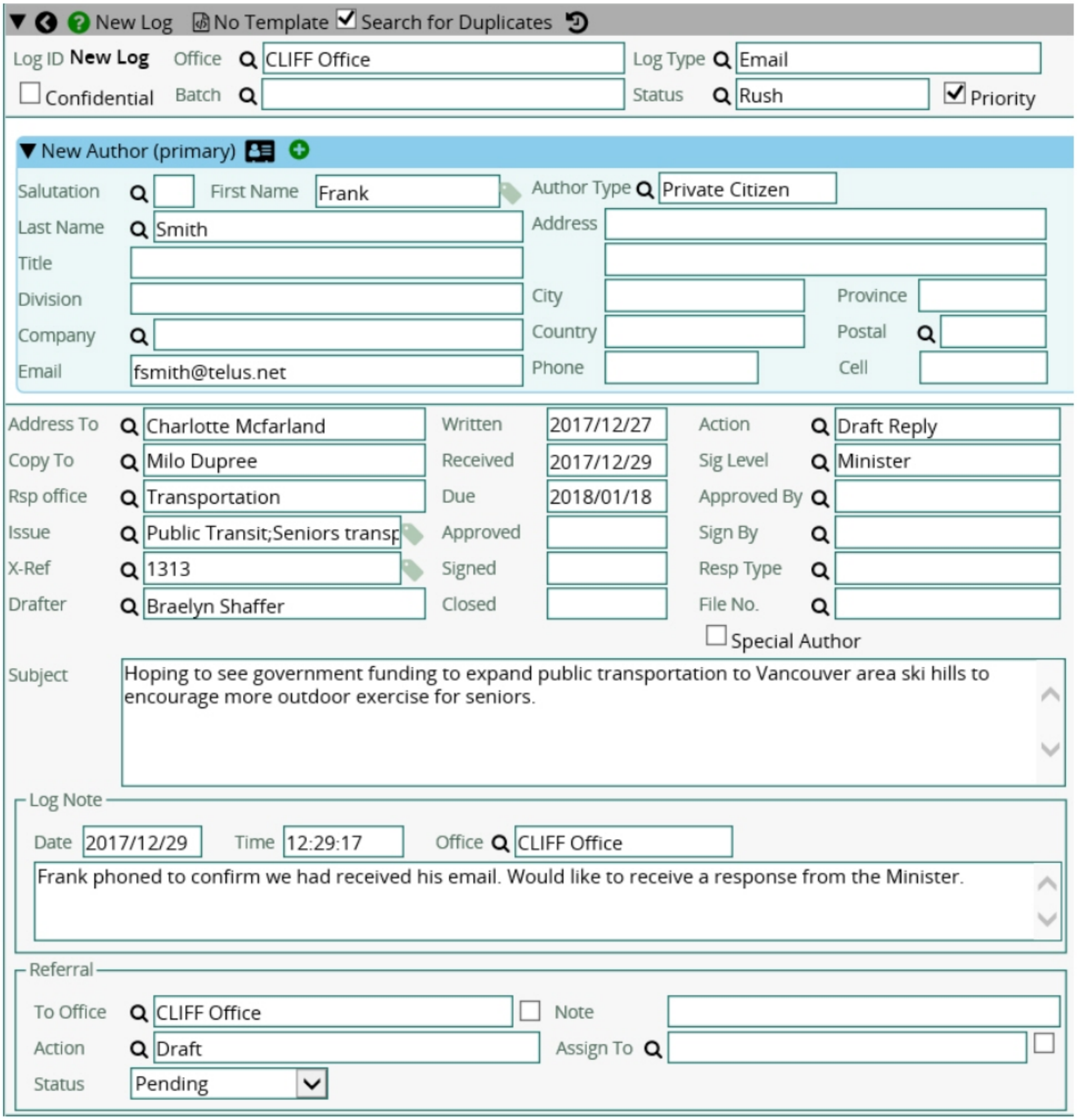
The **Referral** block allows you to create the first Referral on the Log.



5. From the **To Office** list of values, select the first office to work on the assignment (usually this is the same office that created the Log, to track the work done by that first office)
6. From the **Action** list of values, select the primary action required by this office
7. If you know the person in the office who will be currently working on the assignment, enter their name in the **Assign To** field. If they are a CLIFF user, their name will be on the list of values.
8. If the first office has already completed their work, the **Status** can be changed to **Completed**. Note that the default setting of **Pending** will automatically update to **Accepted** if you are referring the assignment to your own office.

The **Note** field is a place to record information about the assignment that will not be printed or emailed. This is generally used by the CLIFF user to remind themselves of administrative activities related to the assignment that may not be relevant to writers or executive members.

Below is an example of a Log tracking an incoming email to the Minister:



9. Once you have completed the data entry, you will have three options.

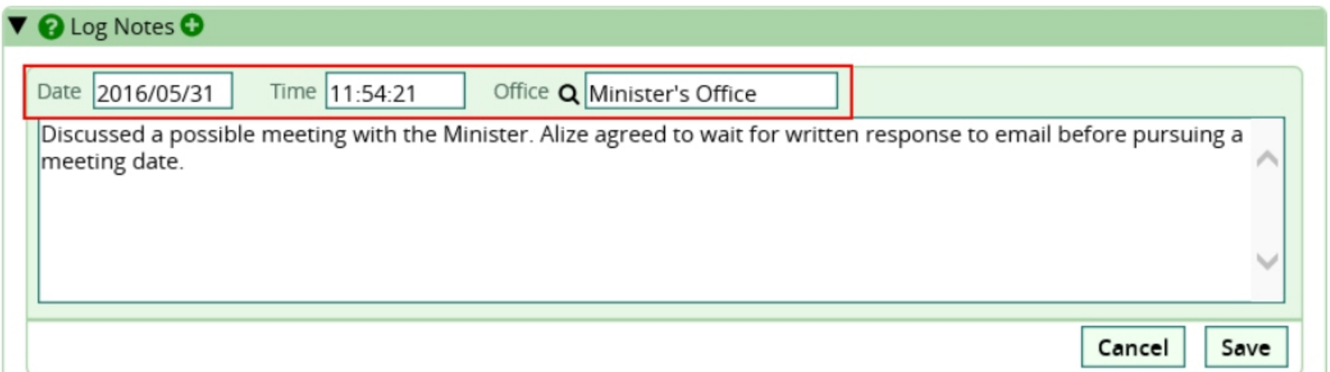
- **Cancel** –exits the screen and will not save changes
- **Update** –saves your changes and keeps your Log open on the screen (and enables **Referrals**, **Attachments** and **Notes)**
- **Save** – saves the changes and exits the screen

Adding Log Notes

Once the Log is saved, additional Log notes can be added.

10. Click the **Add** icon to open a new notes text field

All notes will be stamped with the update date and user, but the **Date**, **Time** and **Office** can be modified if necessary.



Once the note is saved, the **Note** will be visible on the main Log screen with the most recent note at the top of the list.

The notes pane can be opened or collapsed with the close icon  .

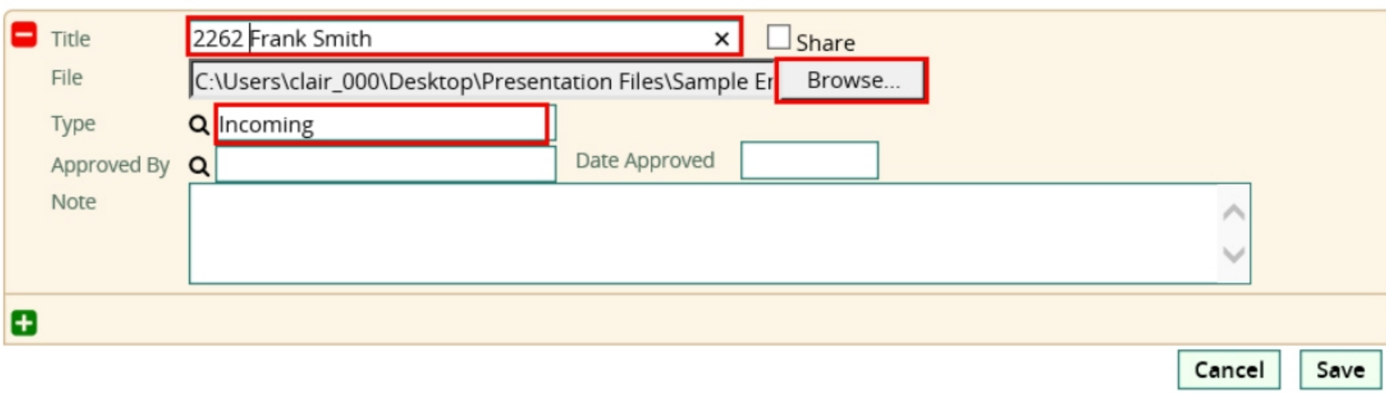
11. Existing **Notes** can be edited by clicking the date in the existing note. If you edit a Log note, the date stamp will update with the details of the last user, date and time.

Adding Attachments

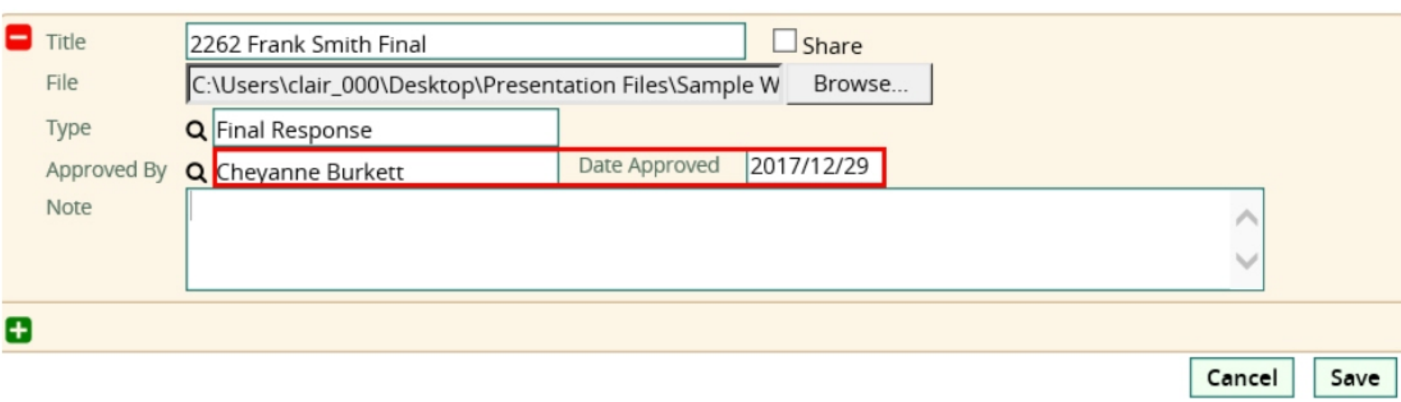
Once the Log is saved, attachments can be added. Most attachment types can be keyword searched as long as they are in a format that allows for keyword indexing (email, Word, Excel, etc. can all be searched if they are uploaded as these file types). If you would like your scanned documents to be searchable, ensure that your scanner settings are set to OCR (Optical Character Recognition).

12. Click the **Add** icon to open an attachment window

13. Click **Browse** to select the attachment (emails must be dragged or copied from Outlook to the desktop or LAN before they can be imported into CLIFF)
14. Select a **Type** to indicate the nature of the attachment (i.e. **Incoming**, **Draft**, **Final Response**, etc.)
15. You can add a **Note** regarding the attachment
16. You can add a **Title** or let CLIFF decipher the title from the attachment

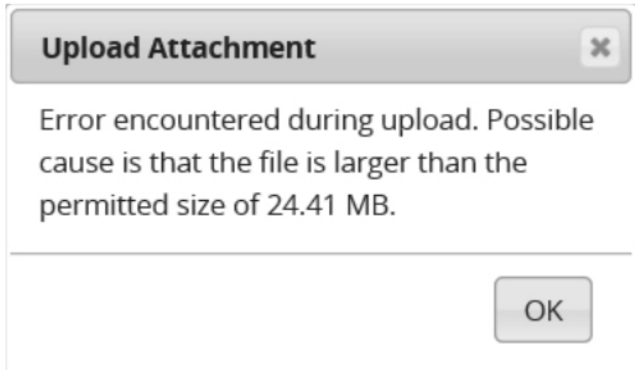


The **Approved** and **Date Approved** fields can be used when the attachment is ministry-initiated.



17. Click **Save** (or **Cancel** to not save)

If you attempt to upload an attachment that exceeds the size restriction, CLIFF will display an error message (note that the size limit for government CLIFF databases is 20 MB):



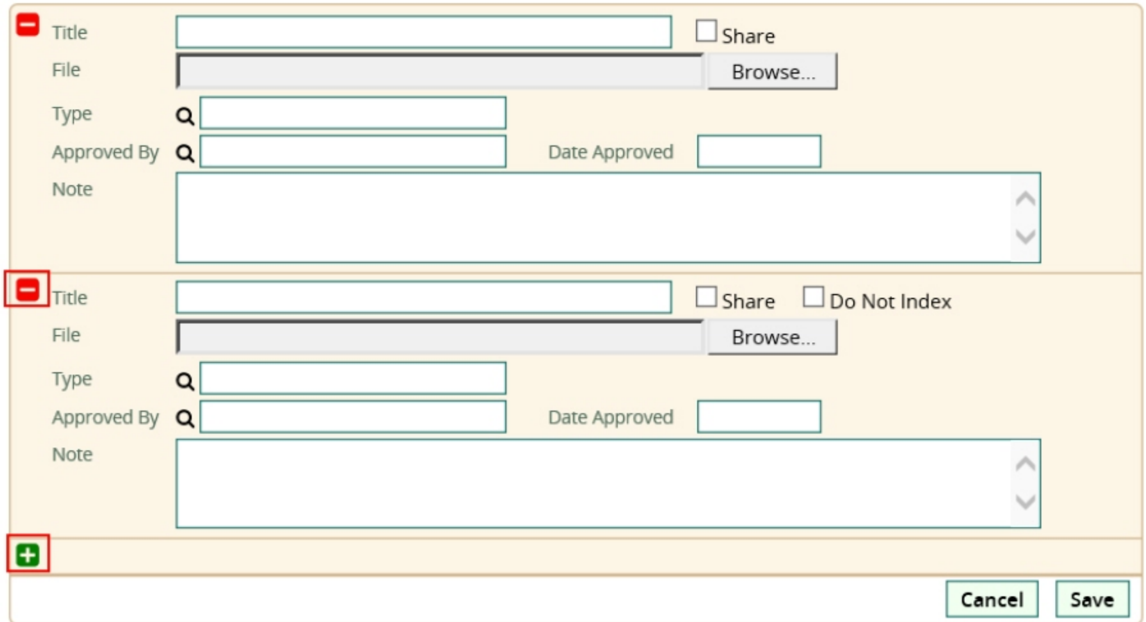
Once the attachment is saved, it will be visible on the main Log screen.

Log Attachments

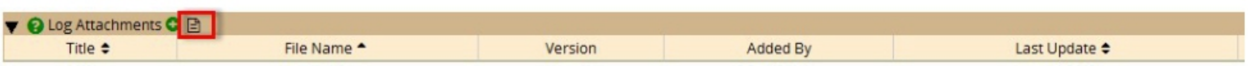
	Title	Version	Size	Type	Approved	Approved By	Last Update By	Last Update	
	2262 Frank Smith Final	1	17 KB	Final Response	2017/12/29	Cheyanne Burkett	cmccutch	2017/12/30	
	2262 Frank Smith	1	74.5 KB	Incoming			cmccutch	2017/12/30	

The attachment pane can be opened or collapsed with the close icon .

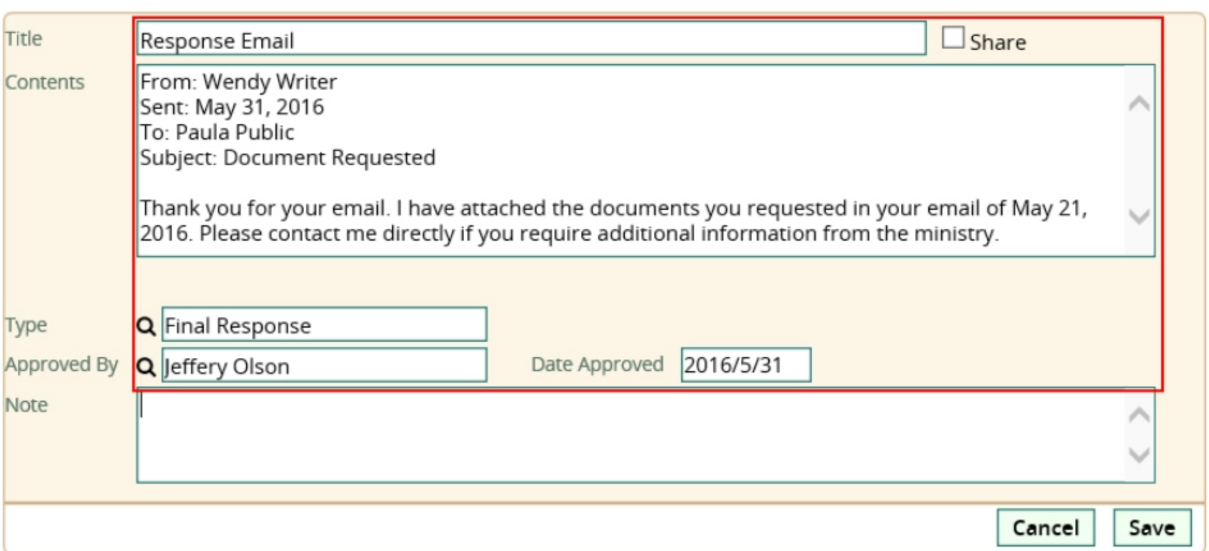
To add multiple attachments at a time, click the **Add** icon within the **Attachments** pane to open additional attachment blocks. Once all the attachments have been identified, click the **Save** button to upload them all. To remove an attachment block that is not required, click the **Remove** icon .



To add a text attachment, click the **New Text Attachment** icon on the **Attachment** pane to open the text attachment block.



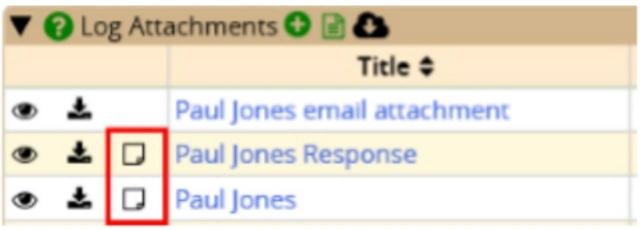
Enter a **Title**, paste or type the text into the **Contents** field, update any additional required fields and click the **Save** button.



Viewing and Updating Attachments

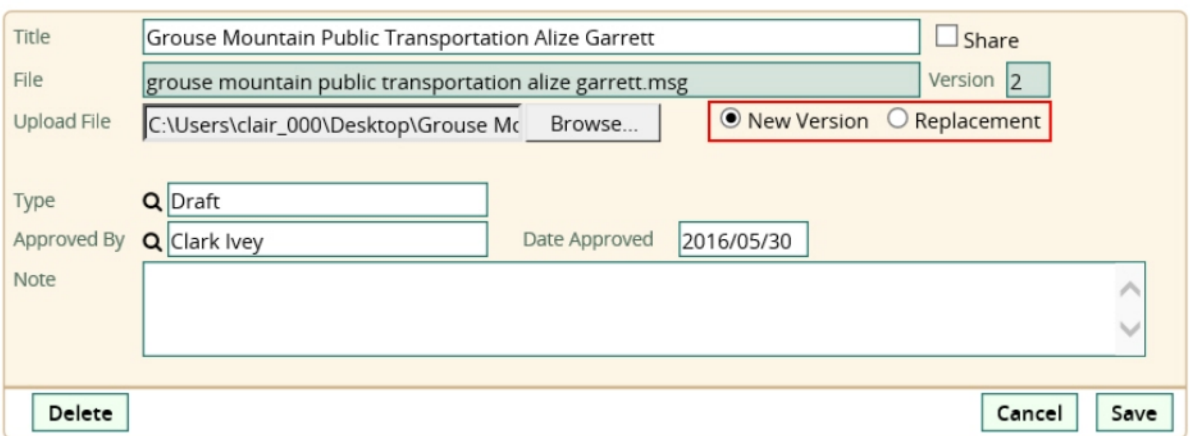
Once an attachment is in CLIFF, it can be viewed, downloaded or replaced. Only certain users will be allowed to delete attachments. If you have been granted permission, you will see the trash can at the end of each Referral line.

- To view the attachment, click the **View** icon or to download a copy of the attachment click the **Download** icon and follow the instructions in your browser window
- If text has been added to the **Note** field in the **Attachment** window, CLIFF will display an icon next to the attachment **Title**:

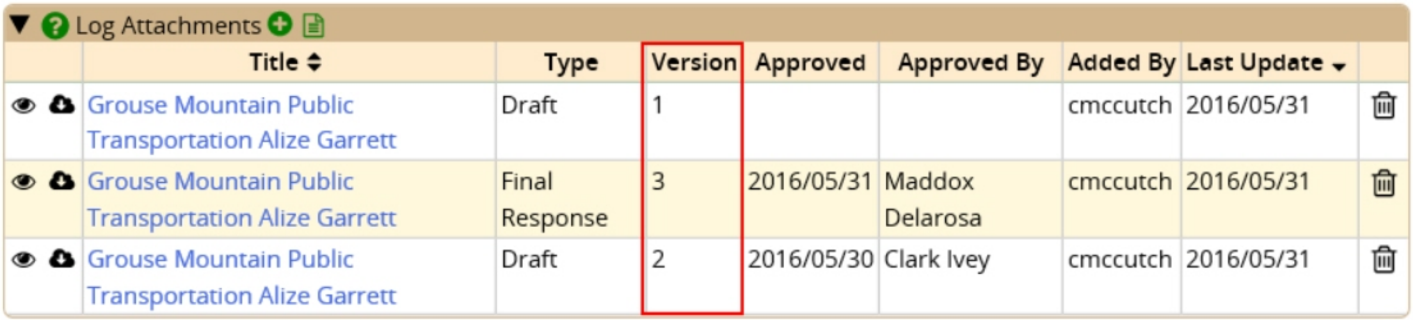


To replace an attachment, click the **Title** of the attachment to open the attachment window and then click **Browse** to select the new version of the document.

a. Once the new version has been selected, you can select the option of **New Version** (which will keep both the original copy and the new copy) or **Replacement** (which will only keep the newest version)



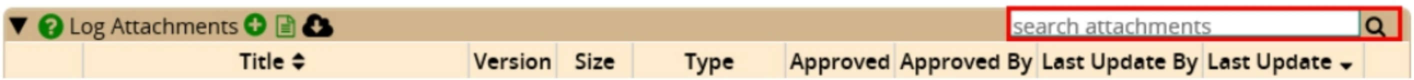
b. Click **Save** to update the attachment
c. If you select **New Version**, both versions will be displayed in the list with a **Version** number



	Title	Type	Version	Approved	Approved By	Added By	Last Update	
	Grouse Mountain Public Transportation Alize Garrett	Draft	1			cmccutch	2016/05/31	
	Grouse Mountain Public Transportation Alize Garrett	Final Response	3	2016/05/31	Maddox Delarosa	cmccutch	2016/05/31	
	Grouse Mountain Public Transportation Alize Garrett	Draft	2	2016/05/30	Clark Ivey	cmccutch	2016/05/31	

Keyword Searching Attachments

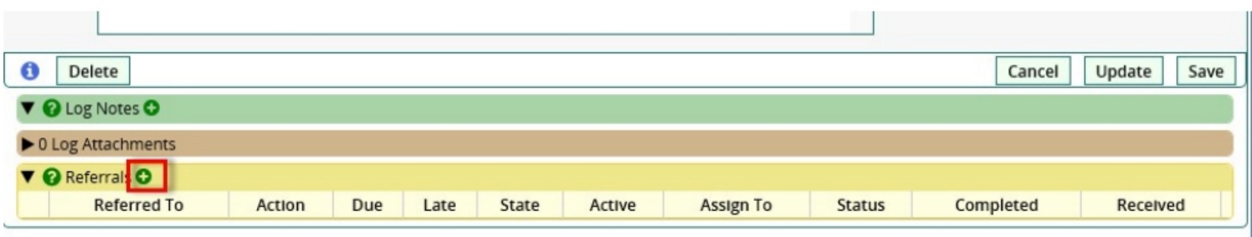
If keyword searching is available, the Search Attachments field will be visible in the Log Attachments header. Enter your keyword(s) and click the search icon.



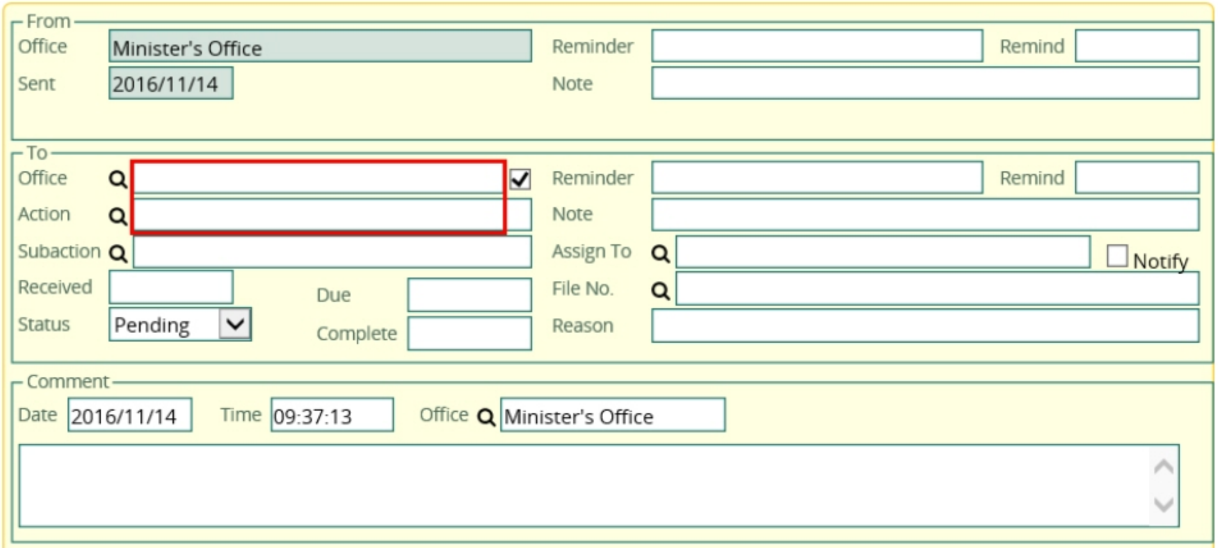
Adding Additional Referrals

You may need to add additional Referrals to your Log to track the assignment to another office.

18. Click the **Add** icon at the front of your existing Referral to open a new Referral window. If you do not have any Referrals on screen yet, the **Add** button will be in the Referral header:



In the new Referral window the Referral information is sorted into **From** and **To** areas. The **To Office** and **Action** are mandatory fields.



19. From the list of values, select the **To Office** to indicate the office receiving the Referral (note: procedurally, most organizations create the first Referral to the Logging office to track the work done by the first office). If you send the Referral to your own office, the **Status** will automatically update to **Accepted.**

    If your organization has automatic notifications enabled, you will see the **Notify** checkbox at the end of the field. It may checked or unchecked by default, depending on your organization's preferences.

    If it is checked the contact(s) for the **To Office** will received an email from CLIFF notifying them of the assignment. CLIFF will not send a notification if the Referral is to your own office.
    You can deselect the checkbox to prevent the notification from being sent.

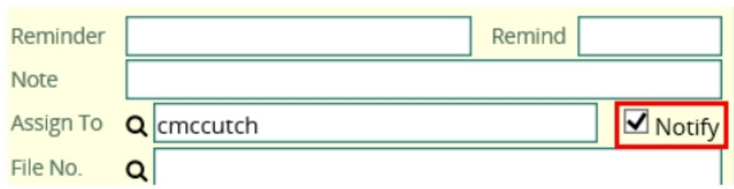
20. Select the **Action** and, if required, the **Sub-action** to indicate what this office is required to do with the assignment (i.e. draft, approve, sign, file, etc.)

21. Each area has a **Reminder** and **Remind** (date) field – entering a note here with a date will email the contact for that office (i.e. if you enter the **Reminder** in the **From** section, the reminder will go to the contacts for the sending office and if you enter the **Reminder** in the **To** section, the reminder will go to the contacts for the receiving office).

22. The **Note** field, allows each office to add a comment that is only visible in CLIFF (will not be included if the Log is emailed or printed)

23. The **Assign** field allows users to track the name of the staff person currently working on the assignment. If the staff person has a CLIFF user account and access to the **To Office** then they will be on the list of values for the field. You can also type names in the field.

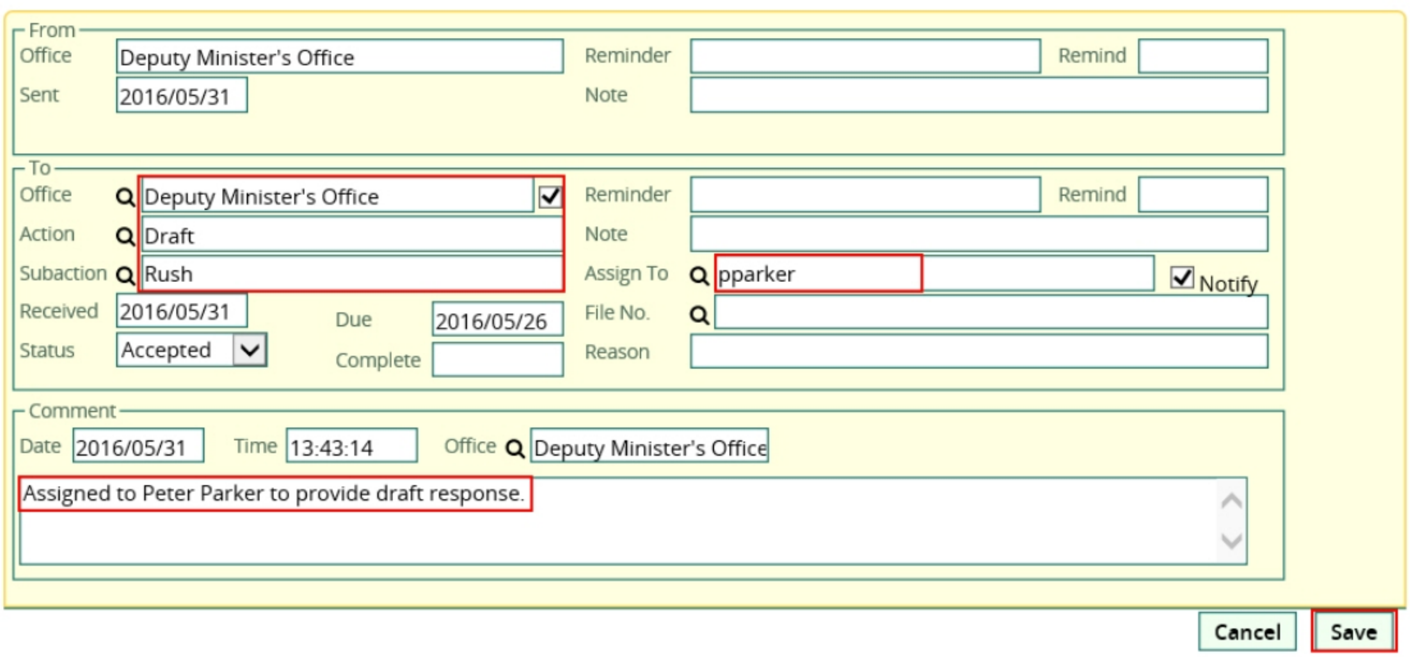
    If your organization has automatic notifications enabled, you will see the **Notify** checkbox at the end of the field.



    If you select a name from the list, the checkbox will be automatically marked and the person will receive an email from CLIFF notifying them of the assignment. If you manually type in a name they will not receive the automatic notification (as CLIFF will not have email contact information for them). If you do select a name from the list but do not want a notification to be sent, deselect the **Notify** checkbox.

24. To add additional details regarding the assignment (such as specific information on the drafting and approval routing within the office) enter the details in the **Comments** block. Additional Referral comments are can be added and will be listed sequentially with an automatic date stamp.

25. Click **Save** (or **Cancel** to not save)



26. Once the Referral is saved, it will be visible on the main Log screen

27. Once the Referral is saved, you can add sub-Referrals to other offices, using the **Add** icon at the front of the Referral:

▼ Referrals

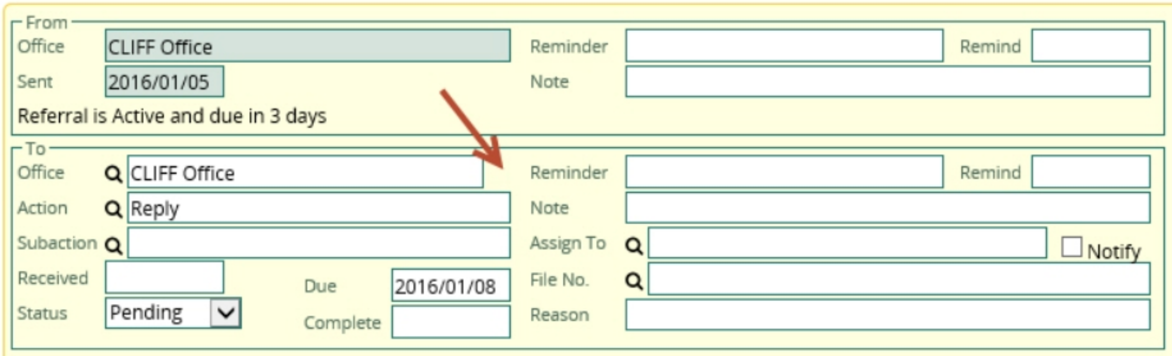
		Referred To	Action	Due	Late	State	Active	Assign To	Status	Completed	Received	
		Deputy Minister's Office	Draft	2016/06/10	-8	Active	<1 day	pparker	Accepted		2016/05/31	

28. The Referral list includes columns for:
   - **Referred To** – the **To Office** from the Referral
   - **Action –** the action for this Referral
   - **Due Date** - colour coded: green = outstanding, red = overdue
   - **Late** – the number of days the Referral is late (red) or until the due date (green with a minus sign)
   - **State** –
     - **Active** = office is actively working on the assignment
     - **Pending** = office has sub-referred the assignment and is waiting for another office to finish their Referrals before working on the assignment again
     - **Blank** = the Referral has no due date and the office is only viewing the assignment for information purposes or the Referral has been completed
   - **Active** – the number of days the Referral **State** has been **Active** in this office. When the Referral is sub-referred to another office or completed, the count is suspended or stopped. For example, the **<1** in the above Referral indicates that the Referral has been active in this office for less than 24 hours in the working week.
   - **Assign To** – the name or IDIR ID entered in the field in the Referral
   - **Completed** – if the Referral **Status** has been changed to **Completed**, the date of the completion will display
   - **Received** – the date the Referral **Status** was updated to **Accepted**
   - **Trash Can –** will display if the user has access to delete Referrals (usually reserved for CLIFF Administrators)

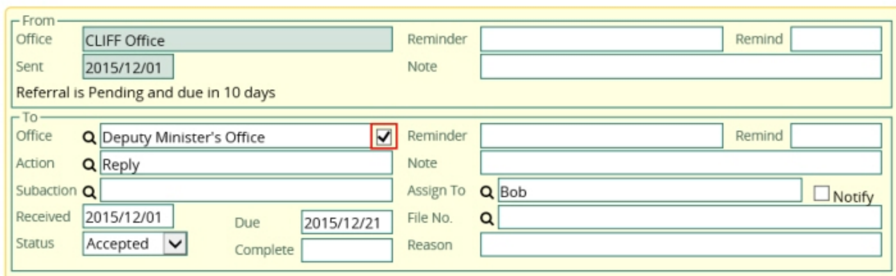
Auto Notifications

Administrators can set the auto-notification flag to three different settings in **CLIFF Settings** on the **Admin** tab. If offices have a contact email identified and the auto-notification checkbox in the Referral is selected, an email notification is sent automatically to the receiving office when the Referral is saved.

- When the notification is set to **Off**, you will not see a checkbox by the **To Office** in the Referral window



- When the notification is set to **Default**, you will see a checkbox and it will be *checked* by default
- When the notification is set to **Optional**, you will see a checkbox and it will be *unchecked* by default

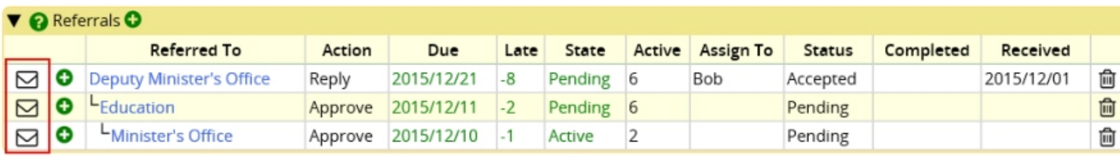


You can select or deselect the checkbox on an ad hoc basis to select which Referrals include the auto notification. If a notification is sent, you will receive a confirmation pop-up message.

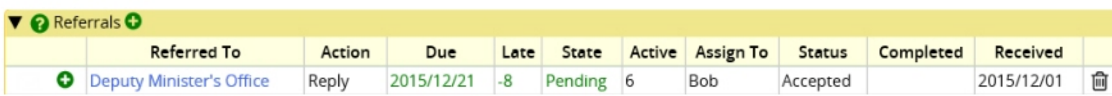
In addition, a Referral comment is added to record that the notification was sent.

Administrators can block notifications going to certain offices. If an office is blocked and you attempt to send an auto notification, you will receive a pop-up warning message

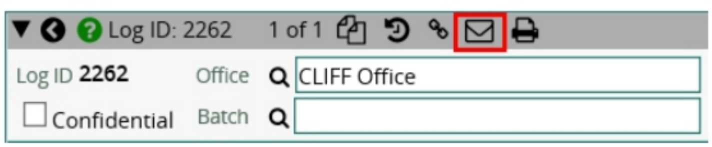
If automatic notifications are not available, you can email from the CLIFF Referral line as long as there is an email contact identified for that office.



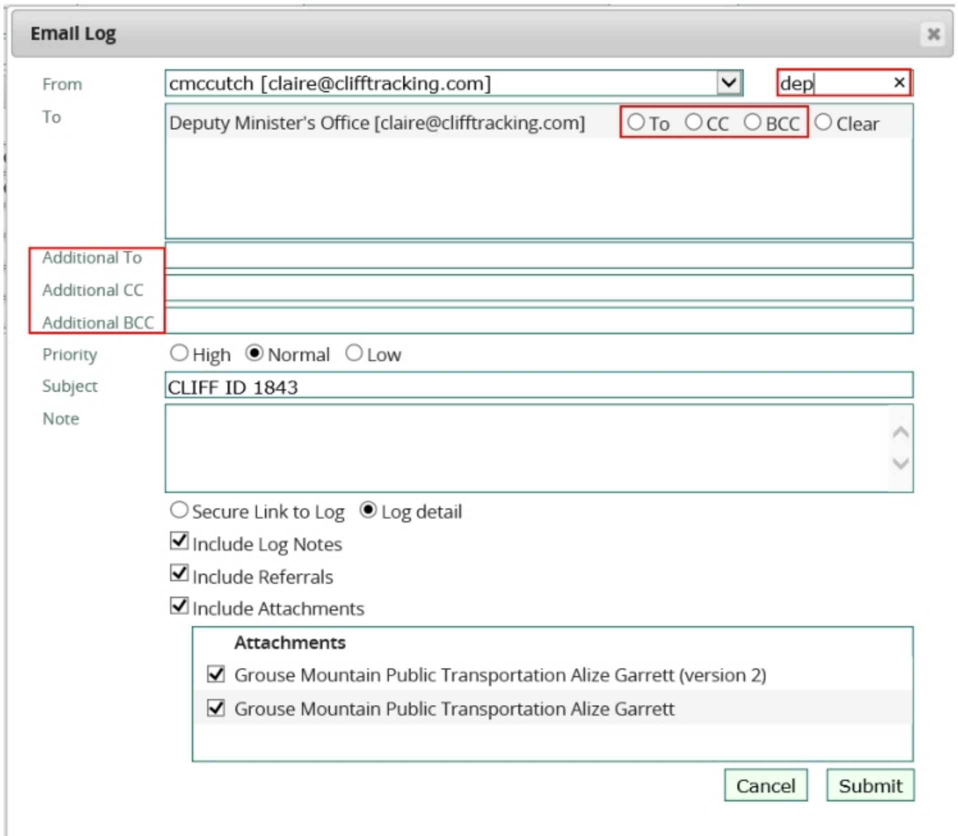
If there is no email contact identified for that office, the email icon will not display.



You will always have the option to email the Log from the top tool bar.



CLIFF will not automatically identify an email contact, but you can either select an addressee by office or user name from the list (use the **Search** box in the top right corner to find the name quickly) or manually enter an email address in the **Additional** address lines.

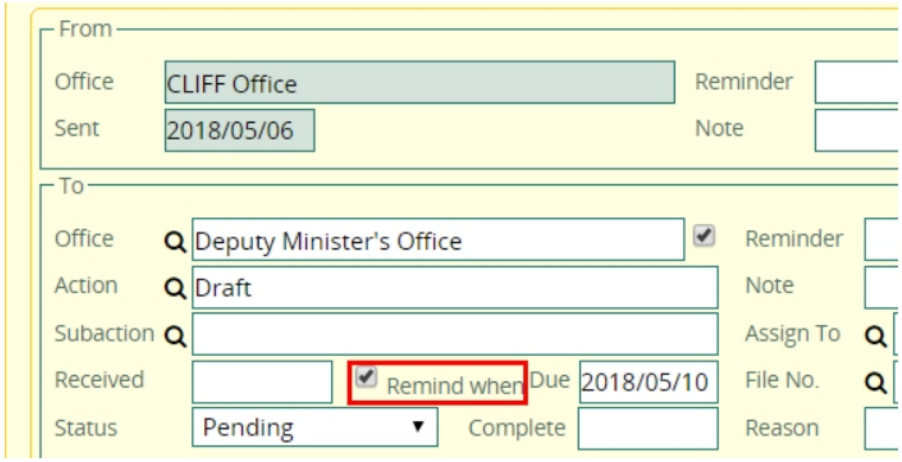


The **Email Log** functionality will also allow you to select which parts of the Log are included in the email, and which attachments.

Automatic Referral Reminders

If the feature is enabled in your organization, an additional checkbox will appear in each Referral called **Remind when Due**. If checked this will send a reminder to the contact(s) for the office. Your CLIFF Administrator will set the number of days prior to the due date to send the email (i.e. if the number is set to 3, you will receive a due date reminder email 3 business days before the due date).

The checkbox will be checked by default but can be deselected to stop the reminder from being sent on any specific Referral. The reminder will be sent to the contact(s) for the office in the early hours of appropriate day.

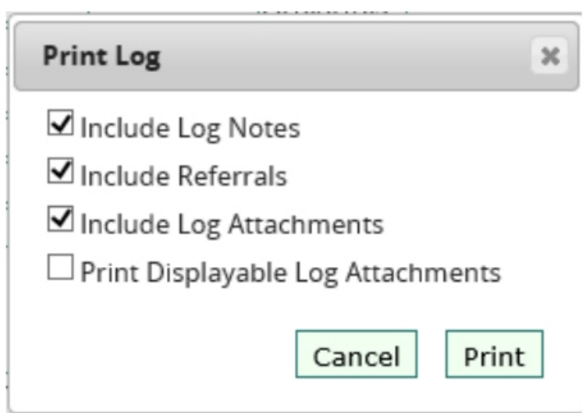


Printing a Log

The details from the Log screen can be printed at any point after the Log has been saved.

1. Click the **Print** icon within a Log

2. From the popup window, deselect a checkbox to exclude that part of the Log from your Referral Slip



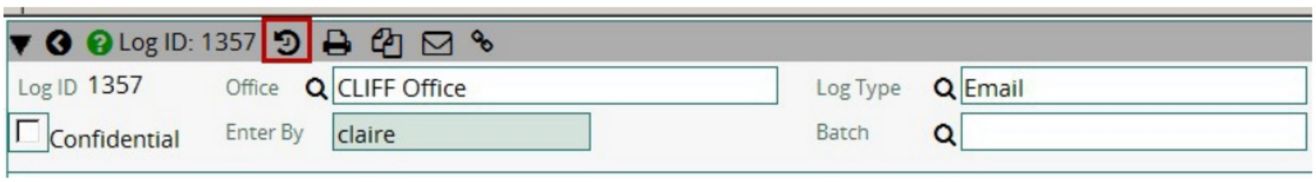
3. If you need to print any attachments on the Log, click the **Print Displayable Log Attachments.** This will print the contents of any attachments that can be read by the system (others may have to be opened and printing individually)
4. Click the **Print** button to continue to the print preview of the **Referral Slip**

5. Use your browser's print settings to send the Referral slip to the printer

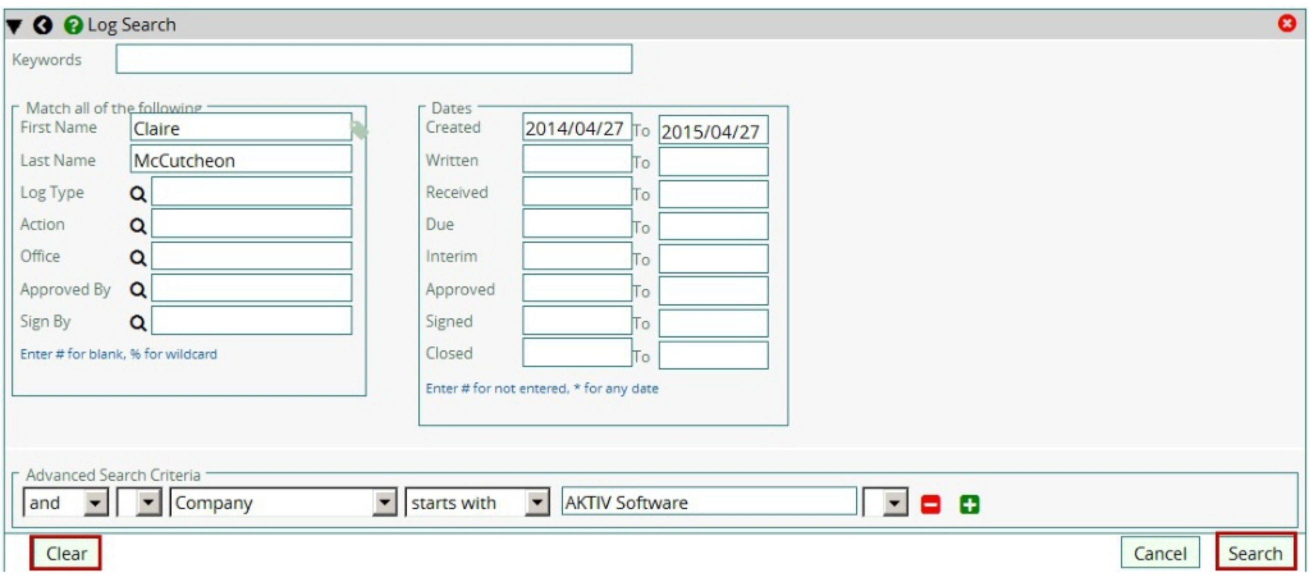
Search for History

Logs can be cross-referenced with other Logs with a hyperlink to the cross-referenced Log.

1. From the top section of the Log, click the **Search for History** icon



2. The search window will display the primary author from the Log. If you need to search for a different author or use a keyword, click **Clear** and enter in the revised criteria.
3. Once the criteria is correct, click **Search**



4. If there are Logs that meet your criteria, they will be listed on screen. Any Log can be opened and viewed by clicking the Log ID. If you would like to cross-reference any of the Logs on the list, click the checkbox in the first column and then click the **Bookmark in Log Notes** icon

Log Search Claire [46]

		ID	Author	Company	Subject	Log Type	Action	Due		Received	Closed
☑		1290	McCutcheon, Claire	AKTIV Software	test	Briefing Note	Signature-Other	2015/02/07	-227	2015/01/31	
☐	3	1325	Virk, Amrik	MTICS		Letter	Reply Direct	2010/03/11		2010/02/19	2012/08/28
☐	1	1334	Simon, Paul		test	Letter	Reply Direct	2015/03/01	-212	2015/02/22	
☐	3	1340	Abrams, Janae		Test	Letter	Reply Direct	2015/03/04	-210	2015/02/25	
☐		1341	Abrams, Janae		Test	Letter	BN-Decision Note	2015/03/05	-209	2015/02/26	
☑	5	1342	McCutcheon, Claire	Aktiv Software		Letter	Advice	2015/03/12		2015/03/03	2015/04/27
☐	4	1346	McCutcheon, Claire	Aktiv Software	training	Letter	Reply Direct	2015/03/25	-195	2015/03/05	
☐		1357	McCutcheon, Claire	AKTIV Software	test	My choice	Bullet Points	2015/03/24	-196	2015/03/17	
☐	1	1358	McCutcheon, Claire	AKTIV Software	training	Email	Reply Direct	2015/04/09	-186	2015/03/18	
☐	2	1360	McCutcheon, Claire	AKTIV Software		Letter	Reply Direct	2015/03/26	-194	2015/03/19	

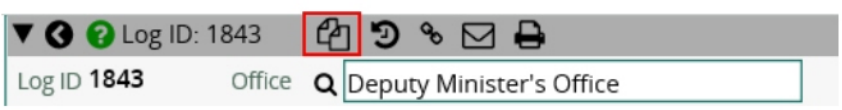
1 2 3 4 5 >

5. The cross-reference information, with a hyperlink to the Log, will be displayed in the **Log Notes**

The information contained in the Log Notes is set by your ministry's CLIFF Administrator and may vary from ministry to ministry.

Duplicating a Log

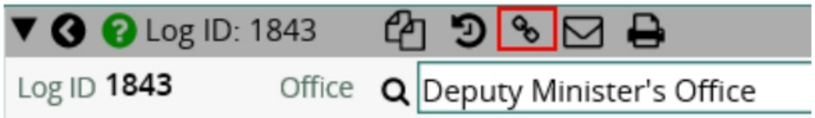
An existing Log can be duplicated to save time with data entry. Once the existing Log is open, click the **Duplicate** icon for the duplicate Log to appear.



The new Log will include the contents from all the primary address and Log fields (excluding the **Closed** date) but will not include the **Notes**, **Attachments** or **Referrals** from the previous Log.

Link to Log

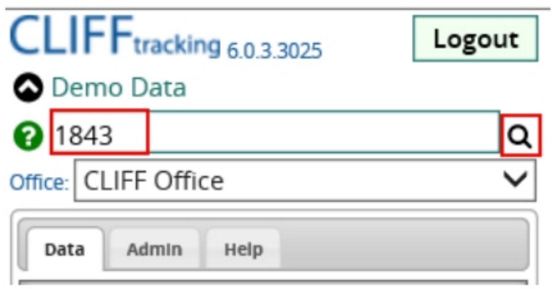
Some organizations use additional applications to manage the creation and updates to the document (such as e-Approvals). You may be required to include a link to the CLIFF Log in this other application. To access the link, right-click the **Link to this Log** icon and select **Copy Shortcut**. The link can be pasted into the other application.



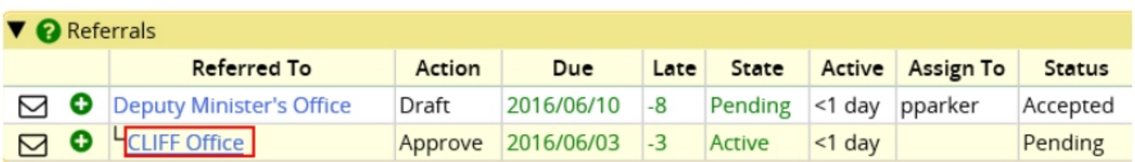
Updating and Completing Referrals and Logs

When a Referral is received for your office, you can track the work done in your office within your Referral.

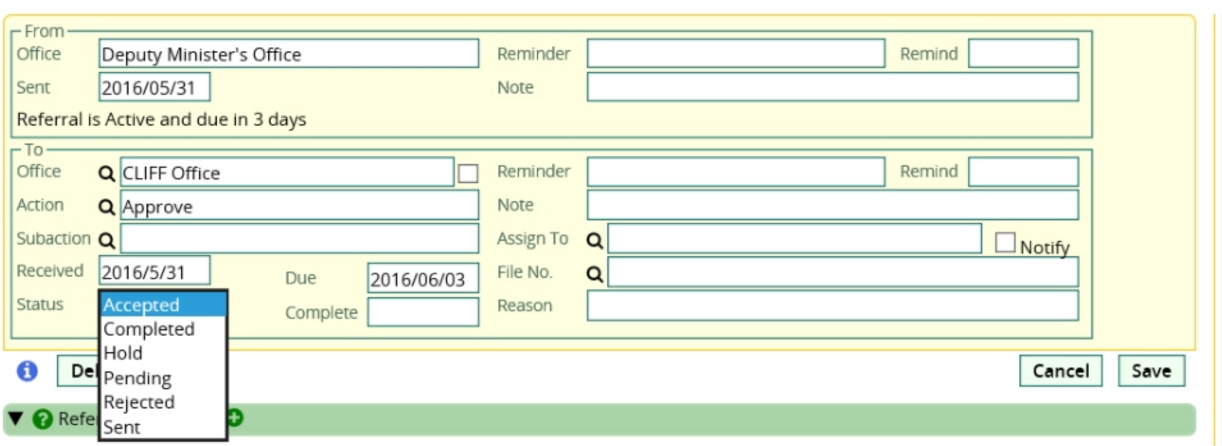
1. You will receive notification that you have been sent a Referral (usually through email) that will include the CLIFF number. To search by the CLIFF number, enter the number in the **Quick Search** and click **Enter** (from your keyboard) or click the **Search** icon.



2. When the Log opens, find the Referral to your office and click your office name to open the Referral window

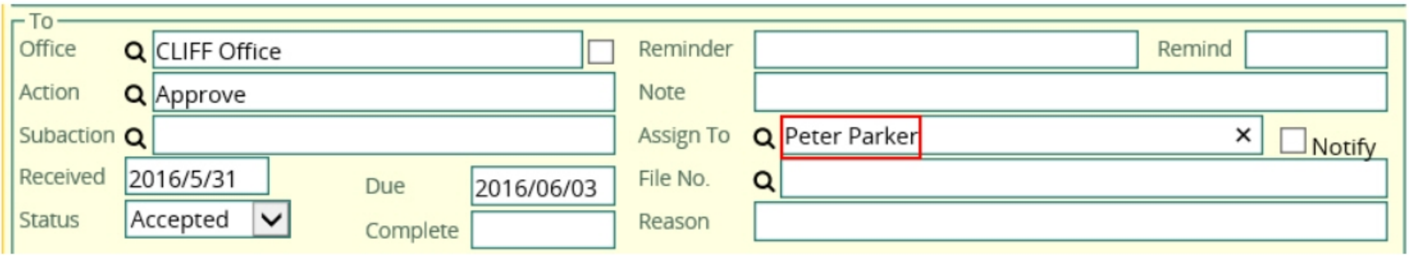


3. From the **Status** list, select **Accepted** to indicate that your office accepts the assignment



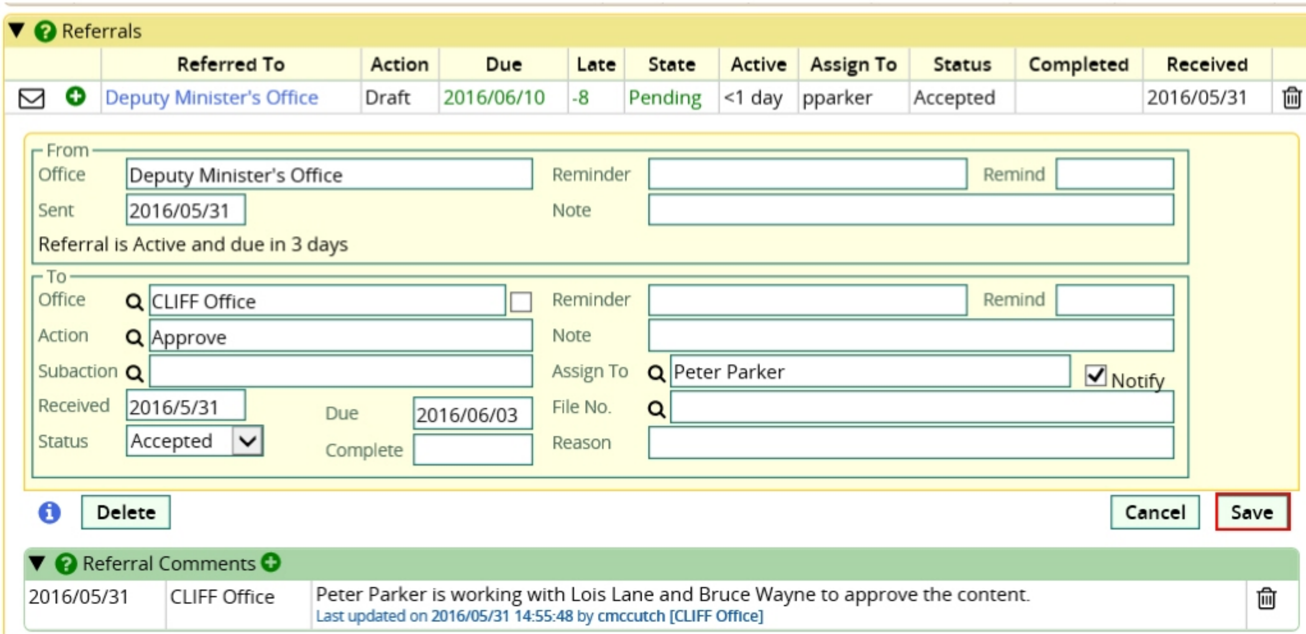
If the assignment has been sent to you in error, select **Rejected** and in the **Reason** field, provide an explanation for why this should not have been directed to your office.

4. In the **Assign To** field, select or enter the name of the person within your office who will be working on the assignment (if there are multiple people passing the assignment between them, it is sufficient to identify a key contact).



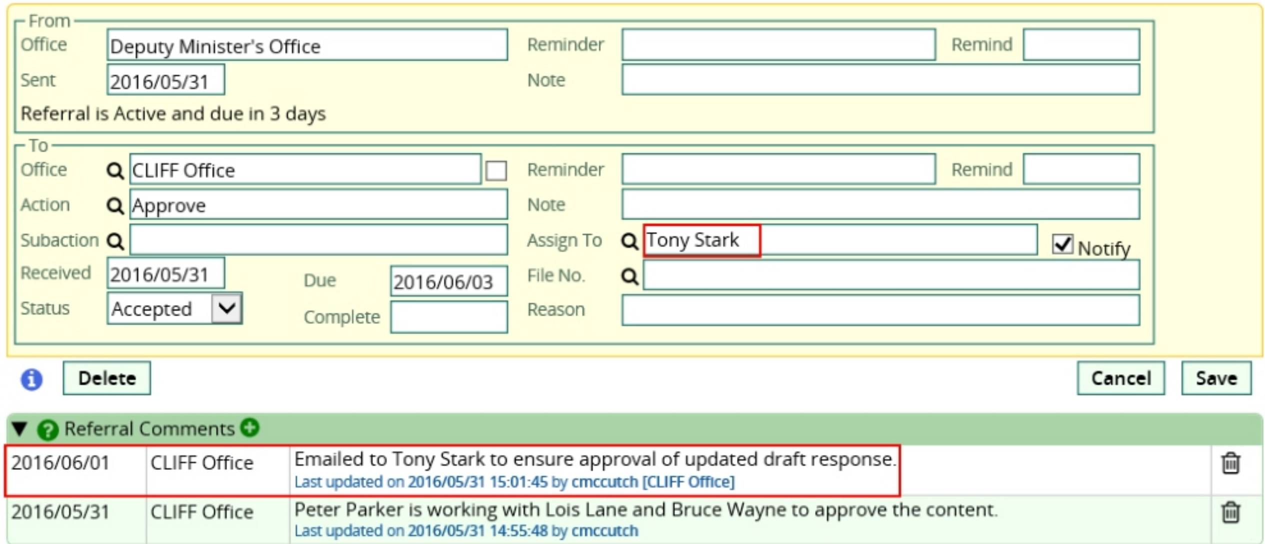
5. If there are additional details on the tracking of the assignment, enter them in the **Referral Comments** by clicking on the **Add** icon and entering the information before clicking **Save**

6. Click to **Save** the Referral

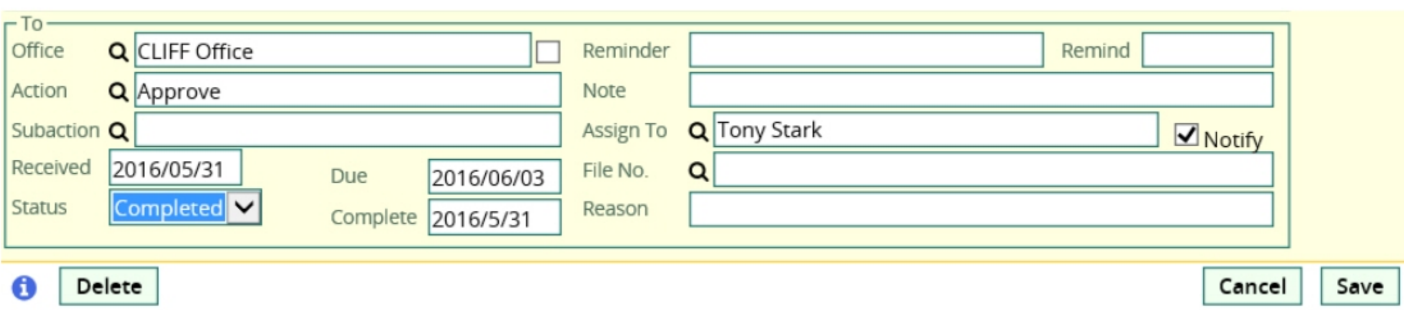


7. If there is information that needs to be shared with other offices working on the assignment, that information can be added to the **Log Notes** to ensure that it is easily visible to all users

8. During the time the Referral is active in your office, you can continue to update the Referral



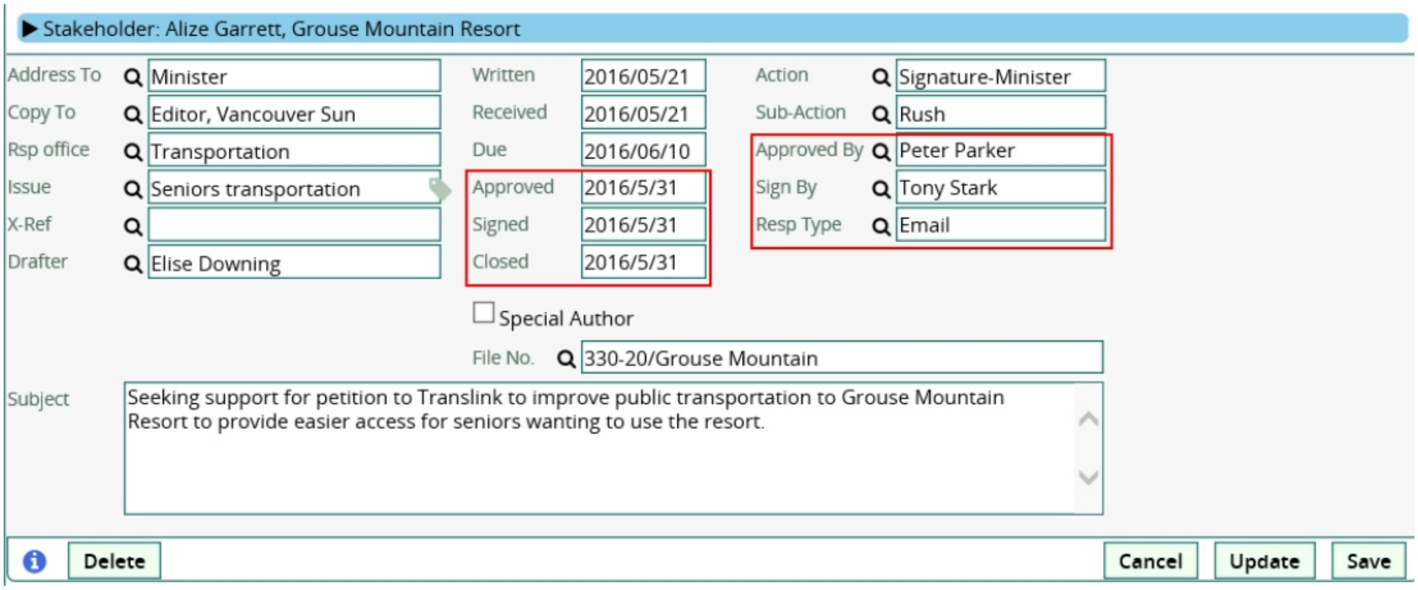
9. When the assignment leaves your office, update the **Status** to **Completed** if your office has completed all work on the assignment. You can also select **Completed w/Rev** to track that the work was completed but revisions were required.



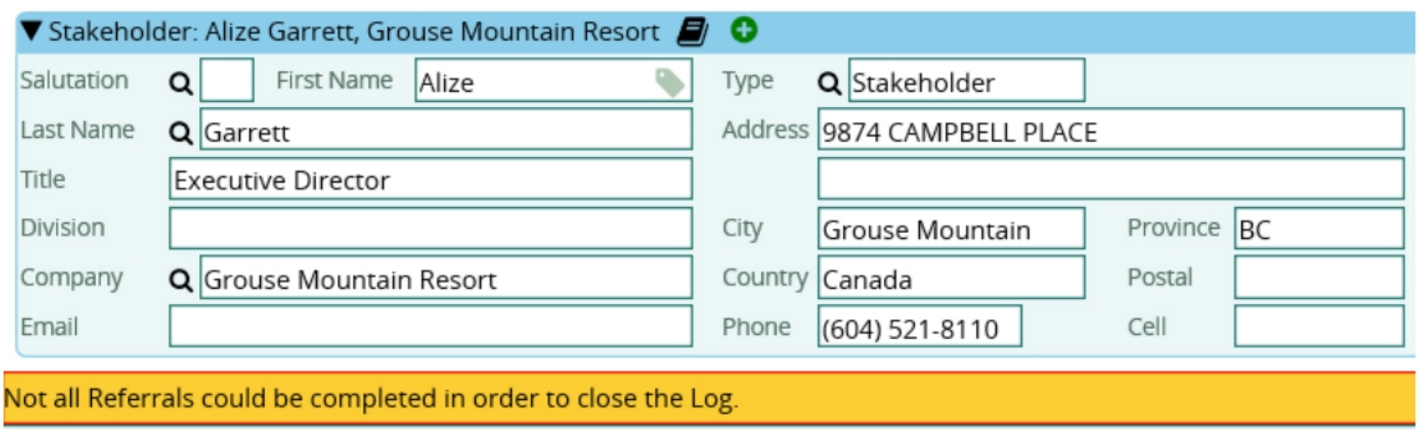
However, if your office is sub-referring the assignment to another office and needs the assignment back later in the process to complete the work, do not complete the Referral. (*Note: some organizations do not follow this rule and complete the Referral every time the assignment leaves their office. Check with your CLIFF Administrator for the rules for your organization*).

10. If the assignment is going to another office, ensure that the receiving office has an open Referral. If not, create a sub-Referral to their office by using the **Add** icon in front of your Referral.

11. If you are the last office to handle the assignment, close the Log by ensuring that all relevant fields are updated (such as **Signed**, **Sign By**, **Resp Type**, etc) all attachments are added, and by entering a **Closed** date. If the assignment is only for information, you may only require the **Closed** date.



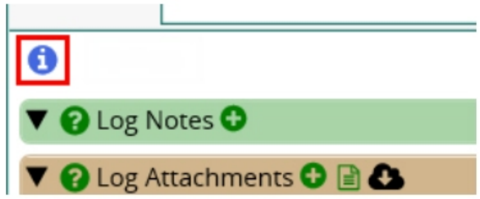
If you get an error message when you attempt to close the Log, this may mean that a Referral is still open to an office that you cannot access. This is a security feature to prevent users from completing other office's Referrals. If you see the message, contact the office with the open Referral and request that they complete the Referral so that you may close the Log.



Viewing Log History

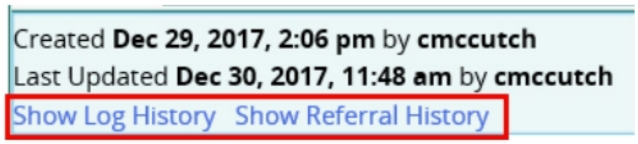
All changes to a Log are audited and can be viewed by an authorized user.

1. Click the **Update Information** icon in the Log or Referral



The last update to the Log/Referral will be displayed.

2. For additional information and previous updates, click the **Show History** link for either the Log details or Referrals



If you are viewing the Log history, you will see any changes made to the main Log fields. The Referral history will display changes to the Referral.

Last Updated Nov 21, 2016, 3:29 pm by cmccutch

Org	Date	Event	Field	From	To	By
This Org	Today	Add	Drafter		Damon Crews	cmccutch
This Org	Today	Change	Action	Signature-ADM	Draft Briefing Note	cmccutch
This Org	2016/10/19	Create				cmccutch

The history will include the following columns:

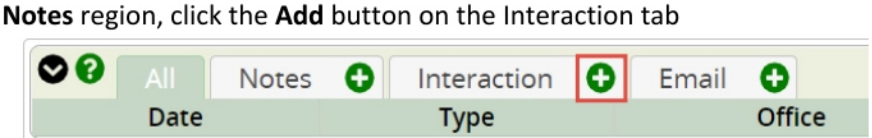
- **Org** – the organization where the change was made. This will primarily display **This Org**, unless the Log originated in another ministry and was transferred to your CLIFF database.
- **Date** – the date of the change/addition
- **Event** – will display **Add**, **Change** or **Delete**
- **Field** – the field the change was made
- **From** – the “before” value if applicable (will display as blank if the field was empty before the change)
- **To** – the new value (will display as blank if a value was deleted)
- **By** – the CLIFF ID of the user

3. Click the close icon to hide the update history

Interactions

There is an option to include an additional tab to the **Notes** region to track interactions (typically phone calls and/or emails with the contact). Please note that your organization may have chosen to hide this functionality.

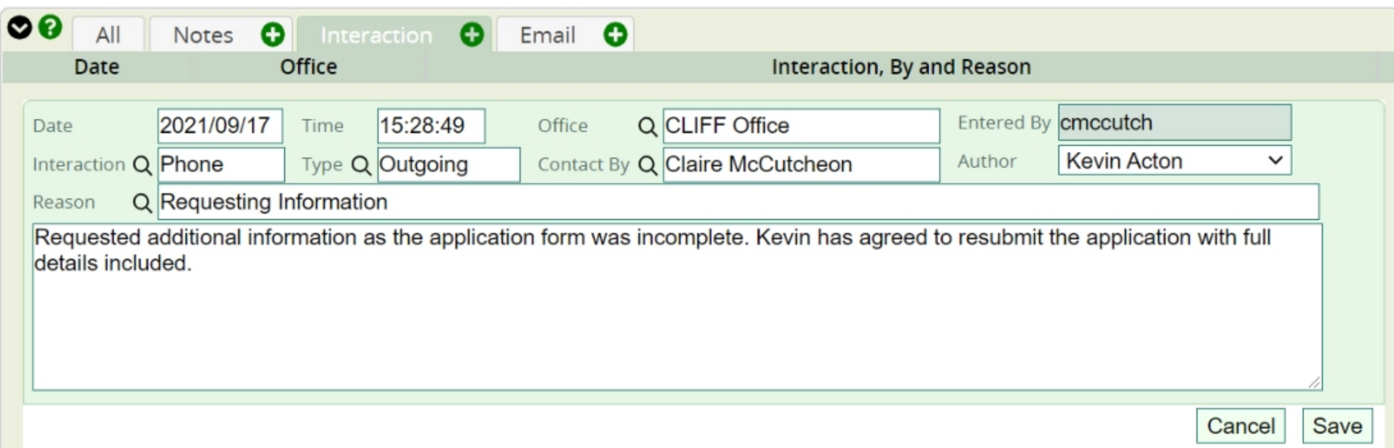
1. From the **Notes** region, click the **Add** button on the Interaction tab



2. Select an **Interaction** from the drop-down menu. Options will include:
   - **Email**
   - **Letter**
   - **Meeting**
   - **Phone**

3. Select a **Type** from the drop-down menu. Options will include:
   - **Incoming**
   - **Outgoing**

4. Enter a **Contact By** (there may be a list of values available) to identify who is making contact with the Author
5. The **Author** field will be pre-populated with the Primary Author's name (from the Author regions at the top of the Log). If there is more than one Author displayed in the Log, you may select a different Author from the drop-down list.
6. Enter a **Reason** for the Interaction (there may be a list of values available)
7. Enter the details of the interaction in the text box



8. Click the **Save** button

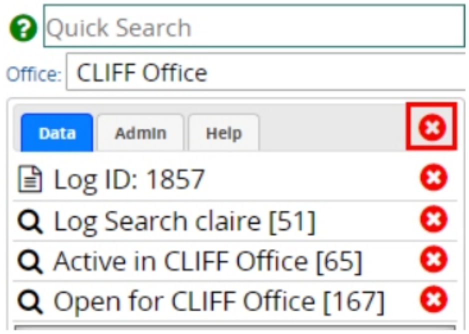
The Interaction is displayed in the list.

Log and Referral Menus

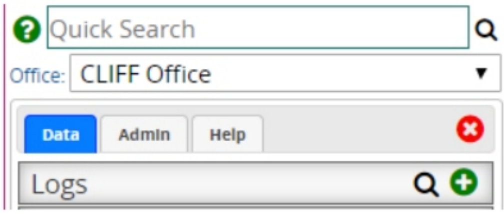
Clicking on the **Logs** or **Received** and **Sent** Referral menus, opens a sub-menu of built-in searches.

Note that when you open a Log or your search generates a list, those stay available to you at the top of the menu. You may to close all open items (Logs, search results, reports, etc.) with one click.

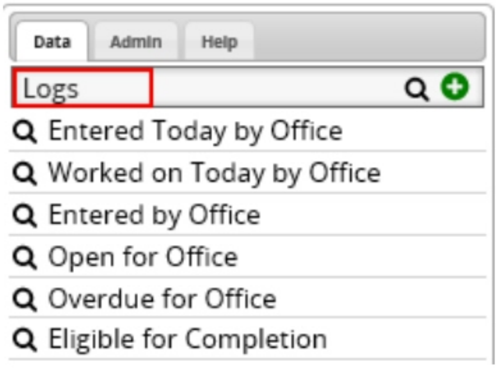
1. Click the **Close** icon at the top of the menu.



All open items are closed.

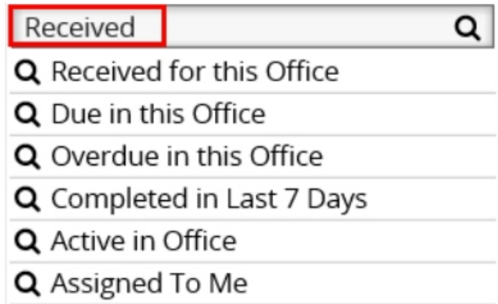


Logs Menu



- **Entered Today by Office** - generates a list of Logs entered by your current office today
- **Worked on Today by Office** – generates a list of Logs that have saved changes by a CLIFF user in your office
- **Entered by Office** – generates a list of all the Logs created by your office in your default search range (date range can be viewed and modified in User Preferences)
- **Open for Office** – generates a list of all the Logs created by your office that do not have a Closed Date in your default search range
- **Overdue for Office** – generates a list of all the Logs created by your office in your default search range that have passed the Due Date and do not have a Closed Date
- **Eligible for Completion** – generates a list of all the Logs created by your office in your default search range that do not have a Closed date and any Referrals are either completed or have no due date

Received Menu



- **Received for this Office** - generates a list of Referrals sent to your office that are open, including those with or without due dates and that are active or pending
- **Due in this Office** – generates a list of Referrals sent to your office that are open, have due dates and that are active or pending
- **Overdue in this Office** – generates a list of Referrals sent to your office that are open and overdue including those that are active or pending
- **Completed in Last 7 Days** – generates a list of Referrals sent to your office that have a Completed Date in the last 7 days
- ***Active in Office** – generates a list of Referrals sent to your office that are open, have due dates and that are active in your office
- **Assigned To Me** – generates a list of any Referrals that have your IDIR ID in the **Assigned** To field of an open Referral

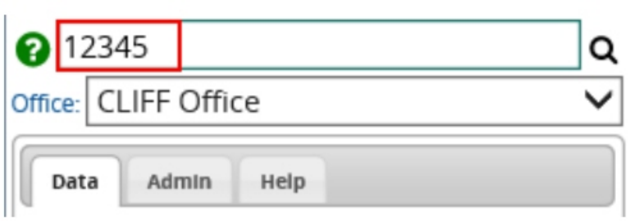
**This report is most frequently run as it finds all open Referrals where your office is the office currently working on the assignment.*

Once the list is on screen, it can be printed or emailed.

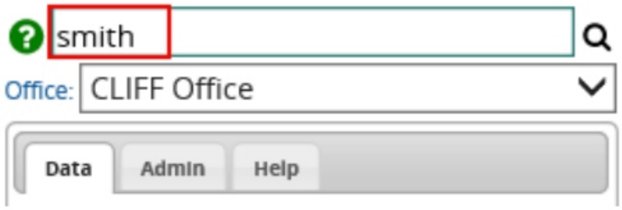
Searching

Quick Search

The **Quick Search** on the CLIFF menu allows you to search by keyword (instructions for **Keyword Searching** are included below), or CLIFF ID.

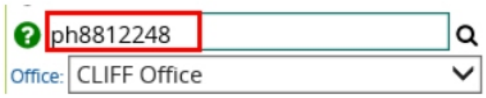


Or



Enter your criteria and click the search icon or **Enter** on your keyboard.

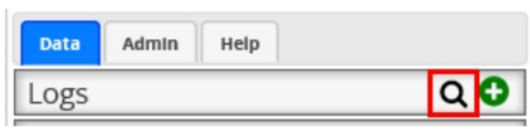
If you are searching for all or part of a phone number, you must prefix the criteria with **ph** so CLIFF knows to search the phone number fields and does not search CLIFF IDs.



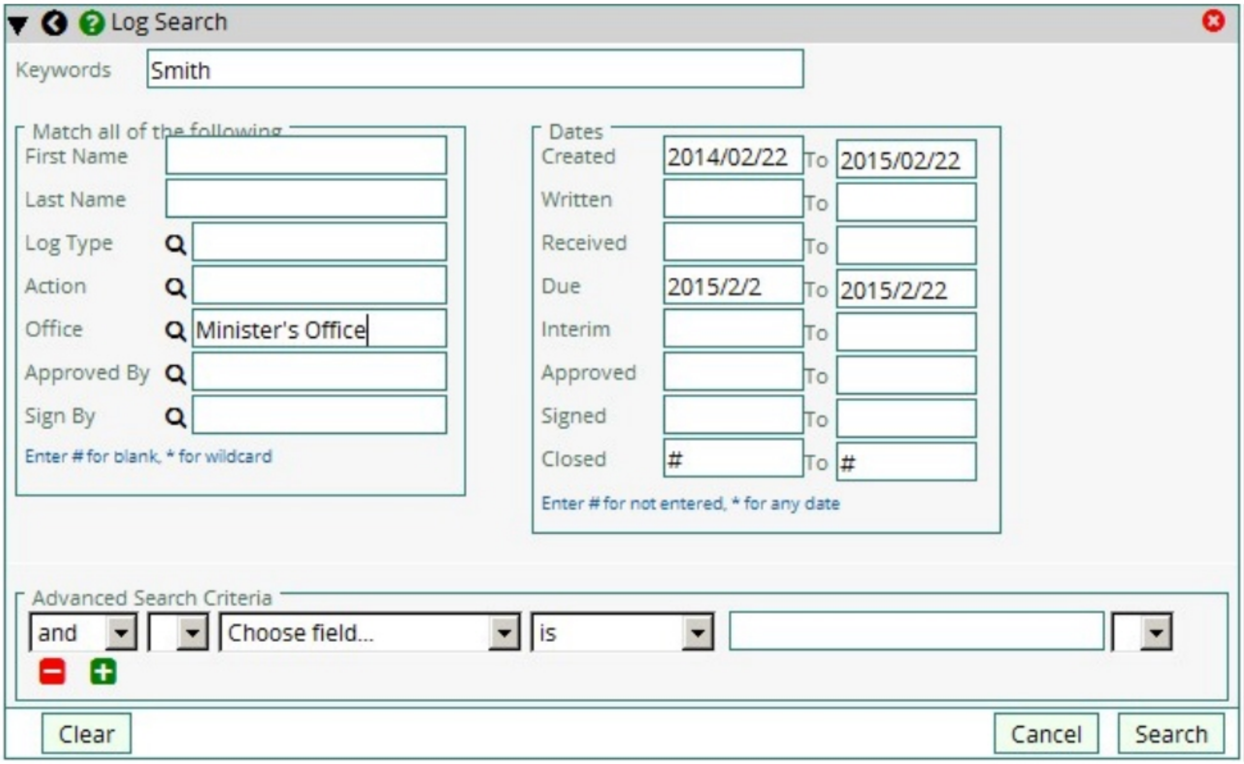
Note: the **Quick Search** only searches for in your default search range (usually one or two years). See the section on setting the Active Period for information on viewing or changing you default search range.

Log Search

1. Click the search icon from the **Logs** menu item

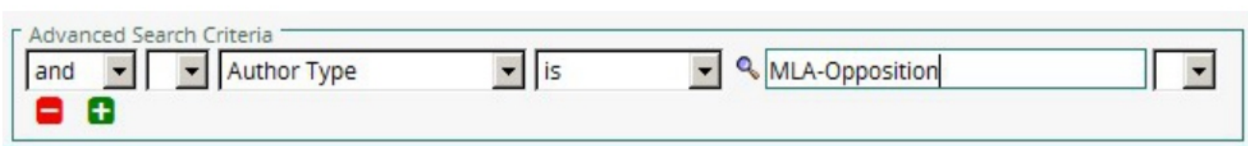


2. Enter your criteria in the available fields (your search may or may not include keywords)

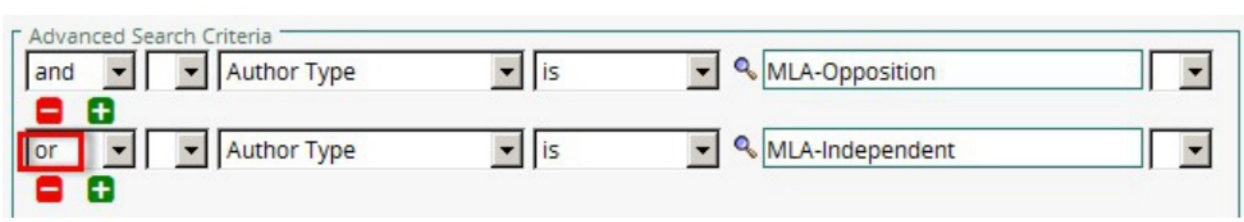


This example is looking for all Logs with a keyword of "Smith" created between 2014/02/22 and 2015/02/22, Due between 2015/02/02 and 2015/02/22 that are NOT CLOSED (no date is in the Closed Date field).

3. If the field required is not displayed on screen, it can be selected in the **Advanced Search Criteria**.



4. Additional rows of criteria can be added by using the Add icon and rows removed with the **Remove** icon. The first field can also be change to OR to look for multiple different values in the same field.



When searches contain at least one an “or” phrase in addition to other criteria, brackets must be used to ensure that your search is correct.
As an example, you are searching for *all letters or emails received in the last 90 days on the issue of homelessness*.
Your criteria is:

- **Issue** is **Homelessness**
- **Date Received** is within the last **90 days**
- **Log Type** is **Letter** OR **Log Type** is **Email**

When “or” is used in a search, CLIFF will look for all records that match the first set of criteria - which is everything before the word “or.” In this case this is:

- **Issue** is **Homelessness**
- **Date Received** is within the last **90 days**
- **Log Type** is Letter

Then CLIFF will look for all records that match the second set of criteria – which is everything AFTER the word “or.” In this case this is:

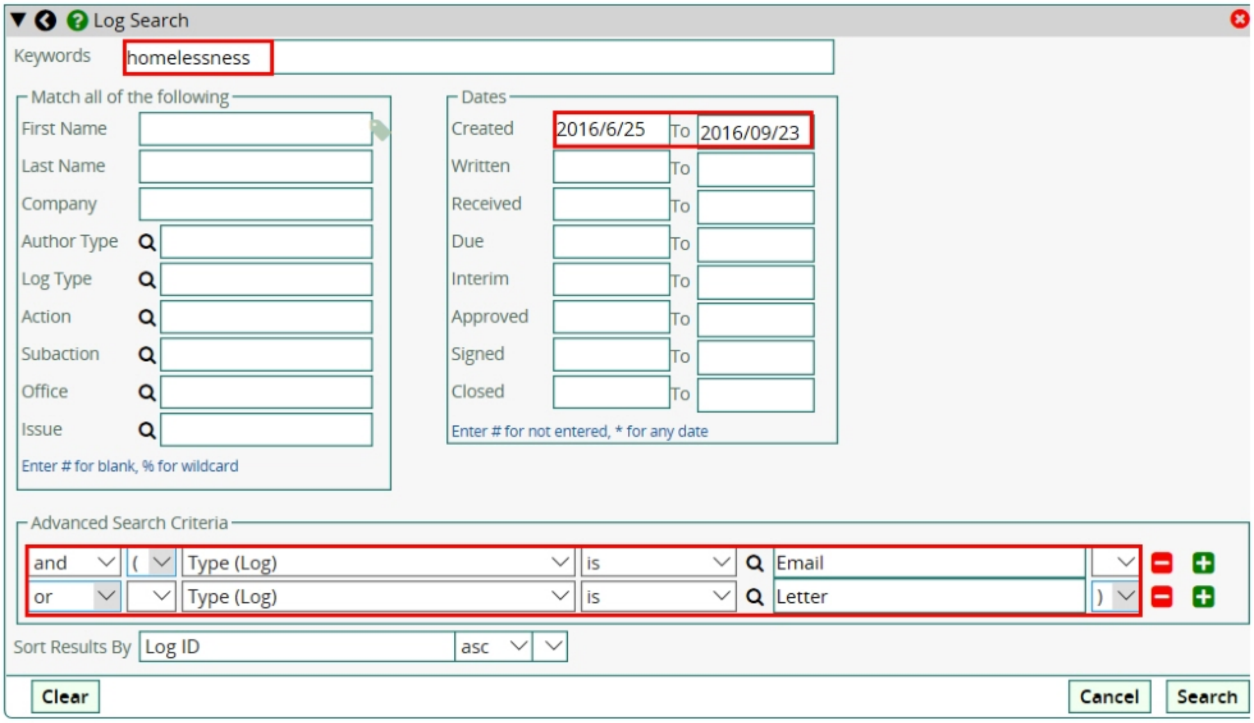
- **Log Type** is **Email**

So the search without brackets will include ALL records in your CLIFF database that have a **Log Type** of **Email** which isn’t what we want.

In order to apply the other criteria (Homelessness and last 90 days) we add brackets:

- **Issue** is **Homelessness**
- **Date Received** is within the last **90 days**
- (**Log Type** is Letter OR **Log Type** is **Email**)

This ensures that the criteria outside of the brackets applies to the criteria inside the brackets.
This search is set up in **Log Search** like this:

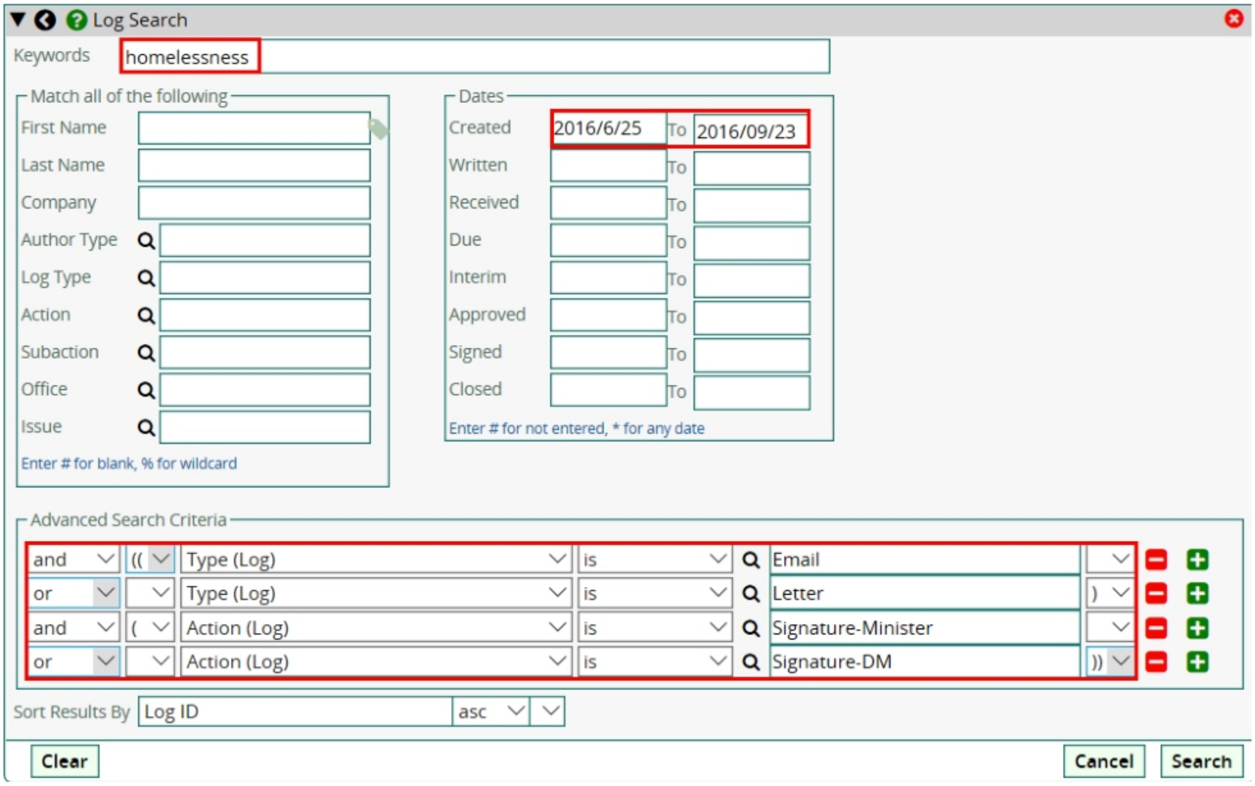


If we have two sets of "or" criteria, you will need multiple brackets to ensure that the other criteria applies to both "or" phrases.

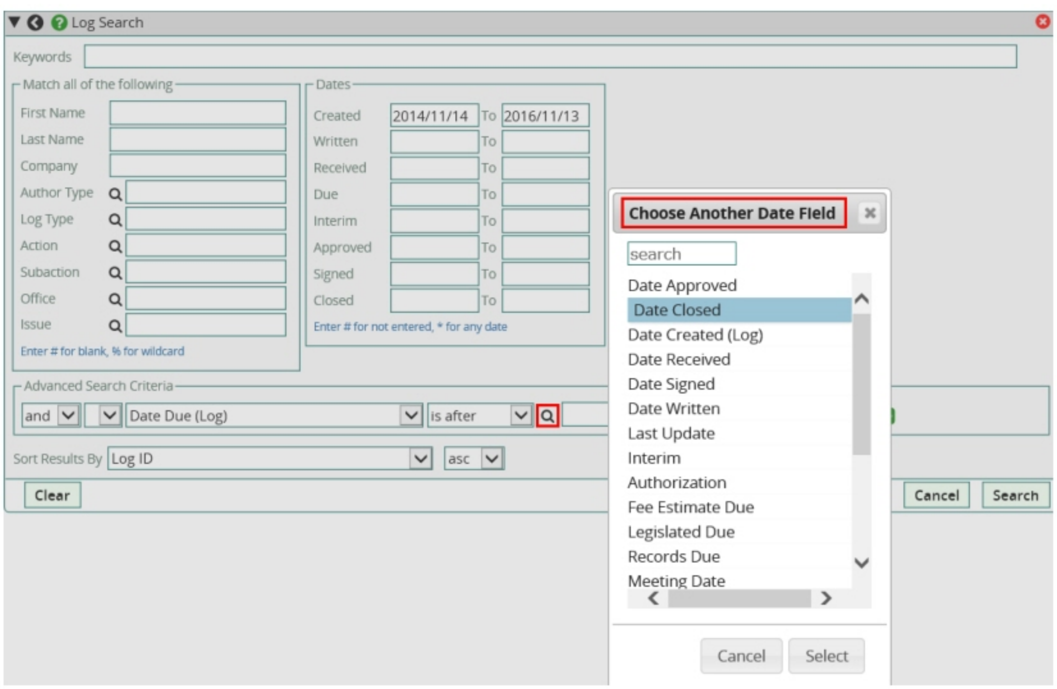
As an example, you are searching for *all letters or emails on Homelessness that received a letter signed by the Minister or the Deputy Minister in the last 90 days*.

- **Keyword** is **Homelessness**
- **Date Received** is within the last **90 days**
- ((**Log Type** is **Email**
- OR **Log Type** is **Letter**)
- AND (**Log Action** is **Draft Minister**
- OR **Log Action** is **Draft Deputy**))

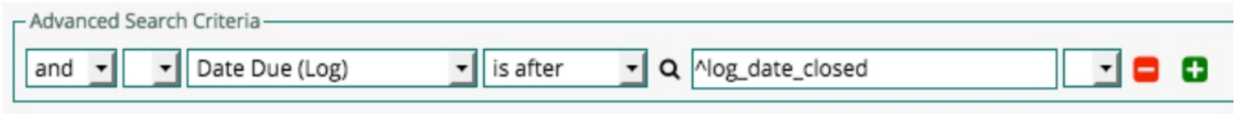
This ensures that the criteria of Homelessness and the date range apply to both "or" phrases.
This search is set up in **Log Search** like this:



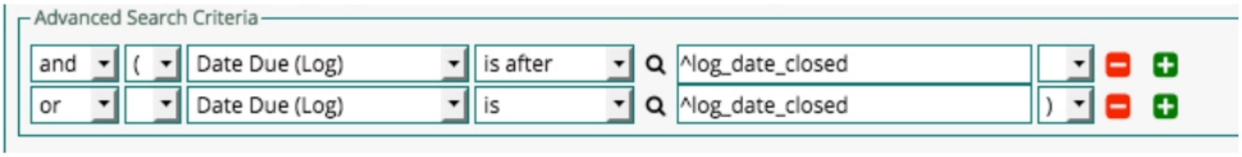
Users can also select two different date fields to compare in the **Advanced Search Criteria**. For example, users can search for all Logs where the **Date Due** is after **Date Closed**.



Once the second field has been selected, it will display like this:



Another example is finding Logs where the **Date Due** is after or equal to **Date Closed:**



Keyword Searching

Keyword searching will search all the main Log fields and the Log Notes. If your organization has attachment keyword indexing turned on, the keyword search will also search the contents of your Log attachments.

AND (&) OR (|)

- If you enter more than one word, the Boolean AND is implied:

  For example, searching dog cat would search for Logs that have at least one occurrence of 'dog' AND 'cat'

- If you want to find Logs that contain any of the search words, you must enter 'or' between the words:

  For example, searching dog or cat would find Logs contain at least one occurrence of 'dog' **or** 'cat'

- If you combine 'and' and 'or' in search queries be aware there is an operator precedence in which 'and' will take precedence over 'or':

  For example mouse or dog and cat will search for Logs that contain at least one occurrence of 'mouse' OR Logs that contain at least one occurrence of both 'dog' AND 'cat'

Wildcard (%)

The wildcard character can be used to expand word searches into pattern searches. Use **%** to search for words that match the wild carded term with zero or more characters in place of the **%**.

For example d%g would find 'dog', ‘dug’, “dunking”, etc.

Soundex (!)

Use the soundex (**!**) operator to expand queries to include words that have similar sounds; that is, words that sound like other words. This function enables comparison of words that are spelled differently, but sound alike in English.

For example, !anderson would find 'anderson', 'andersen', 'andersson'.

NOT (~)

Use the NOT (~) operator to search for Logs that contain one query term and not another.

For example transportation ~ boats would find all Logs with the word 'transportation' and not 'boats'.

Similarly transportation not (boats or trains) would find Logs with ‘transportation’ and not ‘boats’ or ‘trains’.

Stem ($)

Use the stem (**$**) operator to search for terms that have the same linguistic root as the query term.

For example $sing would find ‘sang’, ‘sung’ and ‘sing’.

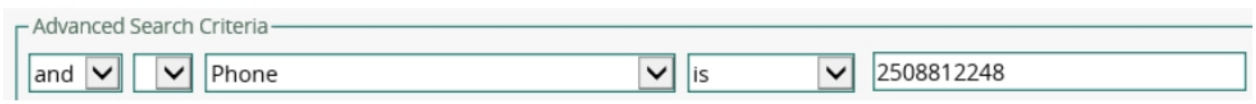
Phrases (“”)

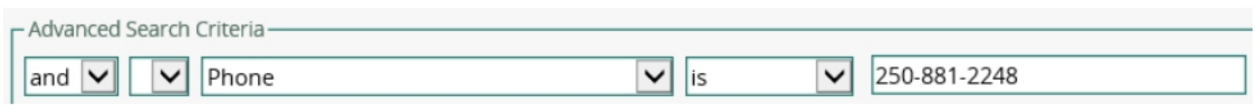
To search for Logs that have a series of words in a phrase, add quotation marks around the series of words.

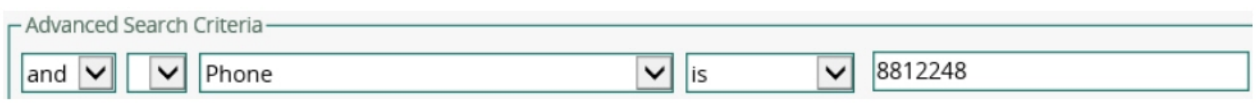
For example “Royal Columbia Hospital” will only find Logs were those words appear side-by-side in that order where searching Royal Columbia Hospital (without the quotation marks) could find Logs from a person living on Royal street, in British Columbia who was writing about a different hospital.

Searching Phone Numbers

If you have entered the number using hyphens and parentheses, CLIFF will strip them out before storing. This allows you to search on part of a phone number. For example, all the following examples will find 250-881-2248:







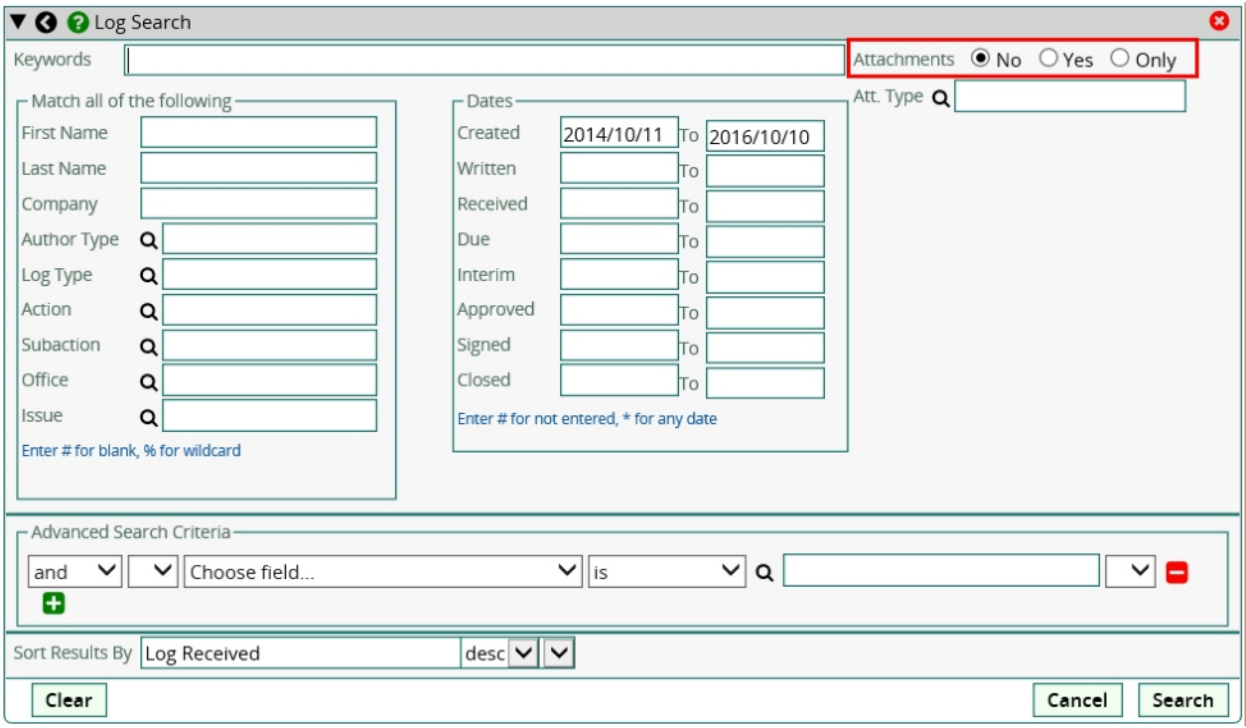
Searching Attachments

To keyword search the attachments stored in CLIFF the attachments must be in a format that allows keyword searching (i.e. Word, Excel, Email Message, some PDF formats, etc.). It is important to keep in mind that CLIFF can only keyword search attachments if the document is stored in a way that the text can be read as individual words (attachment must have ASCII Text in it).

Scanned documents are often scanned as images, which will contain no text at all. The scanner is basically taking a photo of the text which is unreadable for indexing. Some scanning software has OCR capabilities, which means the scanning software will attempt to find text and store it in the resulting image or PDF. This may result in the file containing some text which can be indexed by CLIFF. If you scan documents, see if your scanner has OCR capabilities. If so turn it on. The preferred format to store the resulting scan is as a PDF. For documents created by your ministry save the original Word document, not a scanned copy. If the document is being stored in CLIFF as a reference, you may want to consider storing it as a PDF which is more portable across devices.

To facilitate searching attachments, the **Log Search** window includes new options:

- **No** - excludes attachments from your search
- **Yes** - includes attachments in your search
- **Only** - only searches the attachments

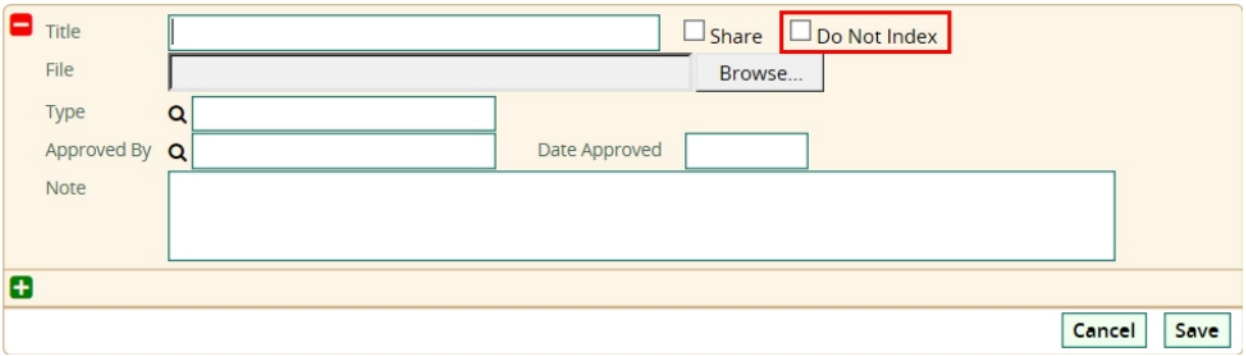


If there are multiple versions of the document in CLIFF, and they are version numbered, only the most recent version is indexed.

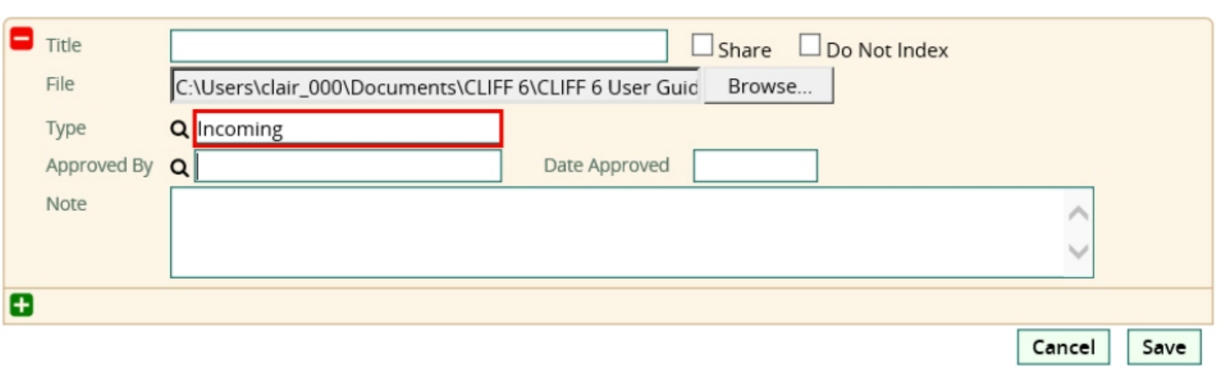

Log Attachments

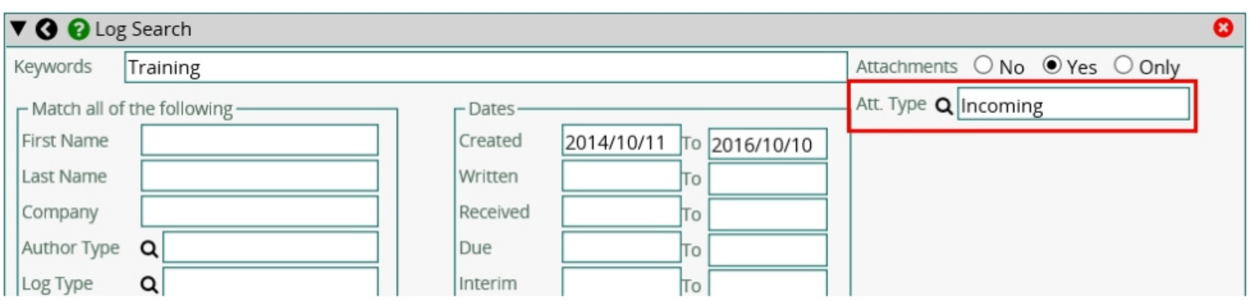
		Title	Size	Type	Version	Approved	Approved By	Added By	Last Update
		Sample Document	14.5 KB		1			cmccutch	2016/09/23
		Sample Document	14.5 KB		2			cmccutch	2016/09/23

In addition, the **Attachment** window includes a **Do Not Index** checkbox that gives users the opportunity to block an attachment from being keyword indexed. This would exclude the attachment from all searches.



If the **Attachment Type** field is populated in your **Attachment** window, you can also limit your searches to attachments of that type.

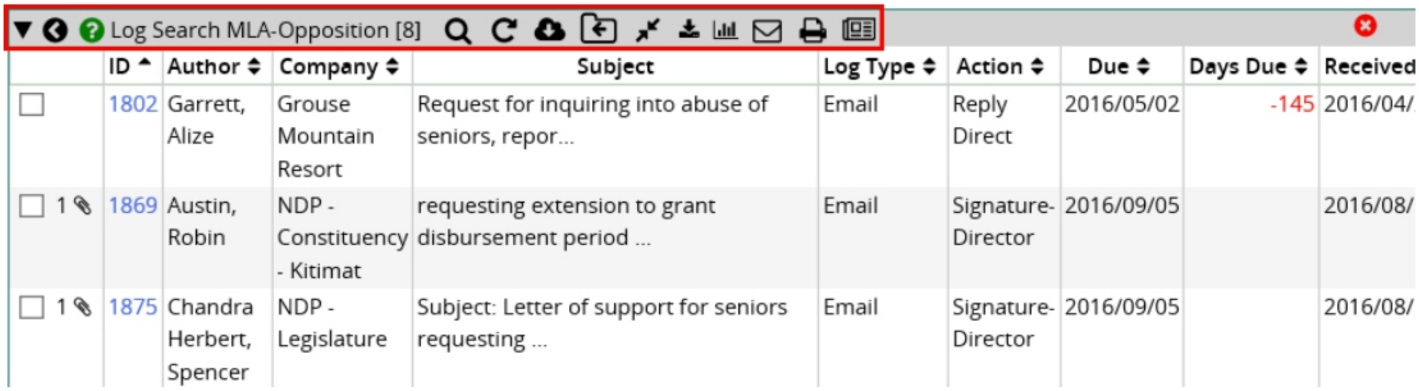




To search the attachments in an individual Log, type in your keyword(s) in the search field in the **Attachment** header.

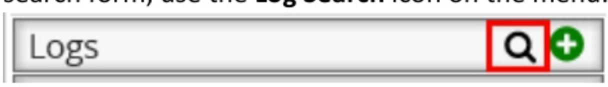
Viewing a List of Search Results for Logs

Once your results are listed on screen, the upper menu provides a number of options. The header will give you a summary of your search criteria (i.e. **Log Search MLA-Opposition** as this was a search for Logs where the **Author Type** is **MLA-Opposition**).

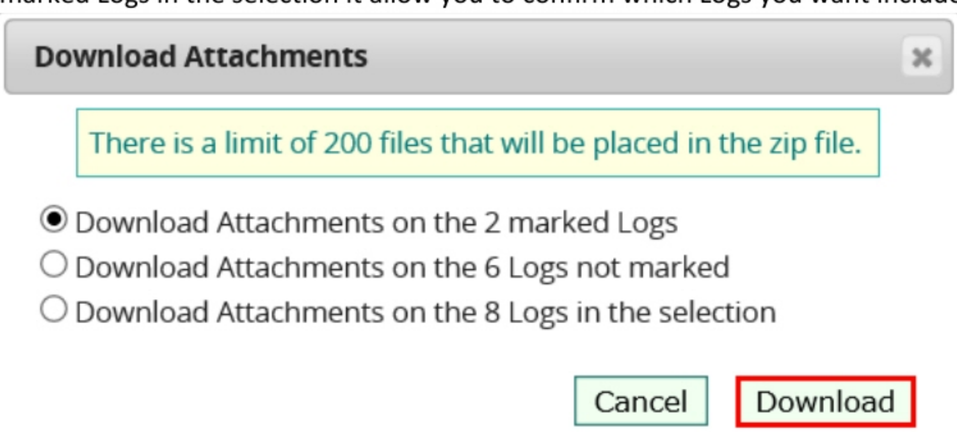


	ID	Author	Company	Subject	Log Type	Action	Due	Days Due	Received
	1802	Garrett, Alize	Grouse Mountain Resort	Request for inquiring into abuse of seniors, repor...	Email	Reply Direct	2016/05/02	-145	2016/04/
1	1869	Austin, Robin	NDP - Constituency - Kitimat	requesting extension to grant disbursement period ...	Email	Signature-Director	2016/09/05		2016/08/
1	1875	Chandra Herbert, Spencer	NDP - Legislature	Subject: Letter of support for seniors requesting ...	Email	Signature-Director	2016/09/05		2016/08/

-  - Columns can be sorted by using the direction arrows in the column headers
-  - You can return to the original search to review or change your criteria by clicking the **Search** icon on the list. If you want to keep these results on screen and do another search for comparison or start with a blank search form, use the **Log Search** icon on the menu:

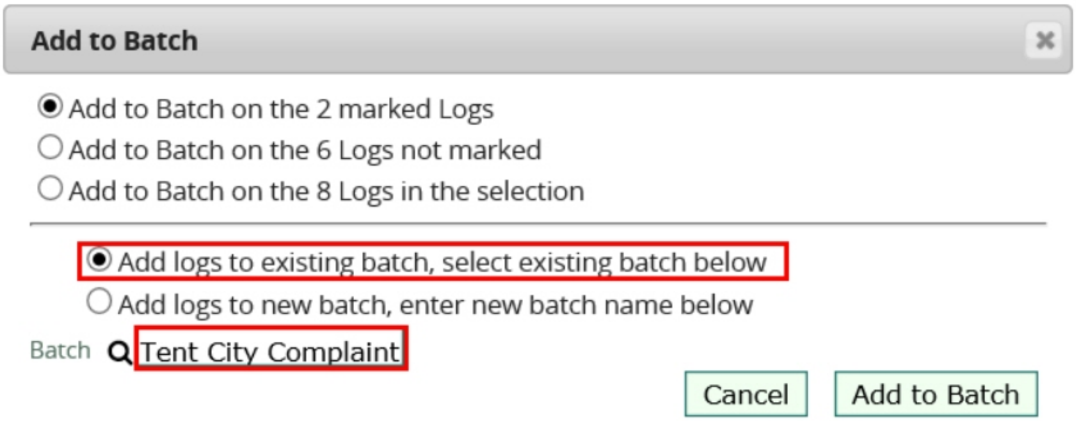
-  - If the information in the Logs has been updated (i.e. you have updated the **Closed** date on a few Logs), clicking the **Refresh** icon will update the list
-  - To download the attachments from a list of Logs, click the **Export** icon and select **Download Attachments** from the menu. The **Download Attachments** window will appear and if you have check-marked Logs in the selection it allow you to confirm which Logs you want included in the download:

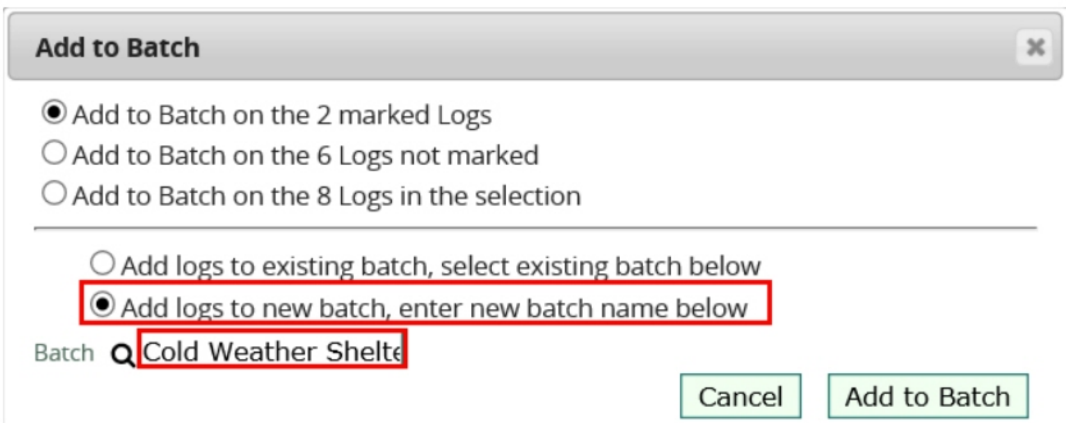
  Click the **Download** button and follow your browser's instructions to save the documents

-  - The **Add to Batch** icon allows you to add a regular Log to an existing batch or to use the Log to create a new batch.

    a) If you are adding the Log to an existing batch, leave the **Add Logs to existing batch…** option selected and find the batch name in the **Batch** field:

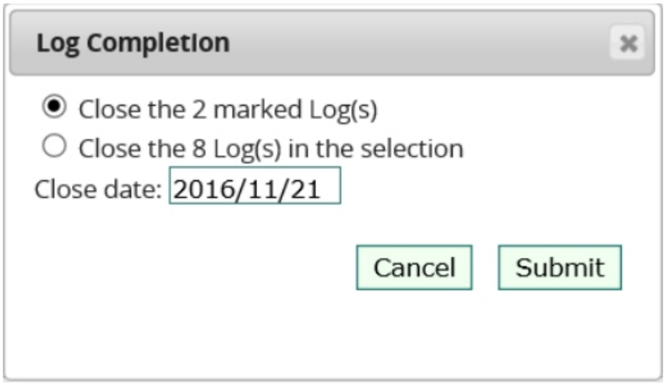
    b) If you are creating a new batch with marked Log(s), select Add Logs to new batch… and type the name of the new batch in the **Batch** field:

    The batch header will be created using the information in the first Log selected.

-  - The **Close Log** icon allows you to close multiple Logs from the list at the same time. This is particularly useful to clean up old Logs that are still open in the system.

    The **Log Completion** window allows you to choose your selection and manually enter a date for the **Close Date** field. If the Logs are very old, the **Close Date** should not be left as today's date but should be set to December 31st of the year the Logs were created to prevent these Logs from impacting your turnaround reports.



Click **Submit** to apply the **Close Date** to the selected Logs.

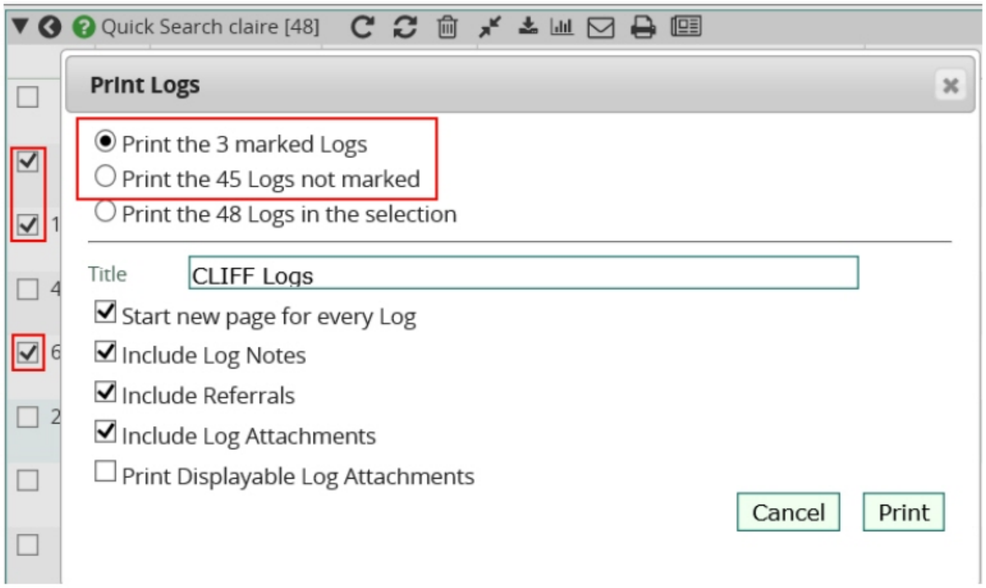
- - **Show Active Referrals for Logs** will change the list to display the Active Referral for each of the Logs on your list (unless the Log does not have an active Referral). This is an easy way to identify which office is currently working on the Logs in your list.

- - The **Statistics Report** icon displays the statics report menu. Details on running these reports is included in a later section of this guide.

- - Logs can be emailed form the list by clicking the **Email** icon. Details on using the CLIFF email function are included in a later section of this guide.

- - Clicking the **Print** icon will allow you to print the individual Referral slips for all the Logs in your list.

  If you select certain Logs before clicking the print icon, you will have the option to subset or omit those items from your print.



If you need to print any attachments on the Log, click the **Print Displayable Log Attachments.** This will print the contents of any attachments that can be read by the system (others may have to be opened and printing individually).

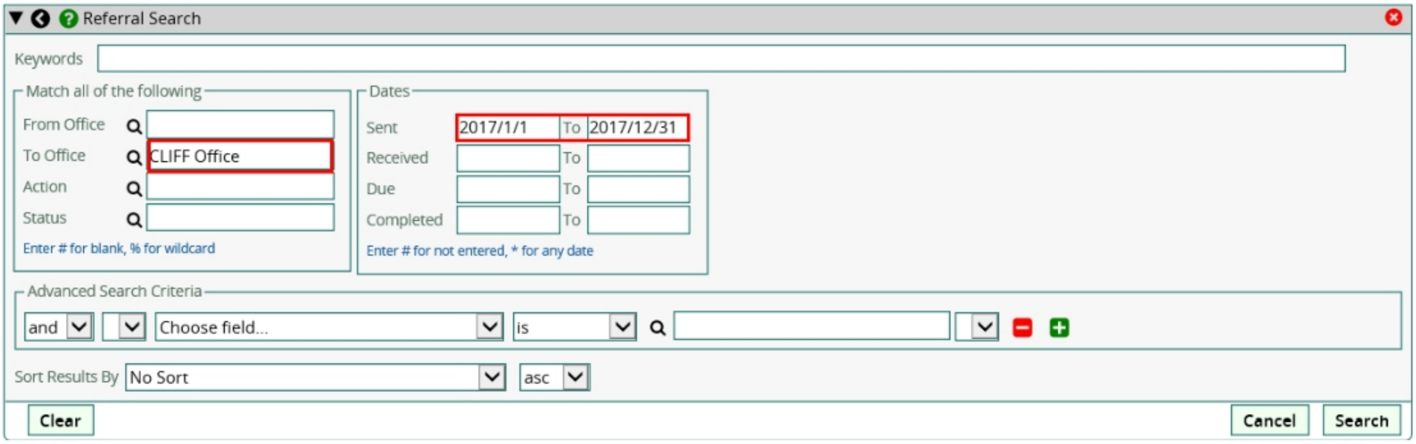
- - The **Custom Report** icon allows you to generate a list of data from your Logs. See the following section for more details.

Referral Search

Both the **Received** and **Sent** Referral menus provide the option to search Referrals.

The search window is the same for both searches, however, the **Received Referral Search** will display the **From Office** (who sent the Referral) whereas the **Sent Referral Search** results will display to the **To Office** (who received the Referral).

1. Click the **Search** icon from the **Received** or **Sent** menu
2. Enter your search criteria



For example, the search above would find all the Referrals sent to the CLIFF Office in 2017.

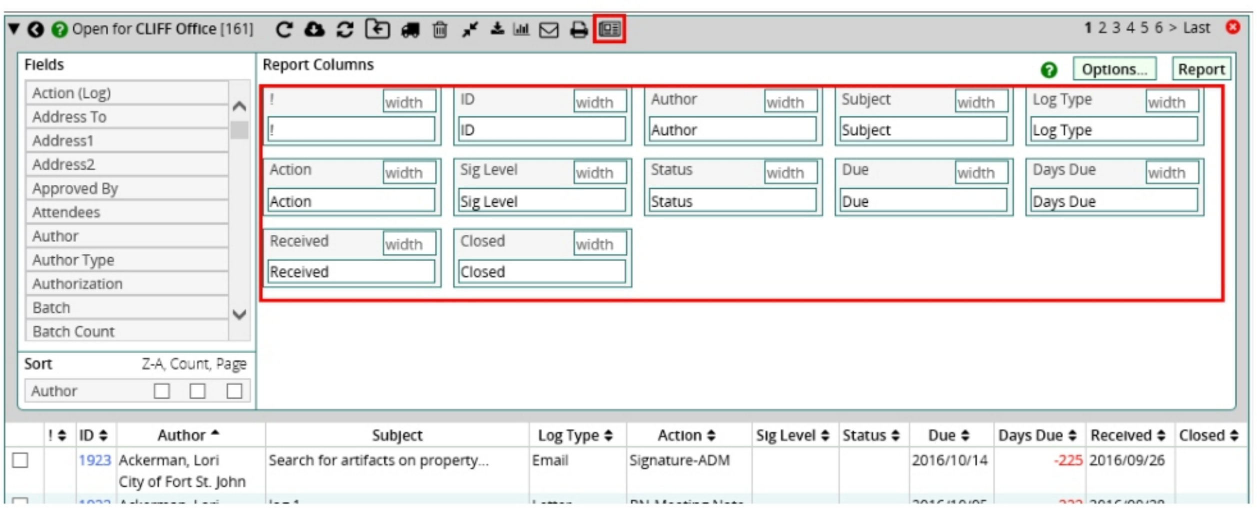
Creating a Custom Report

The **Custom Report** icon allows you select fields to include in a list-style report. You must have a list of Logs or Referrals on screen first.

1. From the top menu, click the **Custom Report** icon 
2. The **Custom Report** interface will appear above your list

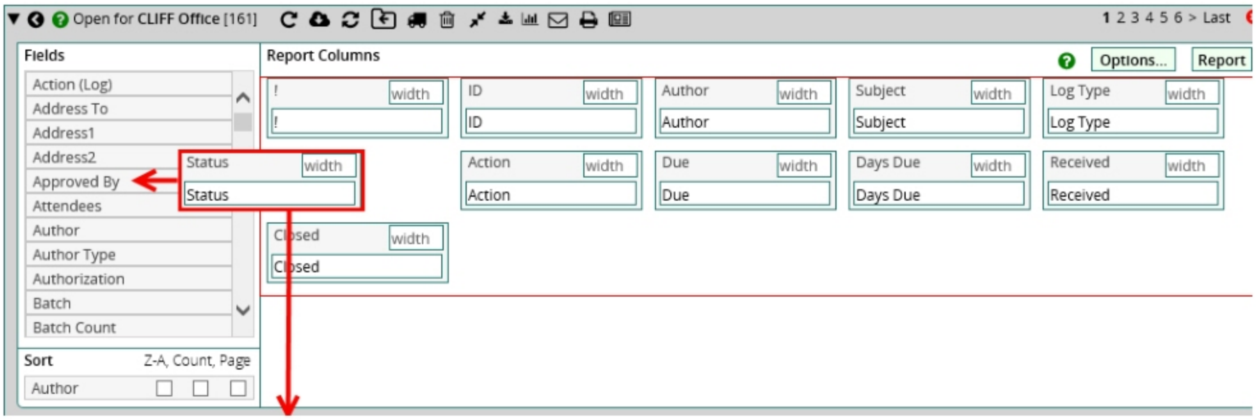
The interface for **Custom Reports** uses drag-and-drop functionality.

Fields are displayed in the order in which they will appear in the finished report.

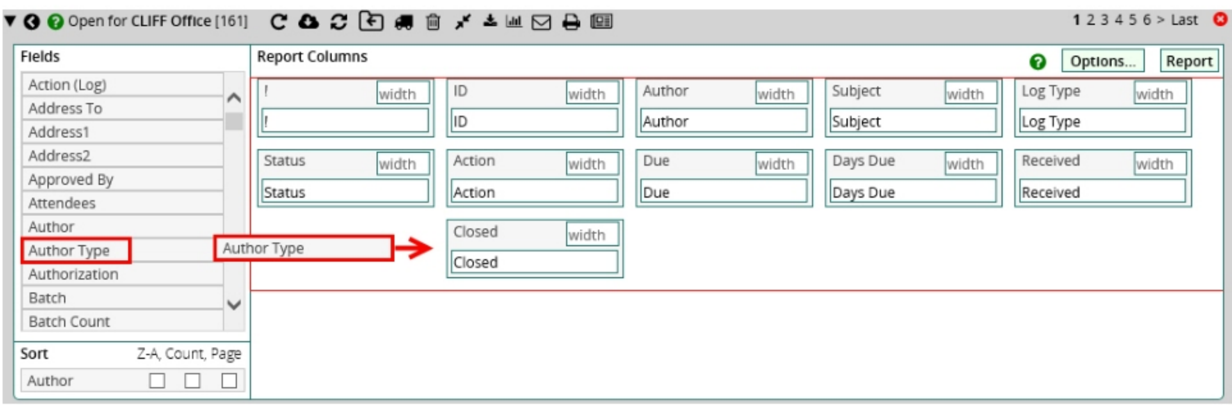


All field boxes can be dragged and dropped to change the order of the columns.

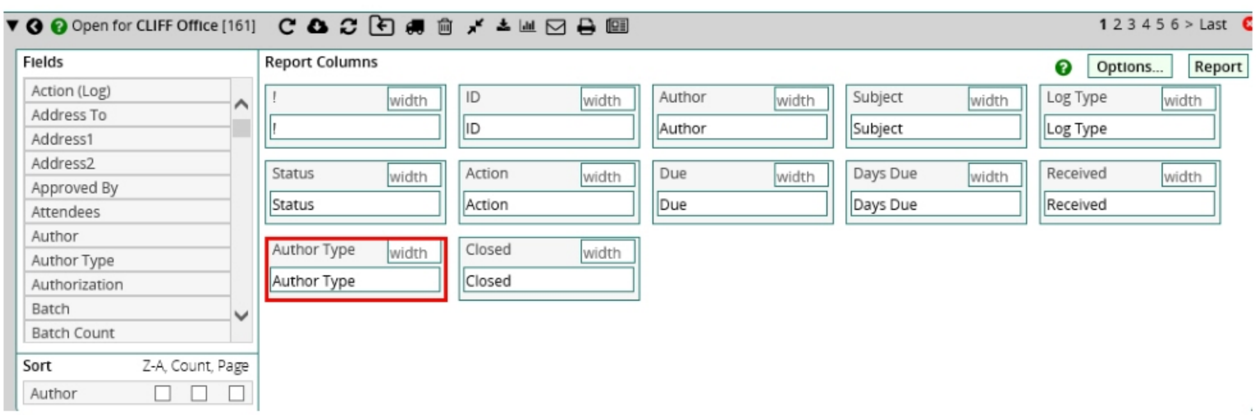
3. To remove fields, drag and drop the field boxes anywhere out of the **Report Columns** region



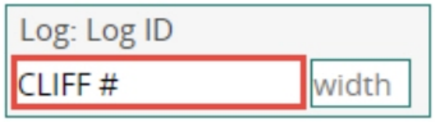
4. To add fields, drag and drop them from the list of available **Fields** on the left:



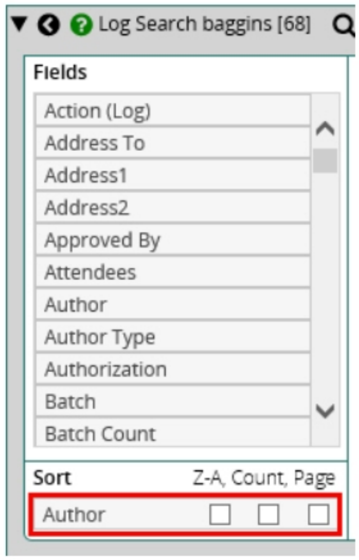
The new column will appear where it was dragged.



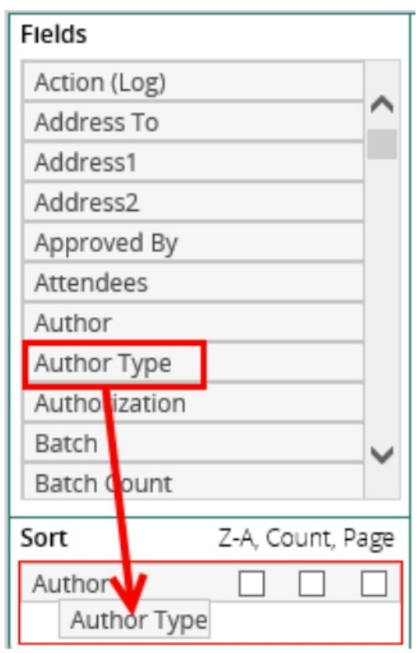
You can also relabel the column headers by changing the field name in the text box.



The **Sort** order will default to the sort order selected in your user preferences (if you do not have a **Sort** preference selected, it will default to **Log ID**).



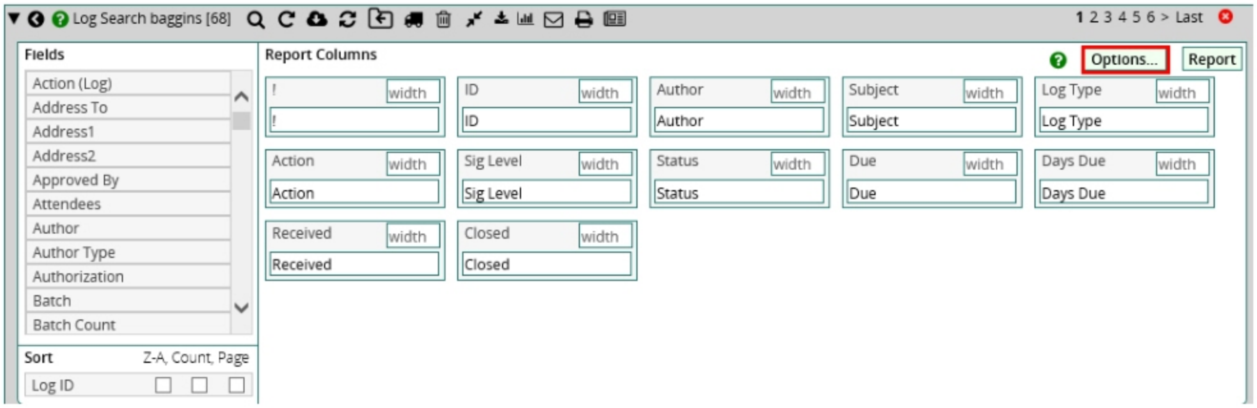
5. Additional or different sort orders are achieved by dragging and dropping fields from the list above into the desired sort order.



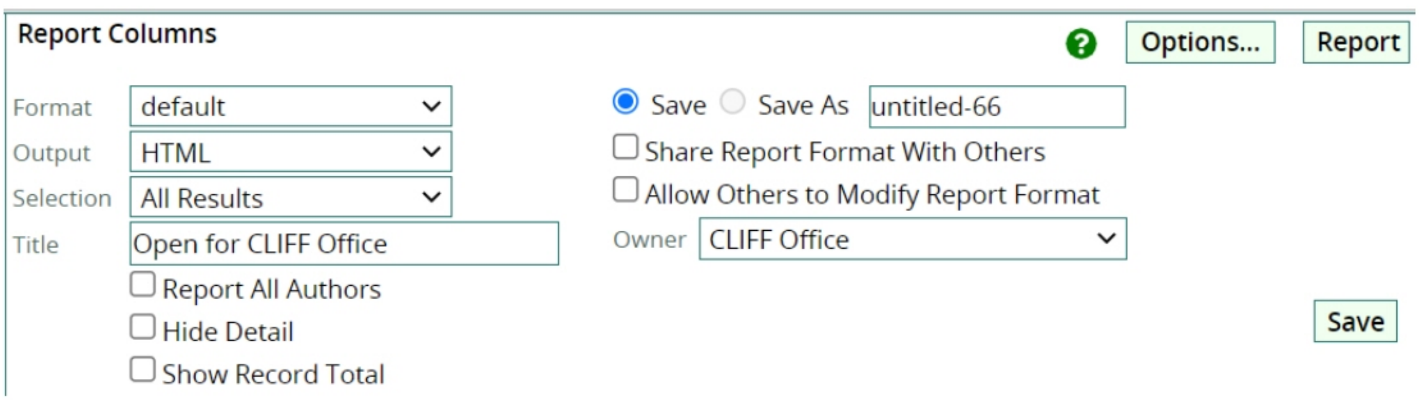
6. Sort fields are removed by dragging them out of the **Sort** region.

You can select a reverse sort order (**Z-A**) and **Count** for each different value in that field type or a **Page** break between different field values.

The **Options** button provides additional report functionality.



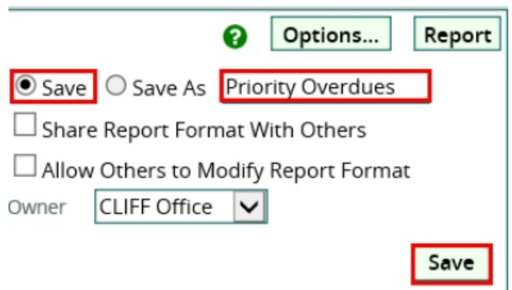
Reports can be saved or modified using the **Options** provided.



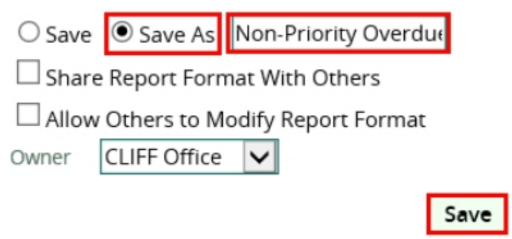
- **Format** – allows you to select a previously saved report format to apply to these search results (i.e. if you have a Custom Report saved for your open MLA letters, and you have done a different search but still want to use the same columns and sorts set up for the MLA report you could do your new search and then select MLA Letters as your **Format**)
- **Output** – this defaults to **HTML** (which means the completed report will open in a new tab in your browser) but can be set to **XLS** (to send the report directly to Excel) or **PDF/PDF Landscape** (to send the report directly to Adobe)
- **Selection** – if you marked (checked) certain Logs/Referrals in your search results, you can choose to limit your report to **Marked Records** or **Not Marked Records**. By default the report will include all items in your results list.
- **Title** – the Title displays at the top of your finished report and defaults to the type of search (i.e. Log Search, Open Logs, Active Referrals, etc) and any other key criteria (i.e. keyword). You can modify the Title as required.

- **Report All Authors** – if there is more than one author in the Log, the report will display all names captured in the Log Author fields in the row
- **Hide Detail** – hides the details of the items in your report
- **Show Record Total** – includes a grand total of all the items in your report
- **Save/Save As** – allows you to save the report search and format to use again

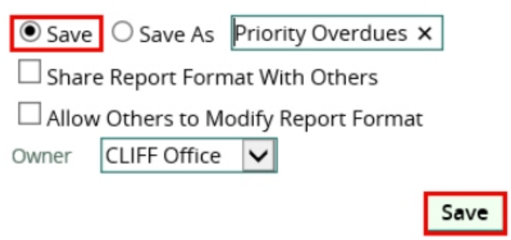
  - To save a new report, ensure the **Save** toggle is selected, enter a name and then click **Save**



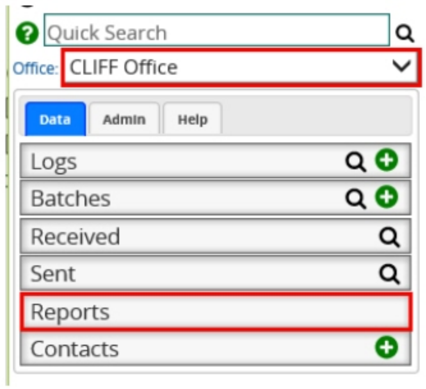
  - To save a different version of an existing report, toggle the **Save As**, update the name and then click **Save**



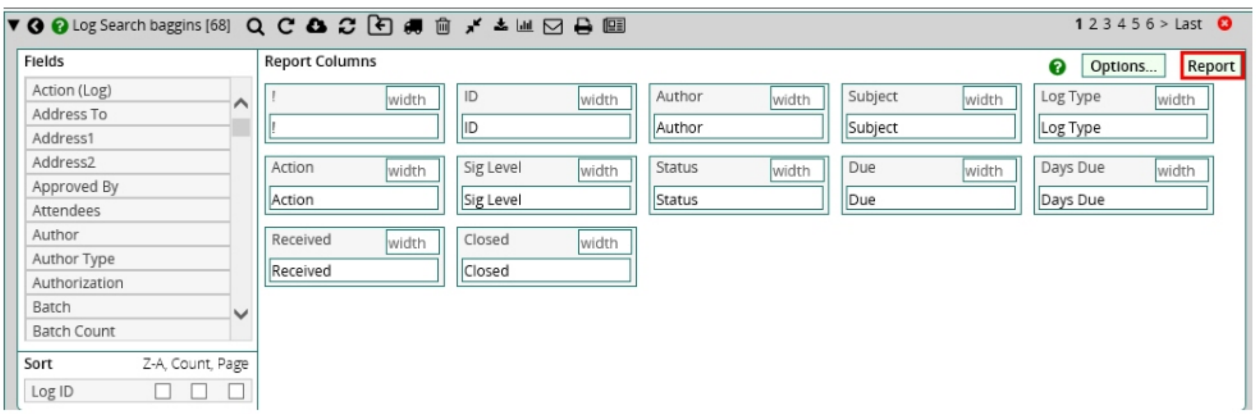
  - To save changes to an existing report, update the fields, sorts, etc., ensure the **Save** toggle is selected and click **Save**



- **Share Report Format With Others** – by default, only users in the owner's office can view and use a saved report. If the **Share Report Format With Others** checkbox is selected, all users will see the report on their **Report** menu
- **Allow Others to Modify Report Format** - by default, only users in the owner's office can update a saved report. If the **Allow Others to Modify Report Format** checkbox is selected, all users can modify the report format
- **Owner** – the office that owns the report. To view the report, you must have this office selected as your current **Office** and then click the **Reports** menu



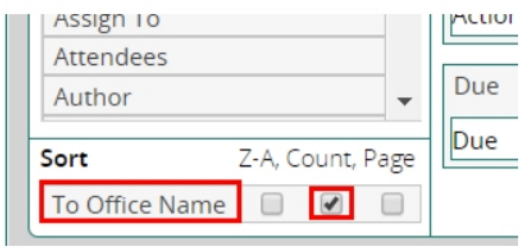
7. Click the **Report** button to generate the report



8. Use the browser or Excel functions to save or print the report

Note that when you select **To Office Name** as your primary **Sort** in **Custom Reports** and select the **Count** checkbox, CLIFF includes the number of **Referrals Overdue** and the **Average # of Days Overdue** in the completed report.

1. Drag and drop **To Office Name** into the **Sort** region and ensure it is the primary sort (first one in the list).
2. Click the **Count** checkbox



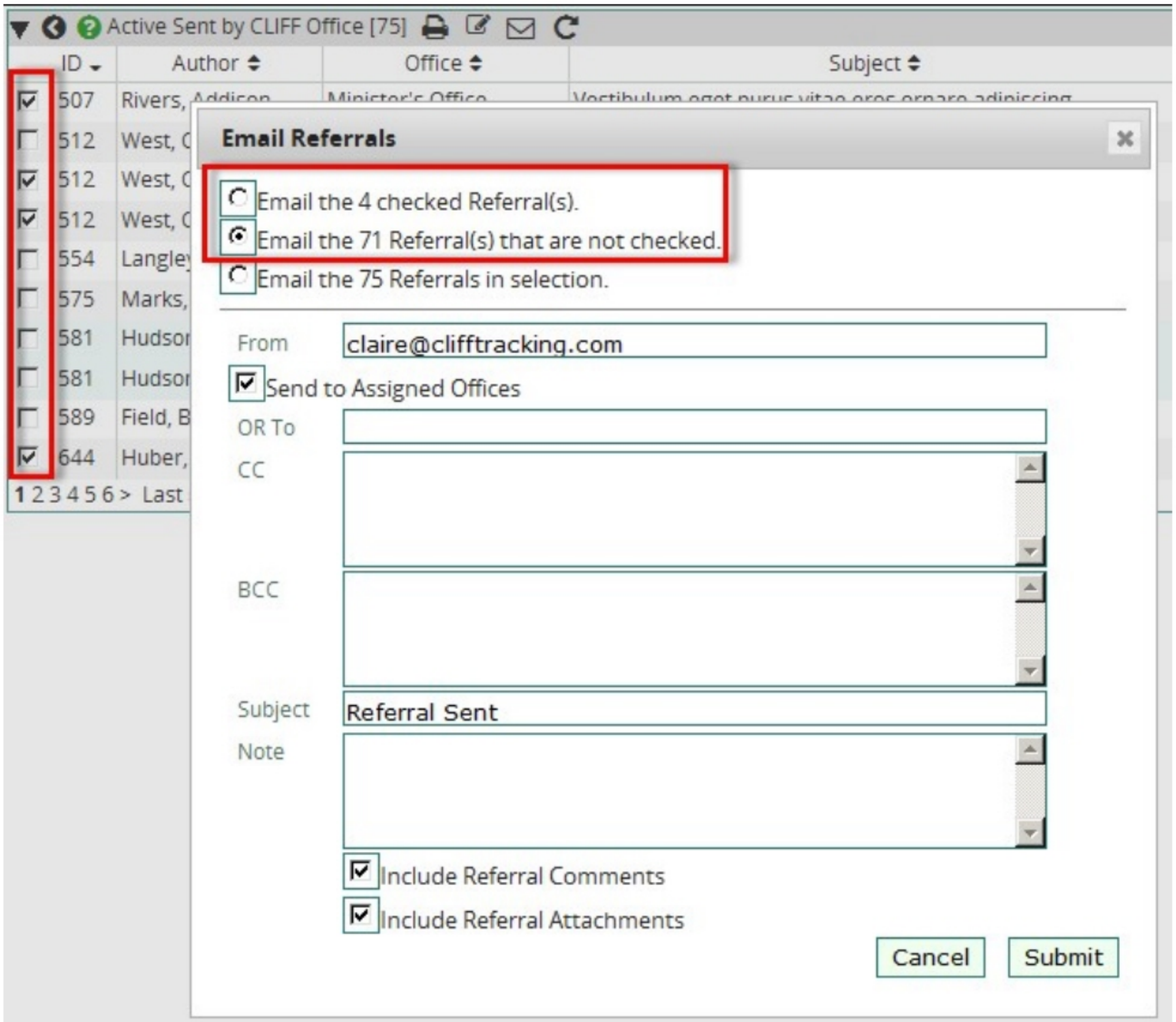
The completed report displays the total number of Referrals due to the office on the left and the total number of overdues along with the average number of days overdue on the right.

Emailing Referrals/Logs

When emailing from a list of Referrals or Logs, there are a number of options available.

Selecting/Deselecting Referrals

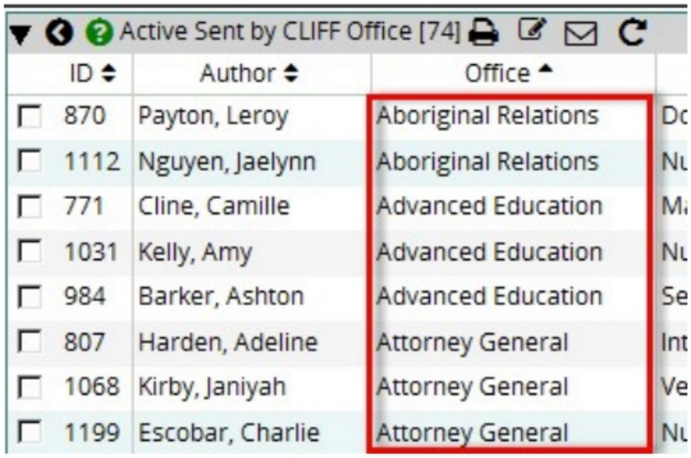
Logs or Referrals can be omitted or subset from the list by using the checkboxes beside the Log IDs in the list. When you click the **Email** icon at the top of the list, you will have the option to omit (exclude) or subset (limit) the items to be included in the email:



Choosing the Receiving Office

When sending from a list of Referrals, you have a choice to send the entire list to a specific email address (with any cc's required) by *deselecting* the **Send to Assigned Offices** checkbox and by typing in an email address in the **OR To** field. When emailing a list of Logs, the email addresses must by selected or manually entered.

If you do leave **Send to Assigned Offices** checkbox selected, CLIFF will email the contact(s) for the office that is displayed in the email list. For example, for this list of Referrals:



Leaving the **Send to Assigned Offices** checkbox selected would mean that:

- The contact for Aboriginal Relations would receive an email containing a summary of Logs **870** and **1112**
- The contact for Advanced Education would receive an email containing a summary of Logs **771**, **1031**, and **984**
- The contact for Attorney General would receive an email containing a summary of Logs **1068** and **1199**

NOTE: CLIFF can only email the contact for the office if there is an email address assigned to the CLIFF office. You can check to see if they have a contact set up by opening a Log referred to that office to see if there is an email icon attached to their open Referral:

In this example, both Finance and Advanced Education have an email contact, but the CLIFF Office does not.

Viewing the Email

CLIFF will send a summary of each Referral in the email. If you are sending multiple Referrals to the same office at the same time, they will all be included in the same email:

Thu 2015-03-12 5:21 PM

CLIFF <cliff.ops@gov.bc.ca>

Outstanding Referrals

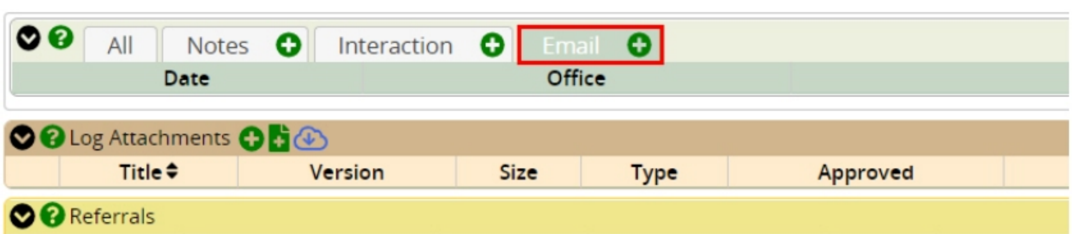
To claire@clifftracking.com

Referral is Active and overdue by 3 days							
Log ID:	1342	Received:	2015/03/03	Log Due:	2015/03/12	Log Action:	Advice
Author:	Claire McCutcheon, Training, Aktiv Software						
Subject:							
From:	CLIFF Office	Sent:	2015/03/03	Status:	Pending	Ref Action:	Approve
To:	Deputy Minister's Office	Received:		Reason:		Subaction:	
Assign To:		Completed:		Due:	2015/03/06	File No.:	

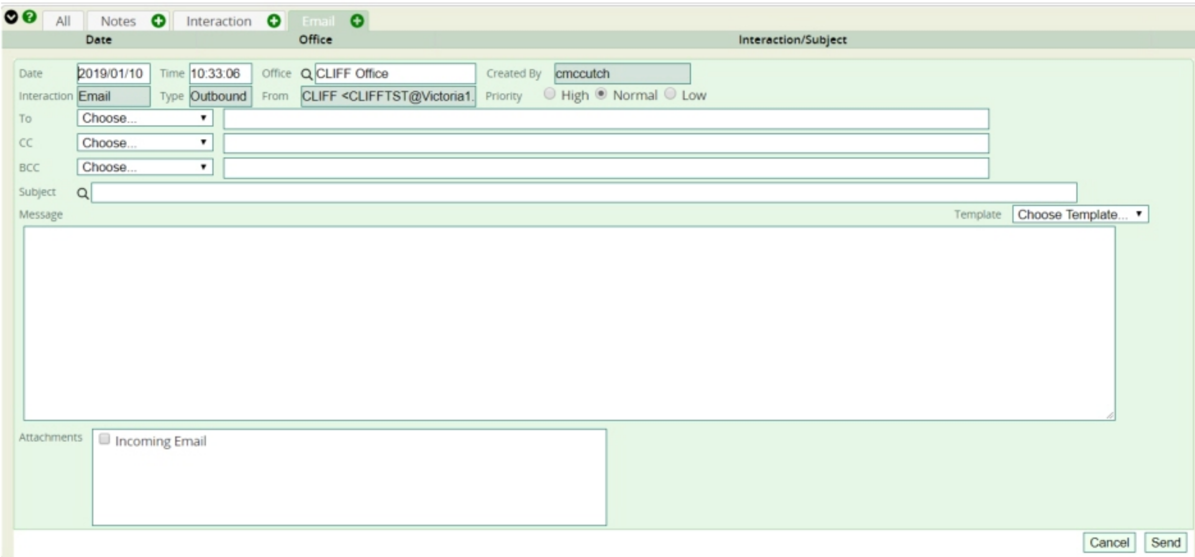
Referral is Active and overdue by 2 days							
Log ID:	1346	Received:	2015/03/05	Log Due:	2015/03/25	Log Action:	Reply Direct
Author:	Claire McCutcheon, Training, Aktiv Software						
Subject:	training						
From:	CLIFF Office	Sent:	2015/03/05	Status:	Pending	Ref Action:	Signature
To:	Deputy Minister's Office	Received:		Reason:		Subaction:	
Assign To:		Completed:		Due:	2015/03/10	File No.:	

External Email

Additional email functionality may be made available by your organization to allow users to send emails from an Email region in CLIFF.



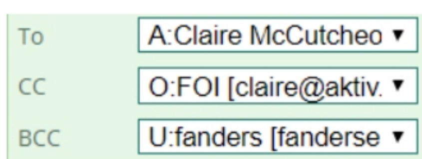
1. Click the **Add** button to create a new email



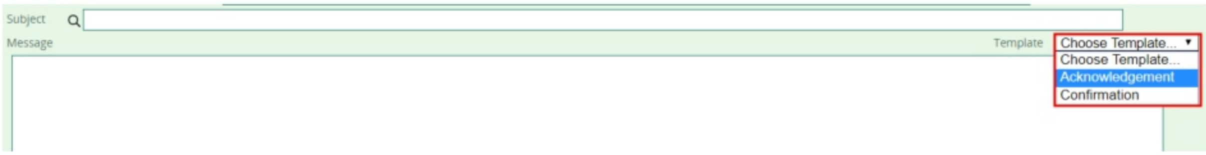
2. **Date**, **Time**, sending **Office** and **Priority** can all be modified

3. The **To**, **CC** and **BCC** email addresses can be selected from the list of values which includes the email address(es) of the Log author(s) and all the email addresses stored for users and offices within CLIFF. In addition, users can manually enter any email address. ***This provides the flexibility to easily email internal staff regarding the assignment, or to use the functionality to communicate easily with the author of the incoming correspondence.***

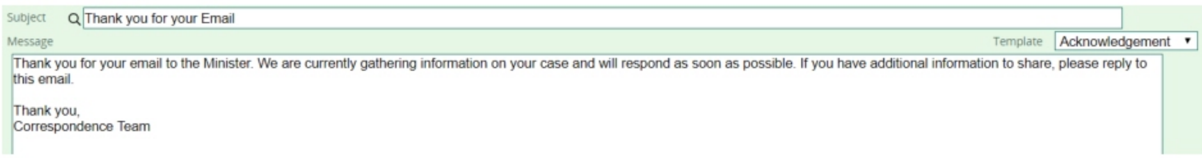
4. Email addresses preceded with an **A** belong to the Log author(s), **O** belong to the CLIFF Offices and **U** to individual Users



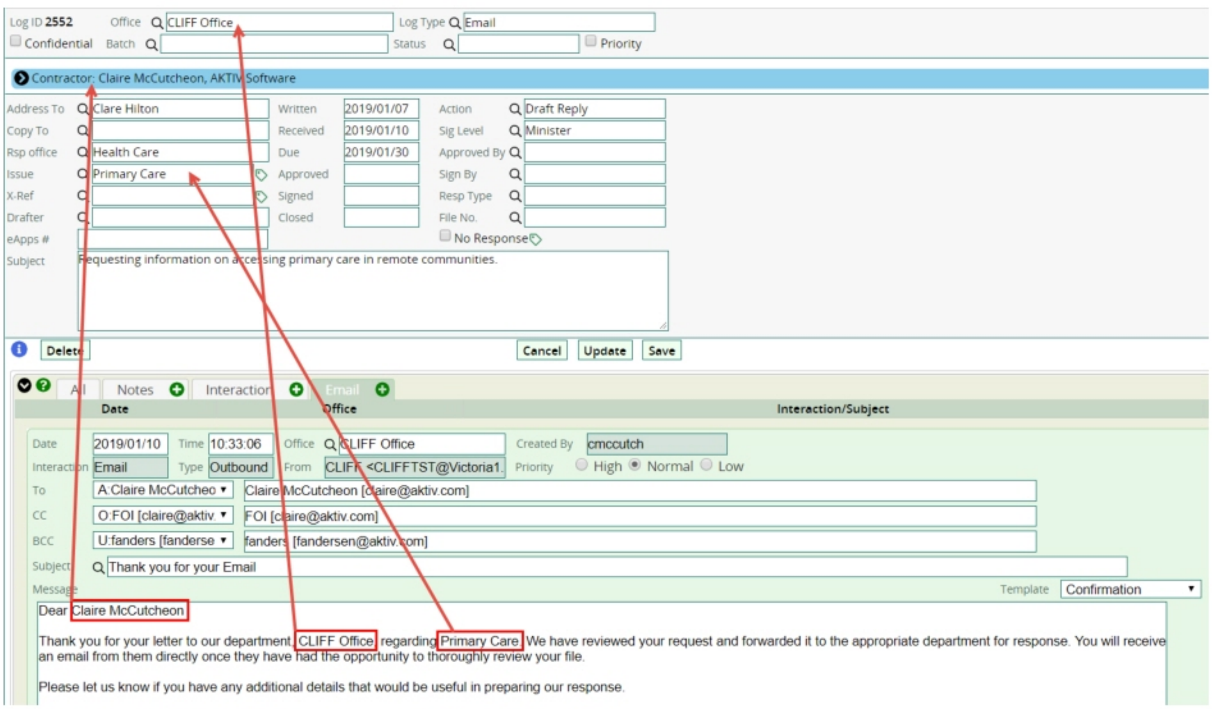
5. Users may manually enter a **Subject** and **Message** for the email or select a **Template** response



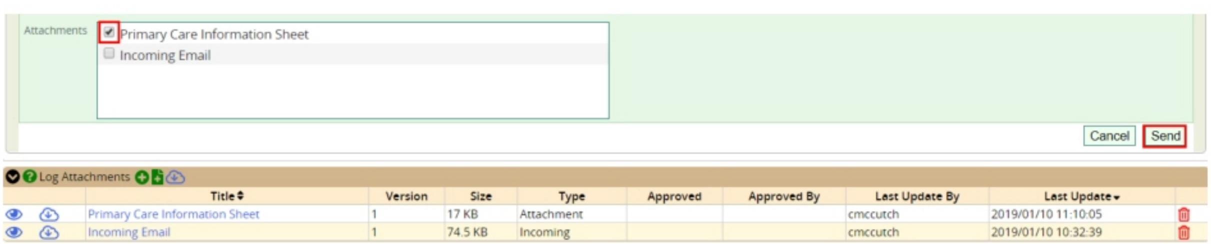
6. **Templates** can be created as simple text responses



7. Or **Templates** can have data from the Log fields inserted into the email



8. If there are **Attachments** saved to the CLIFF Log, these may be added as attachments to the email by selecting the checkmark beside the relevant document(s)



9. Once the email is complete, click the **Send** button. The **Email** region is updated with a summary of the sent message. Click the **Date** hyperlink to open and view the entire email.

All | Notes | Interaction | Email

Date	Office	Interaction/Subject		
2019/01/10	CLIFF Office	Outbound	To: claire@aktiv.com	Sent
		Receipt of email confirmed		

When the email is received, the **Subject** line is tagged with the CLIFF **Log ID**

CLIFF <CLIFFTST@Victoria1.gov.bc.ca> claire@aktiv.com 1 11:14 AM

CLIFF 2552:Receipt of email confirmed

Primary_Care_Information_Sheet.docx
17 KB

Dear Claire McCutcheon

Thank you for your letter to our department, CLIFF Office, regarding Primary Care. We have reviewed your request and forwarded it to the appropriate department for response. You will receive an email from them directly once they have had the opportunity to thoroughly review your file.

Please let us know if you have any additional details that would be useful in preparing our response.

Sincerely,
Manager

- If a reply is sent, or a new email generated and sent to CLIFF, if the **Subject** line contains a CLIFF **Log ID**, CLIFF will automatically attach the email to the correct Log and send a notification email to the owner of the Log

- If there is no **Log ID** in the incoming email, CLIFF will use a hidden **Message ID** in the email header and see if it matches the **Message ID** for any emails sent by CLIFF. If a match is found, the email is stored with that Log.

- If no **Log ID** or **Message ID** can be found, the Log is kept in the **Log From Email** region until an Administrator assigns it to the correct Log.

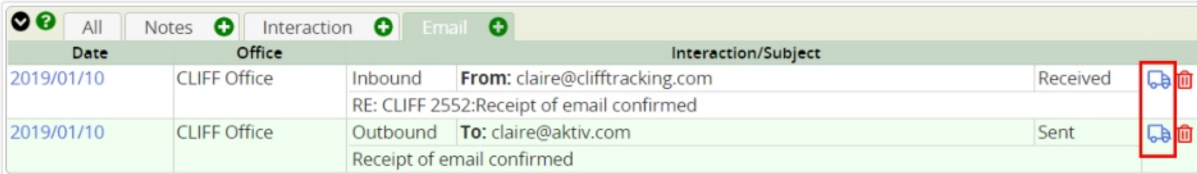
- Once the email is received by CLIFF it is displayed in the **Email** list as an **Inbound** email

All | Notes | Interaction | Email

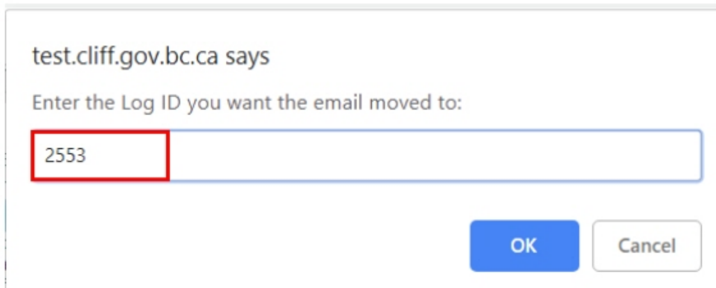
Date	Type	Office	About
2019/01/10	Email	CLIFF Office	Inbound - RE: CLIFF 2552:Receipt of email confirmed
2019/01/10	Email	CLIFF Office	Outbound - Receipt of email confirmed

Moving Emails to Another Log

1. If an email needs to be moved to a different CLIFF Log, click the **Move Logs** icon



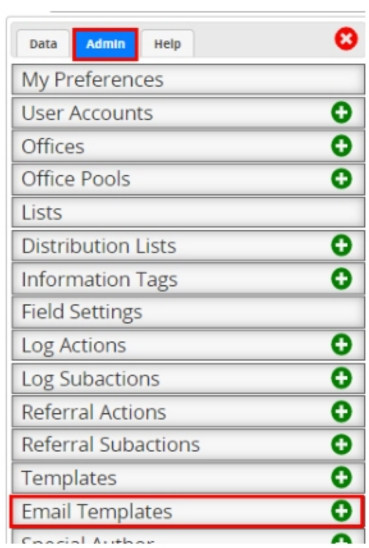
2. Enter the new **Log ID** in the **Move Logs** window to move the email



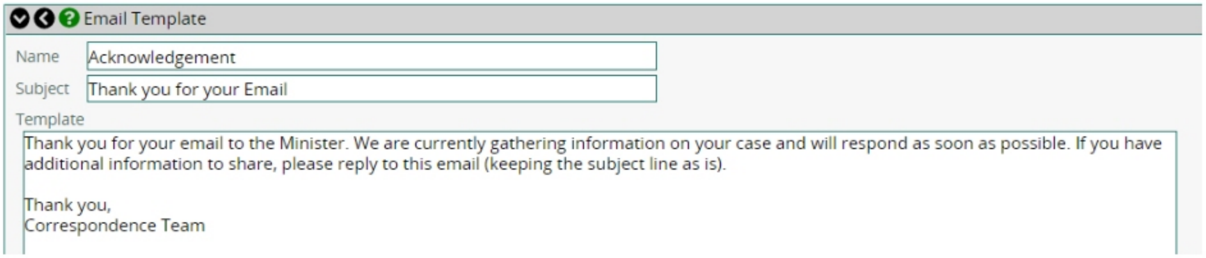
Email Templates

CLIFF Administrators can create templates for the new email functionality shown above.

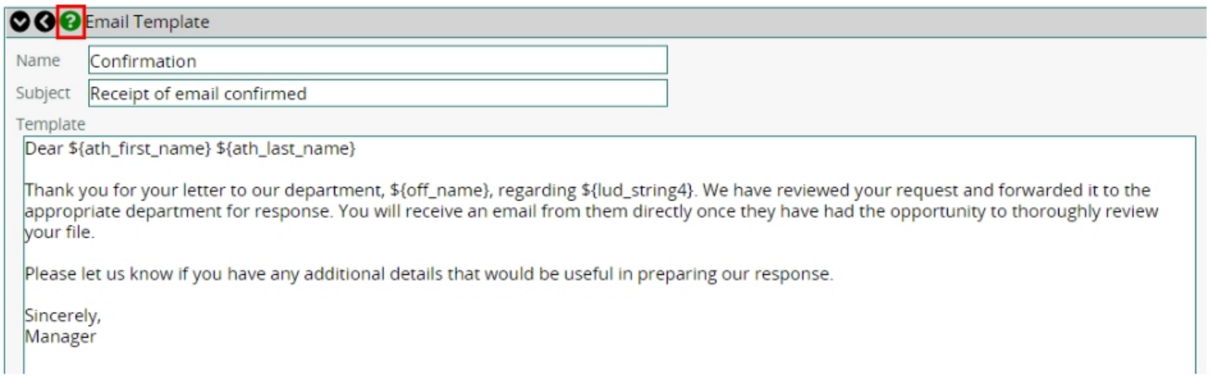
1. From the **Admin** menu click **Email Templates** to view/update existing templates or click the **Add** button to create a new template



2. To create a simple text template, enter the information and save



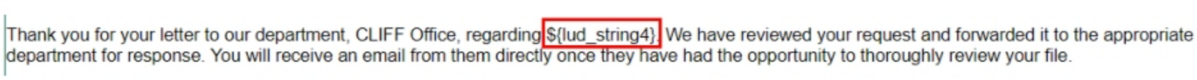
3. To create a template that includes data from the Log fields (known as **Field Tags**) enter the text as shown below



4. Click the **Show Help** icon to view a list of all **Field Tags** available (only a sample is shown below)

- **${id}** - Log ID
- **${date_received}** - Received
- **${date_written}** - Written
- **${date_due}** - Due
- **${date_closed}** - Closed
- **${date_created}** - Date Created
- **${user_name}** - Entered By
- **${confidential}** - Confidential
- **${batch}** - Batch
- **${batch_type}** - Batch Type
- **${batch_lock}** - Batch Lock
- **${batch_count}** - Batch Count
- **${type}** - Log Type
- **${action}** - Action

5. Note that if your template contains a **Field Tag** and there is no data in that field, the email content will need to be manually corrected, or the email can be regenerated after the field has been populated and the Log updated.

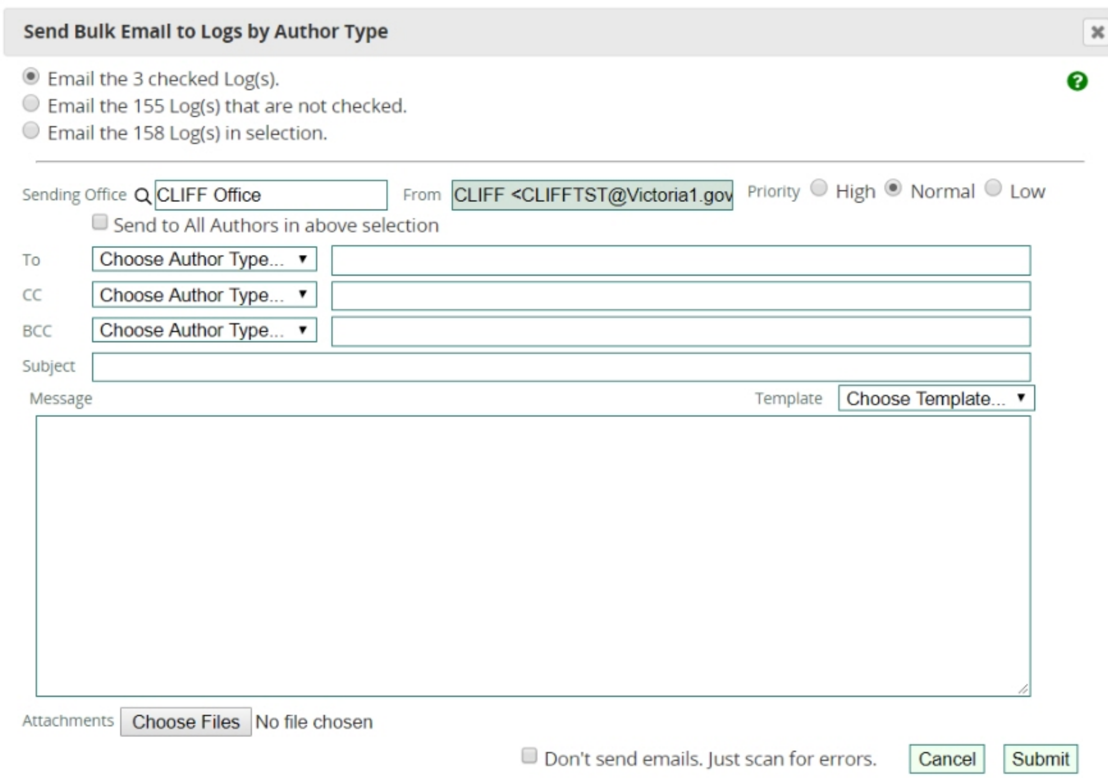


Bulk Email

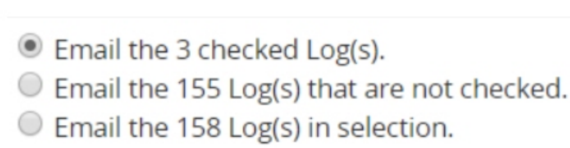
If the same email message needs to be sent for multiple people, the **Bulk Email** functionality allows you to send the same message to a list of authors from a list of Logs.

1. Once the correct list of Logs is displayed, click the **Bulk Email** icon (note this icon will only be displayed for users granted access through their **User Account**)

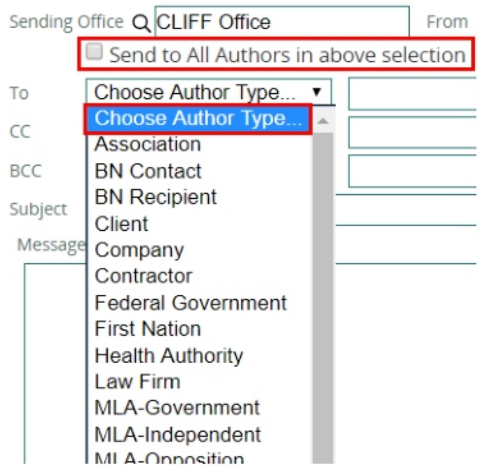
2. The **Send Bulk Email** window uses a similar format as shown above for emails sent from within a Log with some additional functionality



3. Emails can be sent to the authors of all Logs on the list or a selected group

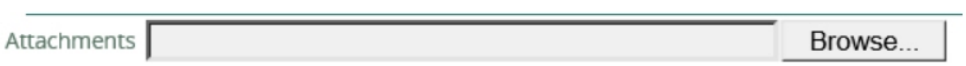


4. Emails can be targeted to specific **Author Types** or sent to all authors on the list



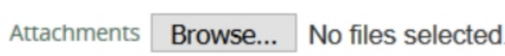
5. **Attachments** to the emails can be selected from any saved location

From IE:



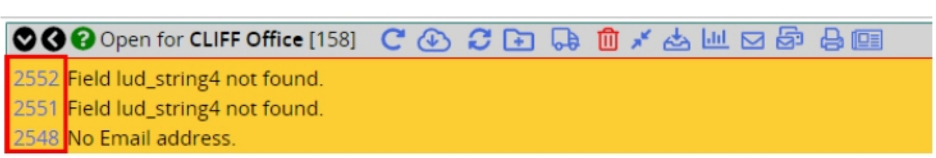
From Chrome:

From Firefox:



6. A scan can be run before the emails are sent to ensure that all Logs have email addresses and that the correct Log fields are populated if you are using a **Template** with **Field Tags**. Click the checkbox and click the **Submit** button to initiate the scan.

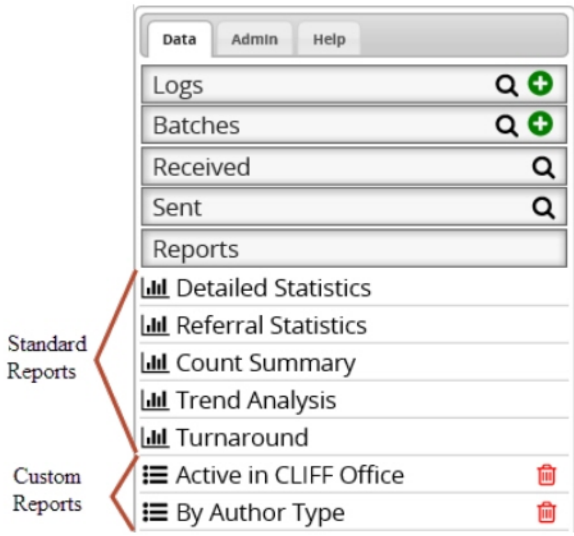
7. If any errors are found by the scan, they are listed in the main CLIFF window



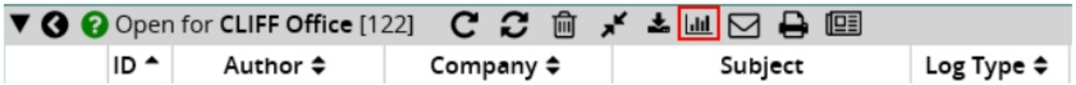
8. Click the hyperlinked **CLIFF IDs** to update the Logs and then click the **Bulk Email** icon again to regenerate the window and send the email

Reports

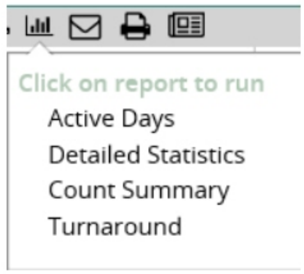
Reports are available from the **Report** menu and will display listed above any custom reports. Selecting one of the built-in reports from this list will require you to use one of the standard searches included in the report format.



To run one of the reports from a specific list of search results, use the **Statistics Reports** icon in the menu above your results list.



When the **Statistics Reports** icon is clicked, a menu of the available reports is displayed.



Active Days Report

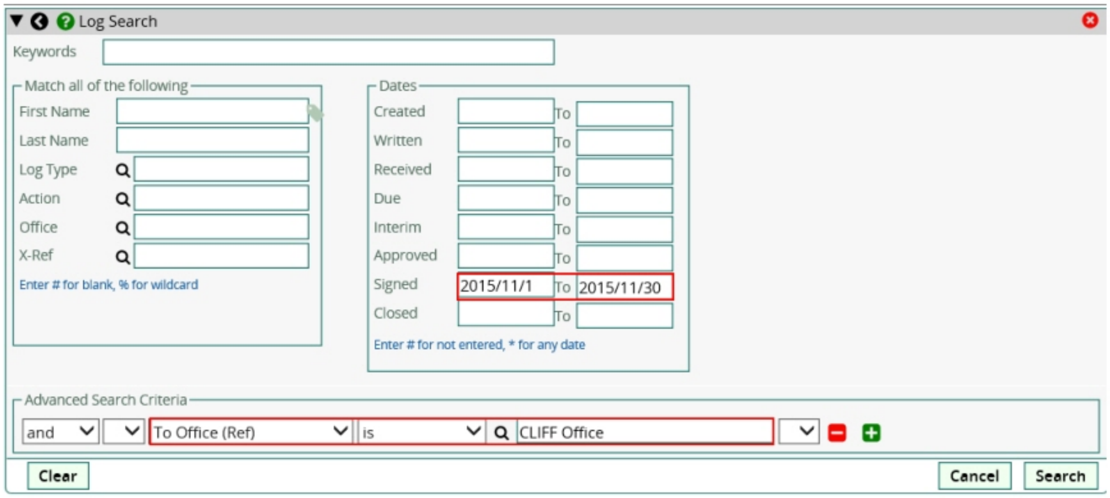
The **Active Days** report is the only report that is not also available from the **Reports** menu (i.e. it can only be run from a search). The **Active Days** report is run from a list of Logs and calculates the number of active days (the number of days the Referral was in a **State** of **Active**) for every Referral in the selection. For example, if one Log in the selection included 6 Referrals, CLIFF would report on the **Active** column for each one of those Referrals.

Running the Active Days Report

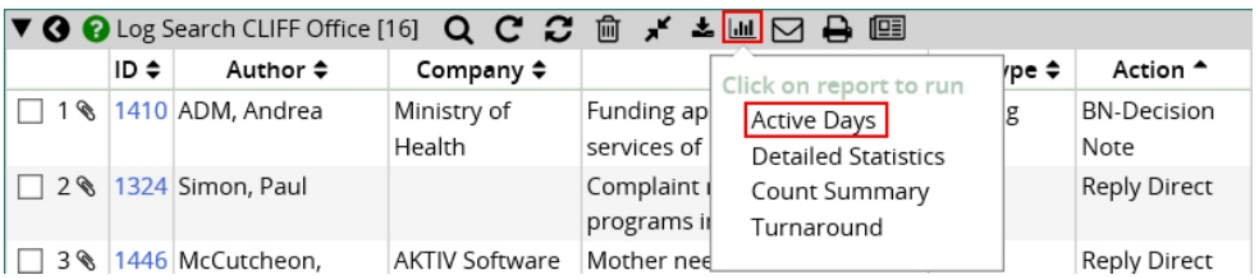
1. Search for a group of Logs with **Log Search**

Although the report can be run on open Logs with a combination of active, pending and completed Referrals, for reporting consistency we recommend reporting on closed Logs to ensure that all the Referrals in the selection have been completed.

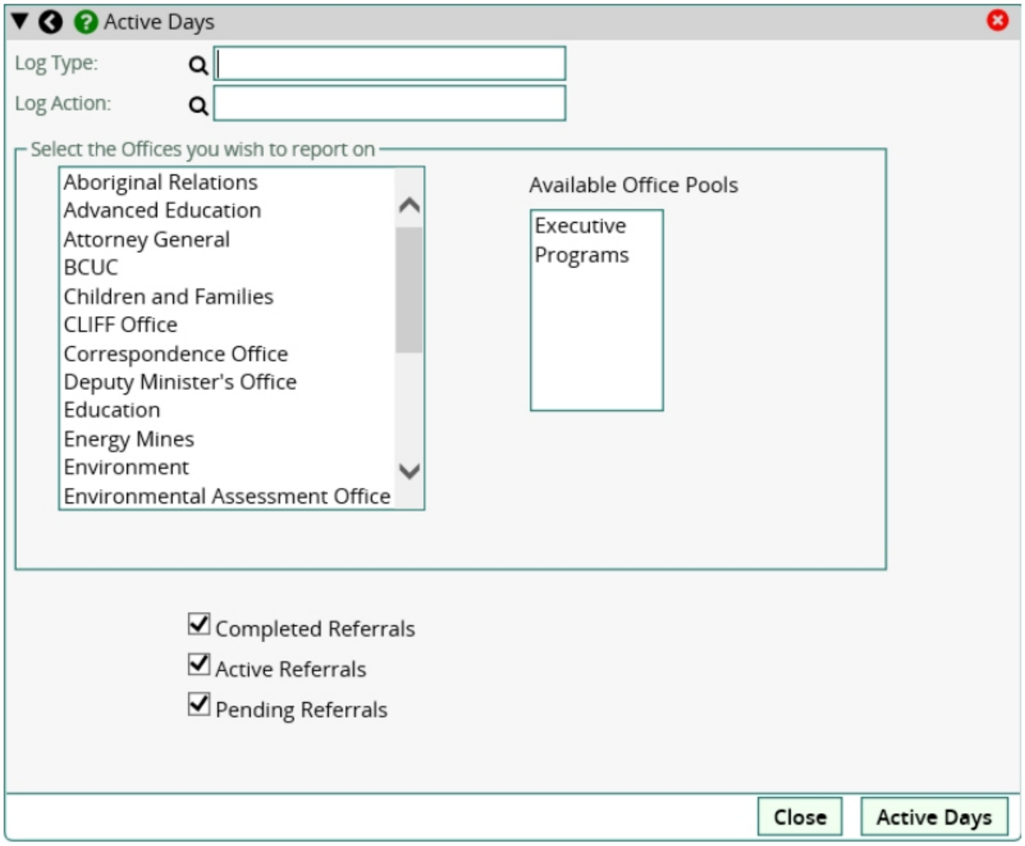
The example below will search for all Logs referred to one office that were signed last month.



2. From the **Statistics Report** icon, select **Active Days**



3. Enter any additional parameters in the **Active Days** window as required



- Leaving the default settings will include all Referrals contained in the selection of Logs
- Adding a **Log Type** or **Log Action** will limit the report to the Referrals in Logs with those values
- Selecting an **Office** from the list will only include Referrals to that office. Holding down the control key will allow you to select multiple offices at once. If all the offices are in a particular division, they may be identified as an **Office Pool**. Click an **Office Pool** name to see the list of offices that will be included in the report.
- If your initial Log search included open Logs, you may have Referrals in your selection that are still open. You can limit your report to Referrals that are **Completed** or open (**Active** and/or **Pending**) by using the checkboxes.

4. Click the **Active Days** button to generate the report

Demo Data
Active Days Report

Log ID	To Office	Action	Sent	Due	Completed	State	Times Active	Days Active
1260	CLIFF Office	Draft-Minister	2015/01/22		2015/01/22		0	<1
1260	Deputy Minister's Office	File	2015/01/22		2015/01/22		0	5
1322	Minister's Office	Approve	2015/02/19	2015/02/24	2015/09/11		1	4
1322	CLIFF Office	Reply	2015/02/19	2015/03/11	2015/02/19		1	15
1322	CLIFF Office	Reply	2015/02/19	2015/03/11	2015/09/11		1	20
1323	Minister's Office	Approve	2015/02/19	2015/02/24	2015/02/19		1	1
1323	CLIFF Office	Approve	2015/02/19	2015/02/24	2015/02/19		1	9

The report lists each Referral by **Log ID**, **To Office**, **Action**, **Dates**, **State** (**Active** or **Pending** if the Referral is still open), **Times Active** (how many times did it come back to that office) and then the **Days Active**
*As an example, in the report above, we can see that Log ID **1260** has 2 completed Referrals. The assignment spent less than one day in the CLIFF Office and 5 days in the Deputy Minister's Office.*

5. Use your browser's tools to print the report or the report can be copied and pasted into another application (such as Word or Excel)

Detailed Statistics Report

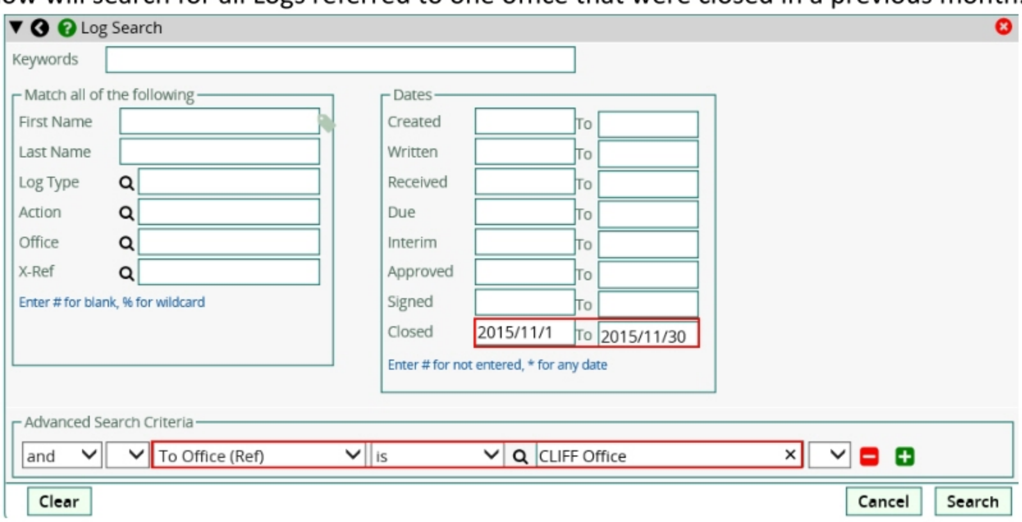
The **Detailed Statistics** report calculates statistics for **Logs**, **Referrals Received** or **Referrals Sent**. The report can be run from the **Reports** menu or from a list of search results.

Running the Detailed Statistics Report for Logs

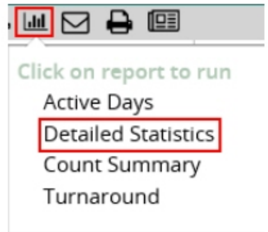
1. Open the **Detailed Statistics** report from the **Report** menu or search for a group of Logs with **Log Search**

*We recommend using **Log Search** before running the report for Logs to allow the user to report on closed or signed Logs or to limit the selection to Logs referred to a certain office.*

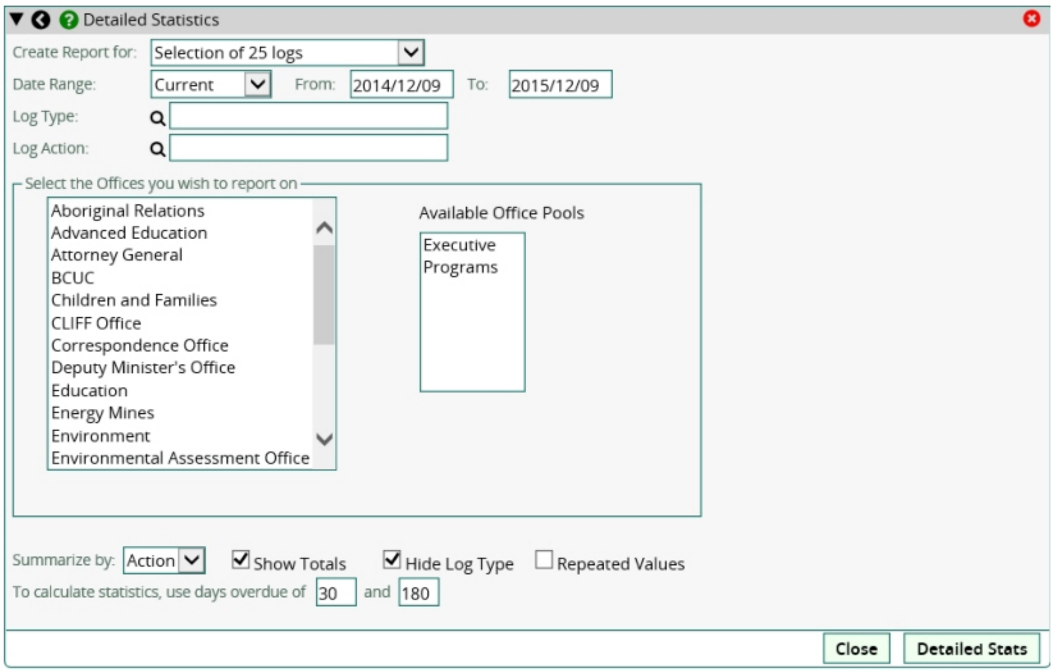
The example below will search for all Logs referred to one office that were closed in a previous month.



2. If you are running the report from a list of search results, from the **Statistics Report** icon, select **Detailed Statistics**



3. Enter any additional parameters in the **Detailed Statistics** window as required



- If you ran the report from a list, the **Create Report for** field will default to **Selection of # Logs**. If you are running the report from the **Report** menu, it will default to **Logs**. If you want to run the report on all the Referrals in the selection of Logs, select **Selection of Referrals from # Logs** from the drop-down menu.
- Adding a **Log Type** or **Log Action** will limit the report to the Logs with those values
- Selecting an **Office** from the list will only include Logs created by that office. Holding down the control key will allow you to select multiple offices at once. If all the offices are in a particular division, they may be identified as an **Office Pool**. Click an **Office Pool** name to see the list of offices that will be included in the report.
- The report can be summarized by **Action**, **Type** or **Office**
- Checkboxes allow users to **Show Totals**, **Hide Log Type** or hide **Repeated Values**
- The report sorts overdue Logs into columns indicating how seriously overdue the Log is based on the defaults of **30** days and **180** days overdue. These can be manually updated as required.

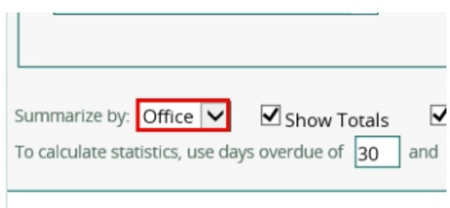
4. Click the **Detailed Stat** button to generate the report

Detailed Statistics Report

Logs for the period 9 December 2013 to 9 December 2015

Logging Office	Log Action	Logs Enter	Logs Closed	Logs Open	0-30 Late	31-180	>180 Late	Avg Days to Close
MO-Minister's Office	Additional	2	2	0	0	0	0	50.5
	Bullets-MLA	63	63	0	0	0	0	6.8
	Draft-ADM's Sig	2	2	0	0	0	0	22.5
	Draft-DM's Sig	1	1	0	0	0	0	21.0
	Draft-Minister's Sig	4	5	0	0	0	0	51.6
	Draft-Minister's Sig-MLA	1	1	0	0	0	0	94.0
	Draft-Other	1	1	0	0	0	0	11.0
	File	35	35	0	0	0	0	32.9
	FYI	147	147	0	0	0	0	89.0
	Meeting	1	1	0	0	0	0	9.0
	Necessary Action	6	6	0	0	0	0	38.0
	Phone Call	17	17	0	0	0	0	11.7
	Redirect-File	27	27	0	0	0	0	31.9
	Redirect	3	3	0	0	0	0	8.7
	Reply Direct	25	25	0	0	0	0	16.9
	Reply Direct-ADM's Sig	35	35	0	0	0	0	44.1
MO-Minister's Office		**370**	**371**	**0**	**0**	**0**	**0**	**33.2**
Grand Total		**370**	**371**	**0**	**0**	**0**	**0**	**33.2**

- The title of the report includes the date range of the Logs in your selection based on the **Date Created**
- The report lists each Log by **Logging Office**, **Log Action**, how many **Logs Enter**(ed) during the reporting period, how many **Logs Closed** during the reporting period, how many Logs were still open and, of those that are still open, how late are they (less than **30** days, between **31-180** days or over **180** days), and the average number of **Days to Close** (from Date Received to Date Closed)
- The report provides sub-totals by office and a **Grand Total** at the end of the report
- To remove the sub-sort by **Log Action**, choose to **Summarize by Office** in your parameters



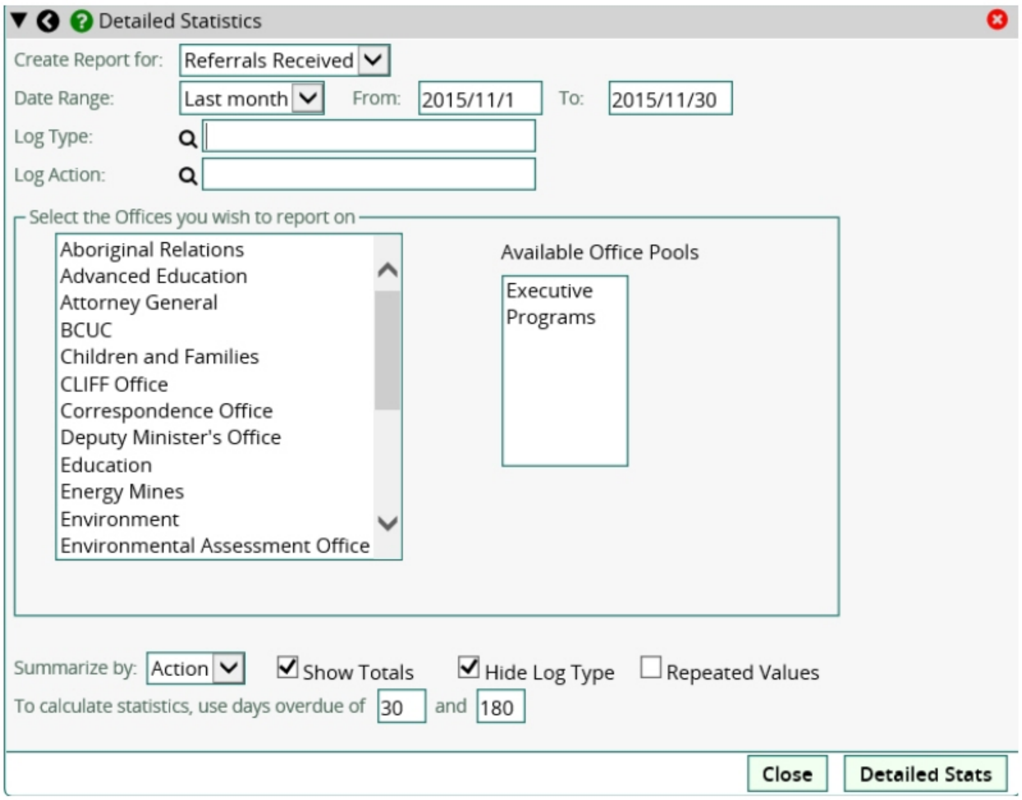
5. Use your browser's tools to print the report or the report can be copied and pasted into another application (such as Word or Excel)

Running the Detailed Statistics Report for Referrals

1. Open the **Detailed Statistics** report from the **Report** menu <u>or</u> search for a group of Referrals with **Referral Search**

We recommend using the built in searches for Referral reports. Most users will want to run the report on ***Referrals Received****, however, users who also send a lot of Referrals may additionally want to run the report on* ***Referrals Sent****.*

2. Enter any additional parameters in the **Detailed Statistics** window as required



- If you ran the report from a list, the **Create Report for** field will default to **Selection of # Referrals** otherwise you will need to select either **Referrals Received** or **Referrals Sent**
- Select a **Date Range** from the list of values or manually enter another date range
- Adding a **Log Type** or **Log Action** will limit the report to the Logs with those values
- Selecting an **Office** from the list will only include Referrals sent by/to that office. Holding down the control key will allow you to select multiple offices at once. If all the offices are in a particular division, they may be identified as an **Office Pool**. Click an **Office Pool** name to see the list of offices that will be included in the report.
- The report can be summarized by **Action**, **Type** or **Office**
- Checkboxes allow users to **Show Totals**, **Hide Log Type** or hide **Repeated Values**
- The report sorts overdue Referrals into columns indicating how seriously overdue the Log is based on the defaults of **30** days and **180** days overdue. These can be manually updated as required.

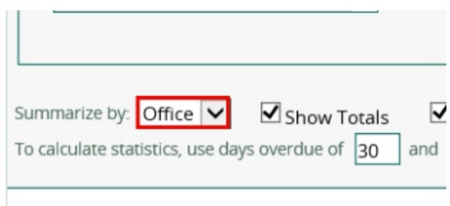
3. Click the **Detailed Stats** button to generate the report

Detailed Statistics Report

Referrals Received from for the period 1 November 2015 to 30 November 2015

Office	Referral Action	Refs Recived	Refs Comp	Refs Open	0-30 Late	31-180	>180 Late	Avg Days to Comp
CCU-Correspondence	Assign	102	107	115	43	20	0	33.0
	Close File	2	2	0	0	0	0	1.0
	Draft-ADM's sig	1	0	15	14	0	0	0.0
	Draft-DM's sig	3	0	4	2	1	0	0.0
	Draft-Exec Director	2	3	2	0	0	0	21.3
	Draft-Min sig/Opp MLA	5	3	10	7	2	0	20.3
	Draft-Minister's sig	6	5	9	3	1	0	43.2
	FYI	83	67	169	0	0	0	4.3
	Meeting Request	0	1	2	0	0	0	85.0
	Phone Call	2	3	3	1	1	0	38.3
	Redirect	1	0	1	1	0	0	0.0
	Review	0	3	0	0	0	0	20.7
	Revision	1	3	1	0	1	0	31.7
	Template Response	2	2	2	1	0	0	18.5
CCU-Correspondence		**210**	**199**	**333**	**72**	**26**	**0**	**22.9**
DMO-Deputy Minister	Cabinet Minute	0	0	3	0	0	0	0.0
	File	0	0	1	0	0	0	0.0
	File/Close Log	0	0	3	0	0	0	0.0
	For Review	0	0	1	0	0	0	0.0

- The title of the report includes the date range of the Referrals in your selection based on the **Date Sent**
- The report lists each Referral by **Sending Office** (for **Referrals Received**) or **Receiving Office** (for **Referrals Sent**), **Referral Action**, how many **Referrals Received/Sent** during the reporting period, how many **Referrals Comp**(leted) during the reporting period, how many Referrals were still open and, of those that are still open, how late are they (less than **30** days, between **31-180** days or over **180** days), and the average number of **Days to Comp**(lete) (from **Date Sent** to **Date Completed**)
- The report provides sub-totals by office and a **Grand Total** at the end of the report
- To remove the sub-sort by **Referral Action**, choose to **Summarize by Office** in your parameters

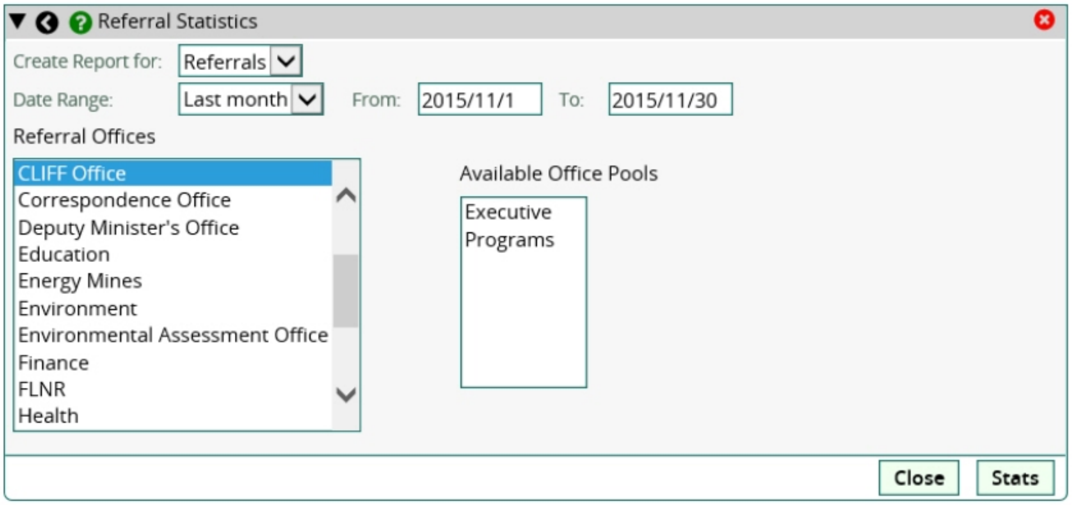


4. Use your browser's tools to print the report or the report can be copied and pasted into another application (such as Word or Excel)

Referral Statistics Report

The **Referral Statistics** report calculates statistics for Referrals received for each office selected. The report can only be run from the **Reports** menu.

1. From the **Report** menu, select **Referral Statistics**
2. Enter any additional parameters in the **Referral Statistics** window as required



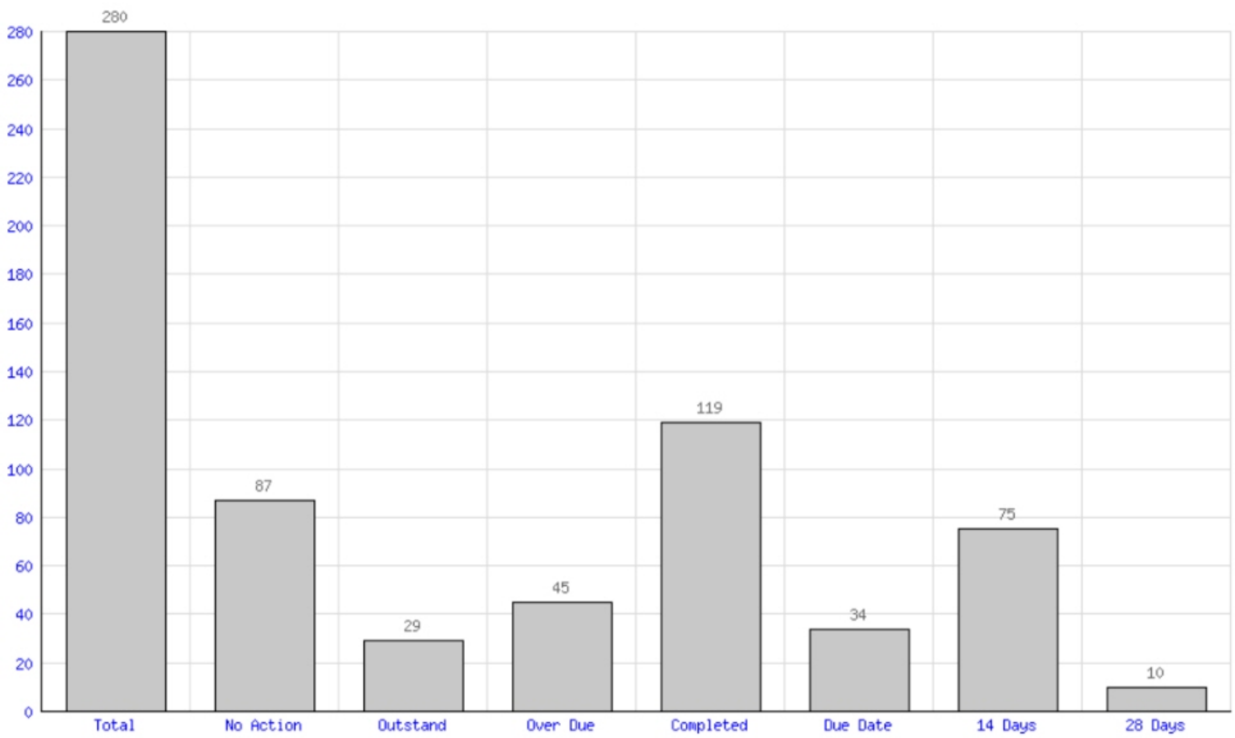
- The **Create Report for** field will default to **Referrals** and cannot be changed

5. Select a **Date Range** from the list of values or manually enter another date range

- The **Referral Offices** block will display your current office selected by default. Holding down the control key will allow you to select multiple offices at once. If all the offices are in a particular division, they may be identified as an **Office Pool**. Click an **Office Pool** name to see the list of offices that will be included in the report.

6. Click the **Stats** button to generate the report

Demo Data
CLIFF Office
Referral Statistics Report
Referrals Statistics for CLIFF Office for the period 1 November 2015 to 30 November 2015



Of the completed referrals:

% Completed by Due Date:	28.6
% Completed 14 Days after Due Date:	63.0
% Completed 28 Days after Due Date:	8.4
Average # of Days to Completion	10.8

- The title of the report includes the date range of the Referrals in your selection based on the **Date Sent**
- The **Total** column shows the total number of Referrals received by the office during the date range specified
- The **No Action** column is the number of Referrals with no due date
- The **Outstanding** column is the number of Referrals sent during the date range that are due but not overdue
- The **Overdue** column is the number of Referrals send during the date range that are overdue
- The **Completed** column is the number of Referrals completed during the date range
- The **Due Date**, **14 Days** and **28 Days** columns indicate how close to the due date the Referrals were completed
- The lower section of the report provides percentages for meeting or exceeding due dates and provides an **Average # of Days to Completion** for the completed Referrals

7. Use your browser's tools to print the report. The text portion of the report can be copied and pasted into another application (such as Word or Excel) and the image (graph) can be downloaded by right-clicking on the image and selecting **Save Picture As**….

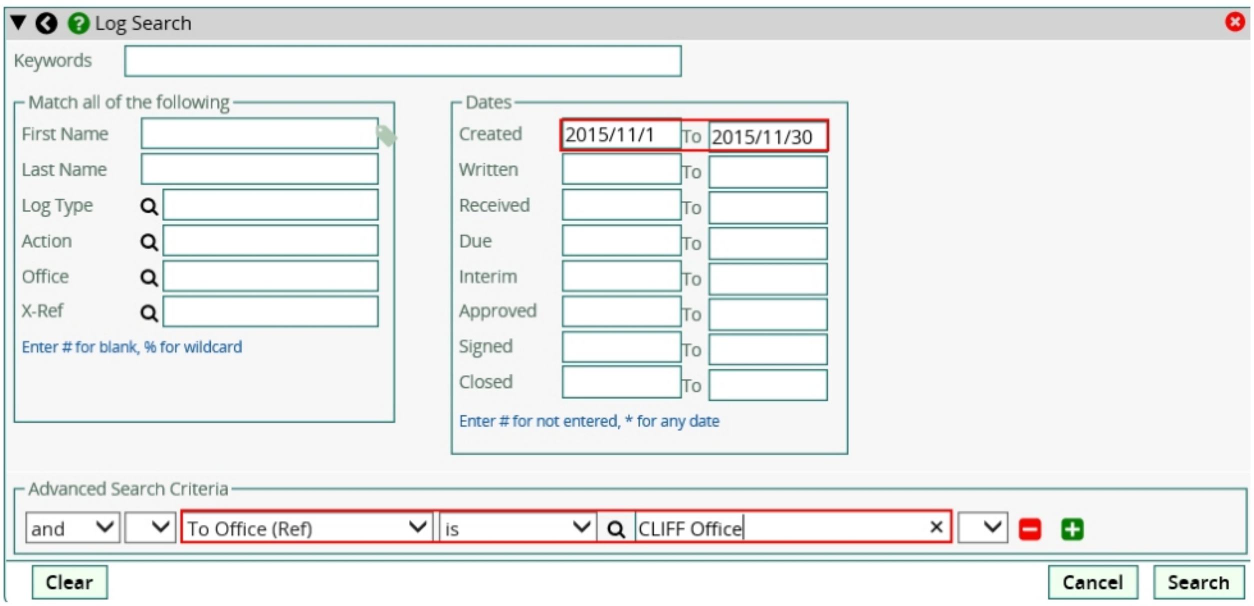
Count Summary Report

The **Count Summary** report provides a count of each value in a specific field. The report can be run from the **Reports** menu or from a list of search results.

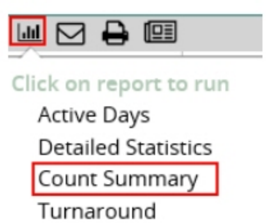
1. Open the **Count Summary** report from the **Report** menu or search for a group of Logs with **Log Search**

*We recommend using **Log Search** before running the report for Logs to allow the user to report on closed or signed Logs or to limit the selection to Logs referred to a certain office.*

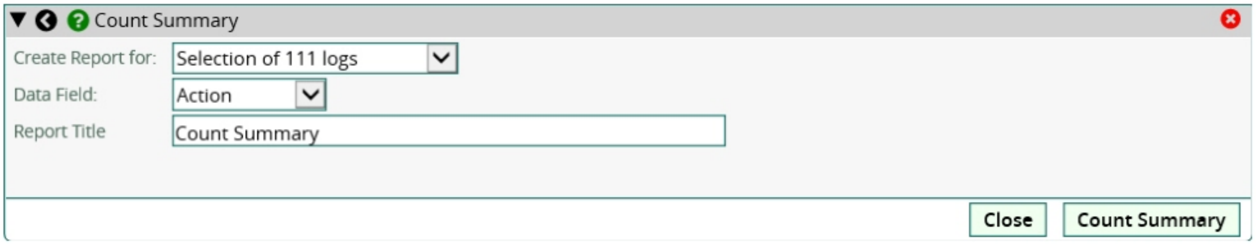
The example below will search for all Logs referred to one office last month.



2. If you are running the report from a list of search results, from the **Statistics Report** icon, select **Count Summary**



3. Modify the parameters in the **Count Summary** window as required



- If you ran the report from a list, the **Create Report for** field will default to **Selection of # Logs**. If you are running the report from the **Report** menu, it will default to **Logs Entered** (Logs created by your current office in your default search range).
- In the **Data Field** drop-down menu, select the field to count (most common are **Action**, **Type** and **Issue**)
- The **Report Title** can be changed to add details about the selection used in the report (i.e. *November 2015 Referrals to CLIFF Office*)

4. Click the **Count Summary** button to generate the report

Demo Data
CLIFF Office
Count Summary
Selection of Logs for CLIFF Office

Action	**Count**
BN-Decision Note	1
BN-Meeting Note	1
E-Mail	1
Order in Council	1
Reply Direct	7
Signature-ADM	1
Signature-Director	1
Signature-Minister	3
Total	16

- If there are Logs in the selection with no value in that field (field is blank), CLIFF will display a line at the top of the report with a count of the blank fields.

Issue	**Count**
[blank]	35

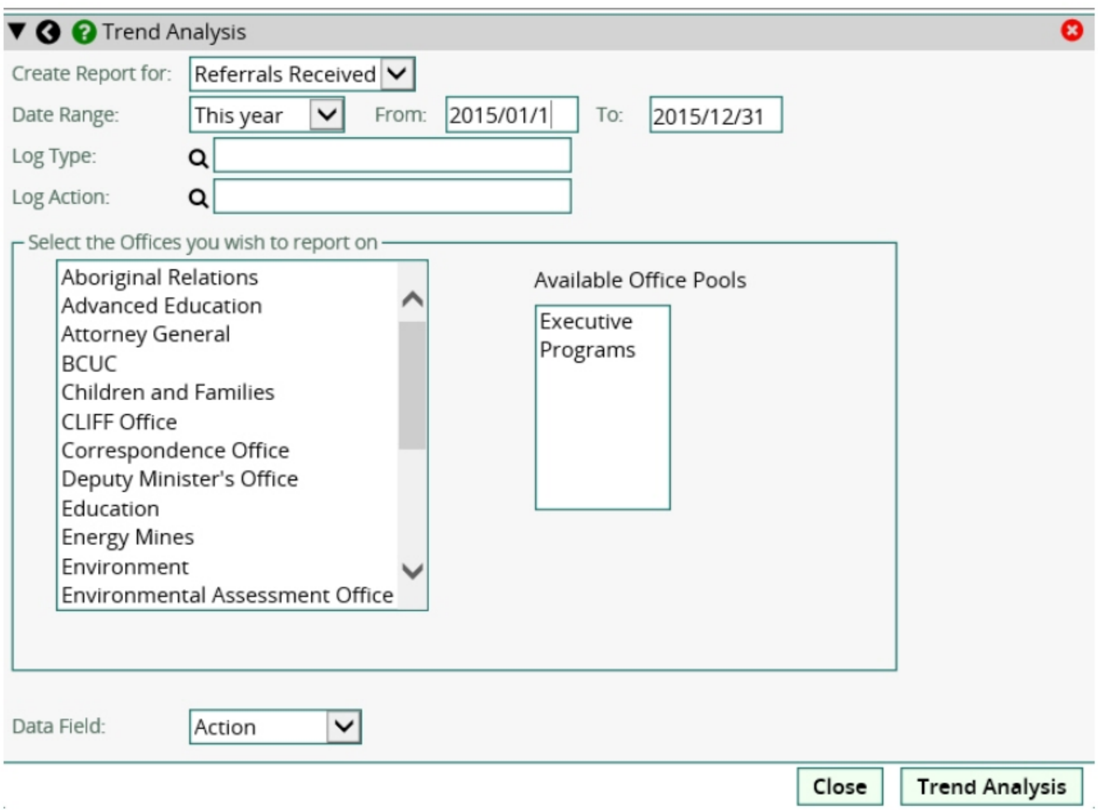
5. Use your browser's tools to print the report or the report can be copied and pasted into another application (such as Word or Excel)

6. Different count summary reports can be run from the same selection of Logs. Navigate back to the **Count Summary** window and select a different **Data Field**

Trend Analysis Report

The **Trend Analysis** report is similar to the **Count Summary** report in that it provides a count of each value in a specific field, but **Trend Analysis** provides a count per month for the date range identified. The report can only be run from the **Reports** menu.

1. Open the **Trend Analysis** report from the **Report** menu
2. Modify the parameters in the **Trend Analysis** window as required



- The **Create Report for** field will default to **Logs**. This can be modified to **Referral Received** or **Referrals Sent** (most users will want to use **Referrals Received** so they can view statistics on all assignments to their office, regardless of who logged them).
- Although the **Date Range** can be set for a month, a trend can only be identified if there are multiple months of values (most users will want to choose **This Year** or **Last Year** or construct a date range over multiple years)
- Adding a **Log Type** or **Log Action** will limit the report to the Logs with those values
- Selecting an **Office** from the list will only include Logs created by that office (for **Logs**), sent by that office (for **Referrals Received**) or received by that office (for **Referrals Sent**). Holding down the control key will allow you

to select multiple offices at once. If all the offices are in a particular division, they may be identified as an **Office Pool**. Click an **Office Pool** name to see the list of offices that will be included in the report.

- The report can be summarized by a number of fields, including **Action**, **Type** or **Issue**

6. Click the **Trend Analysis** button to generate the report

DMO-Deputy Minister
Trend Analysis Report
Referrals Received from DMO-Deputy Minister for the period 1 January 2015 to 31 December 2015

Action	2015/01	2015/02	2015/03	2015/04	2015/05	2015/06	2015/07	2015/08	2015/09	2015/10	2015/11	2015/12
Action Request by DM					1	1						
Action Request by Minister		1										
Advice					1							
Approval	2	2	1	2			4	3	3	4	3	
BN-Decision Note	3	2	2	5	2	3	3	5	3	2	1	
BN-Information Note	4	4	2	15	5	5	6	4	10	23	4	
Briefing Material - DM	1	2	1	1							1	
Briefing Material - Minister	6	7	2	4			5		3			
Bullets Request from MO	1											
Draft-ADM				20	70	28	29	8	6	6	9	
Draft-Assoc. DM							1	1	1	4	3	1
Draft-Deputy	1	3	3		1	3	4	5	3	3	5	
Draft-Executive Director									1			
Draft-Minister	2	6	1	11	10	7	22	26	5	14	7	
Draft-Premier	1			1								
Draft-Program Advisor									1			
Estimates Note						1						
Info/File					3		1				1	
Meeting Request				1		2	5		1	2	1	
Memo	1	1							1		1	
Reply Direct							2	2	5	2	2	
Signature/Approval	2	1		2	2	4	1	1	1			
Speaking Notes		1			1				1			
Speaking Notes/Presentation					1	1						
UBCM Resolutions							3	4	14			
approval			1									
Total	**24**	**30**	**13**	**62**	**97**	**55**	**86**	**59**	**59**	**60**	**38**	**1**

- The first column will display all the values used in the date range and involving the office specified in the report parameters
- Each of the remaining columns provides a count for one month
- A total for the month of all values is provided in the last row

7. Use your browser's tools to print the report or the report can be copied and pasted into another application (such as Word or Excel)

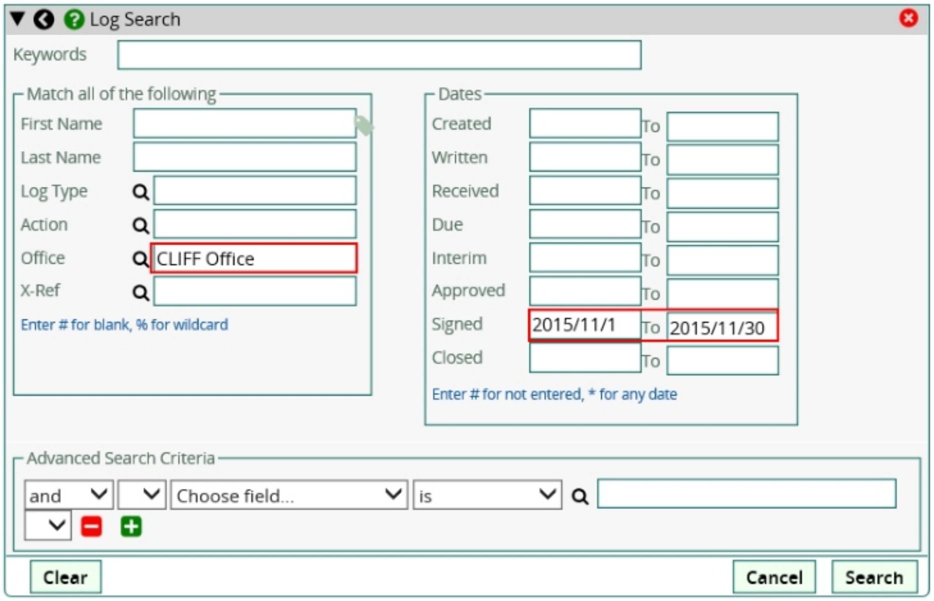
Turnaround Report

The **Turnaround Report** is similar to the **Detailed Statistics** reports but allows the turnaround statistics to be determined by fields selected by the user. The report can be run from the **Reports** menu or from a list of search results.

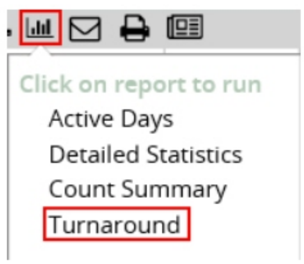
1. Open the **Turnaround** report from the **Report** menu <u>or</u> search for a group of Logs with **Log Search**

*We recommend using **Log Search** before running the report to allow the user to limit the report to signed Logs.*

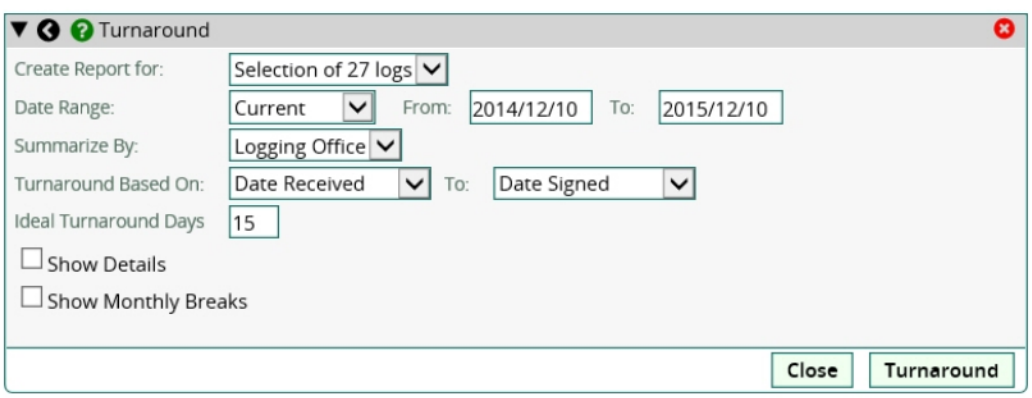
The example below will search for all Logs created by one office that were signed last month.



2. If you are running the report from a list of search results, from the **Statistics Report** icon, select **Turnaround**



3. Enter any additional parameters in the **Turnaround** window as required



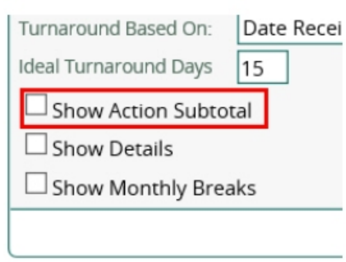
- If you ran the report from a list, the **Create Report for** field will default to **Selection of # Logs**. If you are running the report from the **Report** menu, it will default to **Logs** (for Logs entered by your current office).
- The **Date Range** will default to **Current** and does not need to be modified if you are running the report from a list. If you are creating the report for **Logs** entered by your office, you can select the date range from the drop-down list or manually enter the dates.
- The **Turnaround Based On** fields let you select the dates that are used to calculate the turnaround. The first date will be used as the starting date and the second date is used as the end date. In most cases, users will be able to leave the defaults of **Date Received** to **Date Signed**.
- The **Summarize By** field lets you select a field to summarize the results. The default is Logging Office but can be changed to a variety of fields including **Branch Rsp** or **Issue**
- The **Ideal Turnaround** is used to determine if you are meeting your goal turnaround time for the type of assignments included in the report
- Checkboxes allow users to **Show Details** (show the details of each Log in the selection) or hide **Show Monthly Breaks** (to provide a sub-total by month if your date range is longer than one month)

4. Click the **Turnaround** button to generate the report

Correspondence
Turnaround Report (Received to Signed)
Logs from 10 December 2013 to 10 December 2015

Office_rsn	Action	# of logs	Turnaround	Average	<= 15 days	> 15 days
DMO-Deputy Minister	Invitation	1	6	6.0	1	0
DMO-Deputy Minister	Necessary Action	2	30	15.0	1	1
DMO-Deputy Minister	Reply Direct	2	12	6.0	2	0
Total for DMO-Deputy Minister		5	48	9.6	4	1

- The title of the report includes a date range indicating the **Date Range** in the report parameters
- The first column displays the field selected in the **Summarize By** field in the report parameters
- The second column sorts the data by **Action**. To remove the sub-sort by Action, deselect the **Show Action Subtotal** on the report parameters window.



- The **# of Logs** provides a count of Logs meeting the criteria of that row
- **Turnaround** provides a total number of days for all the Logs in that row
- **Average** is determined by dividing the **Turnaround** by the **# of Logs**
- The last two columns provide a count of how many Logs did/did not meet the goal turnaround time

5. Use your browser's tools to print the report or the report can be copied and pasted into another application (such as Word or Excel)

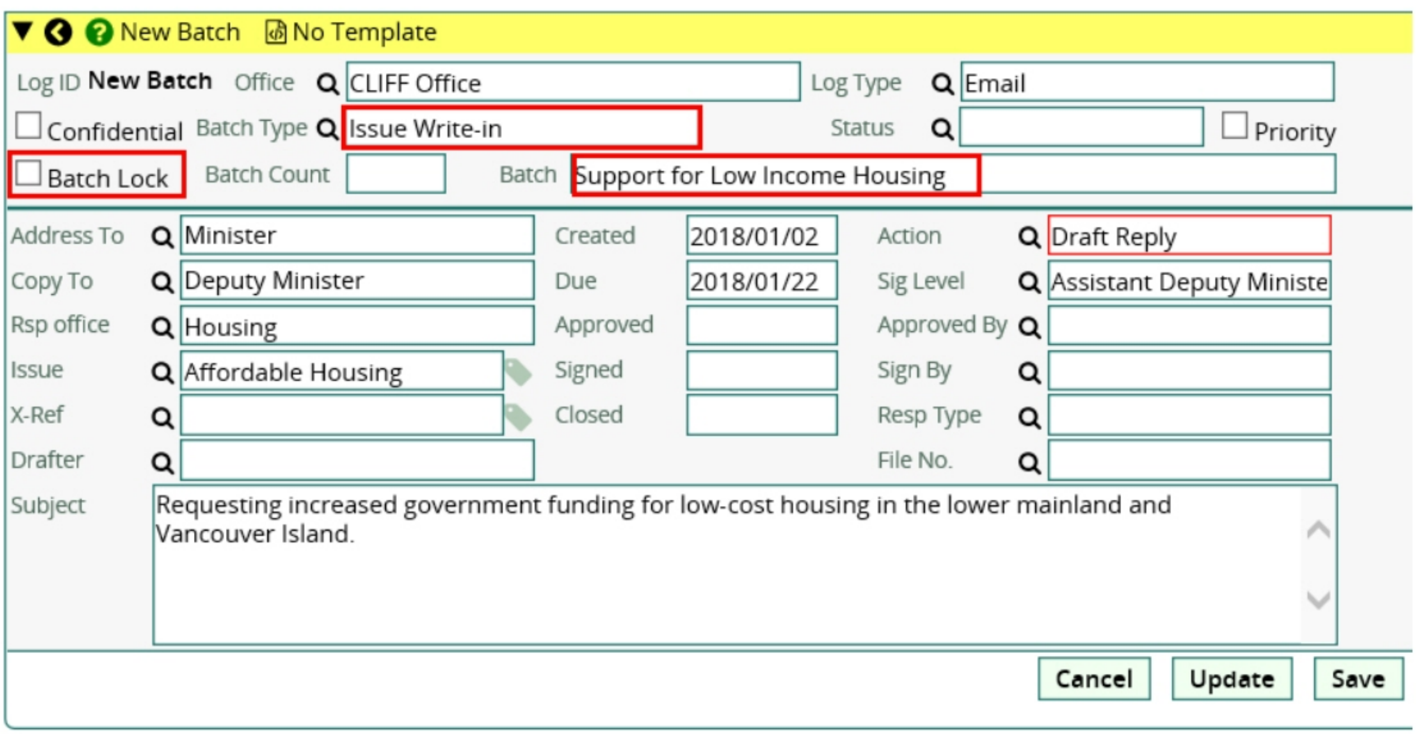
Batches Menu

Logs that need to be grouped together in CLIFF can be batched. The **Batches** menu allows you to view and update existing batches and create new ones.

Creating a New Batch

1. From the **Batches** menu, click the **Add** button

2. In the batch header enter the information pertaining to all parts of the batch

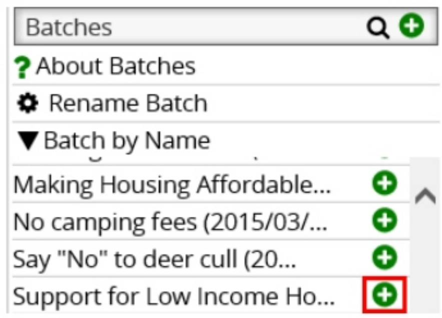


The batch header contains many of the same fields as a regular Log with a few additional fields and no author fields:

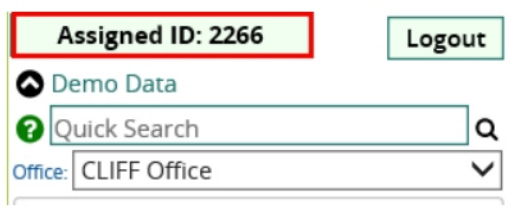
- **Batch Lock** checkbox - prevents users from adding new members to this batch (typically done when this batch of letters has been sent for signature and a new batch is required for the next wave of correspondence)

- **Batch Count** field - updated automatically as new members are added to CLIFF. This field can be manually updated to record the number of letters received if they are not being entered individually as batch members into CLIFF
- **Batch Type** field - indicates the type of batch (i.e. write-in campaign, petition, project, etc.)
- **Batch** field – the descriptive name of the batch

3. Once the information is entered and any required attachments and Referrals are added, click **Save** to close the header
4. From the **Batches** menu, click to sort the batches **Batch By Name** or **Batch By Date**
5. Click the **Add Member** icon



6. Enter the name and address information and add/change any of the Log details (all the information from the batch header is copied to the member like a template). Note that most batch members do not need Referrals as the Referrals on the batch header are usually sufficient to indicate the current status of the batch.
7. Click **Save** to save the existing member and open a new blank member. The CLIFF ID assigned to the saved member will display briefly in the top left corner of the CLIFF window.

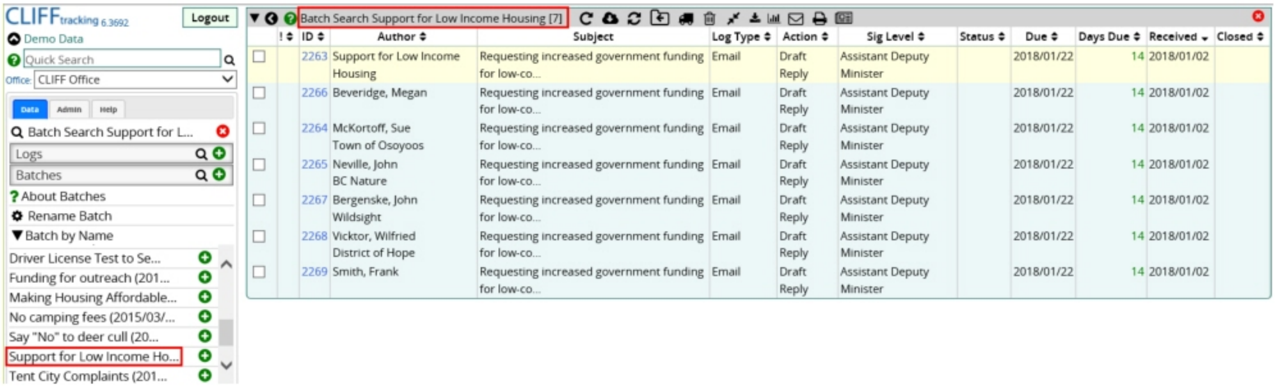


8. Continue adding new members until no more are required and then click the **Cancel** button to clear the screen

Viewing and Updating Batches

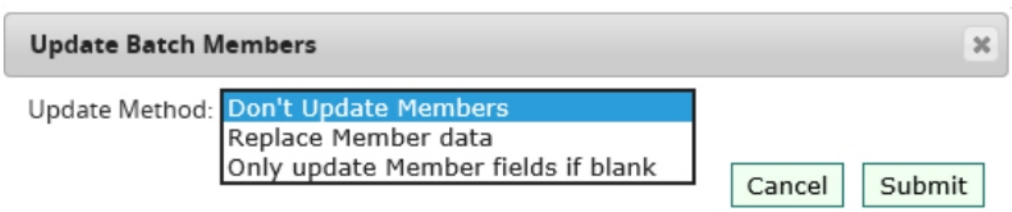
Once the batch is saved, it can be viewed or updated from the **Batches** menu.

1. From the **Batches** menu, click to sort the batches **Batch By Name** or **Batch By Date**
2. Click the name of the batch to view the header and any members



- The batch header is colour-coded yellow and always appears at the top of the list
- The batch members are colour-coded blue

3. To update the batch, open the batch header and make the required changes
4. Click **Save** or **Update**
5. Select an option for updating the members

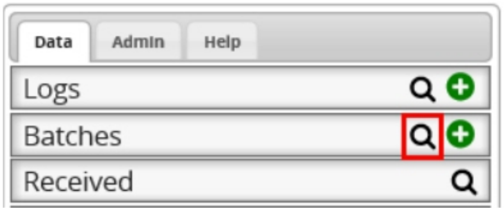


- **Don't Update Members** – the change will only be saved to the batch header
- **Replace Member data** – the data in the fields you updated in the header will replace all the data in the corresponding member field (i.e. if you make a change to the **Subject** field in the header and select this option, the contents of the **Subject** field in all the members will be replaced with the contents of the header **Subject** field)
- **Only update Member fields if blank** - the data in the fields you updated in the header will be added to the corresponding member fields if they do not already contain a value (i.e. if you make a change to the **Sign By** field in the header and select this option, any members that do not have a value in the **Sign By** field will have this value added)
- Entering a **Closed Date** on the header will close the batch and all the members

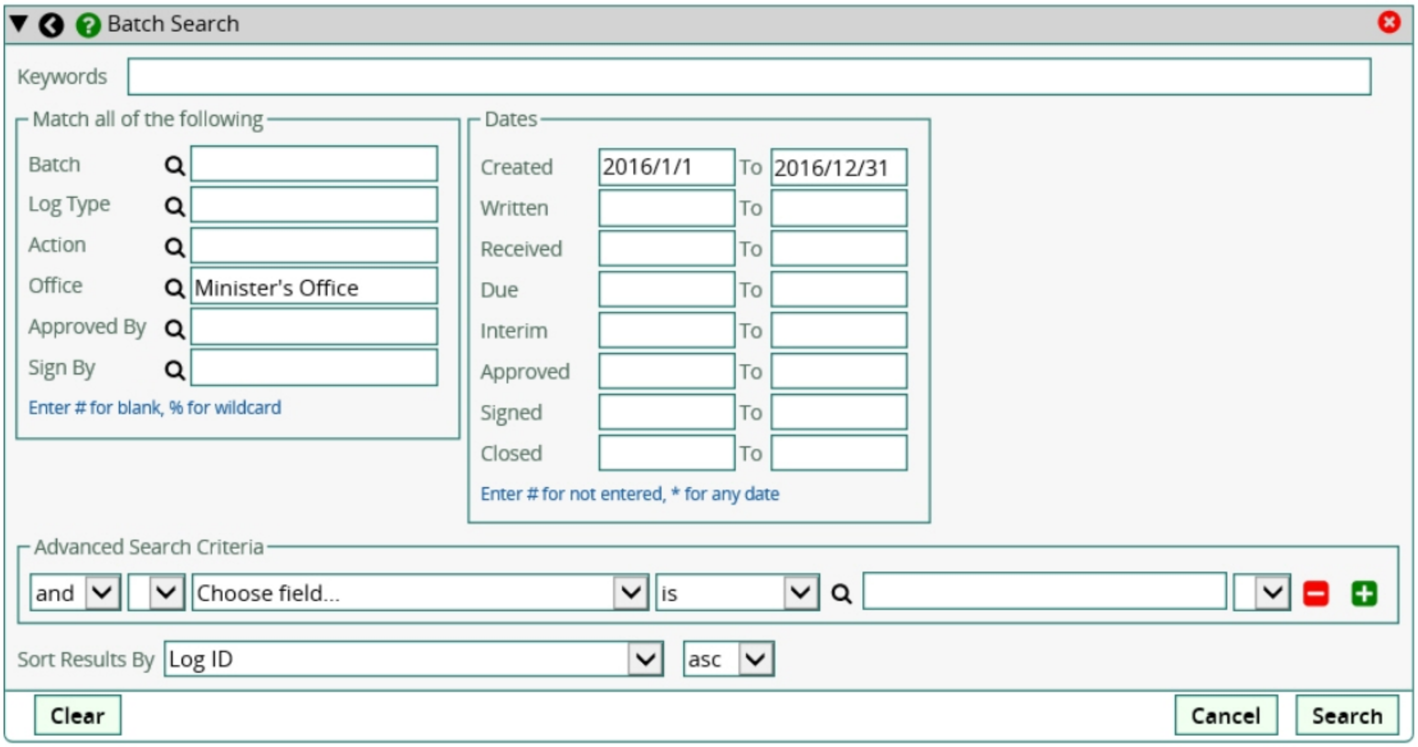
Searching Batches

As the **Batches** menu only displays open batches (those with no **Closed** date) you will need to use the batch search to find closed batches or a group of specific batches (i.e. finding all the batches created by one office in a year).

1. From the **Batches** menu, click the **Search** icon



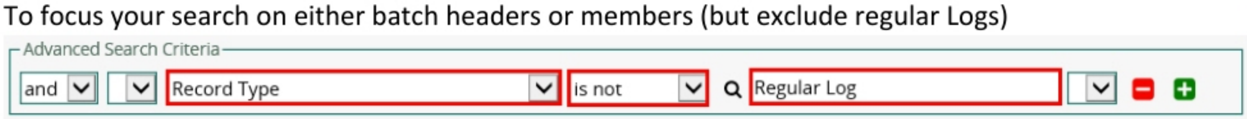
2. Enter the required criteria



- The **Batch** field allows you to search by batch name
- Search window includes the same functionality found in the Log Search window
- You can also choose to include/exclude batches from the **Log Search** window.
    - To exclude batches from **Log Search**, add the following **Advanced Search Criteria**

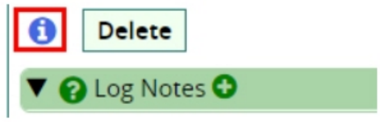
    - To focus your search for just batch headers or just batch members, select the appropriate **Record Type**

    - To focus your search on either batch headers or members (but exclude regular Logs)

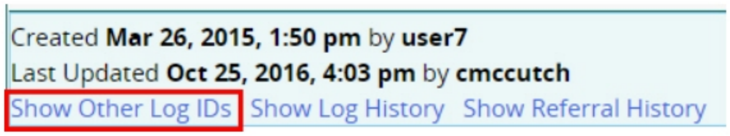


Accessing the Batch Header from a Member

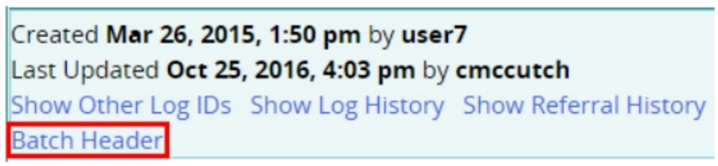
1. Click the **Additional Information** icon



2. Click the link to **Show Other Log Ids**



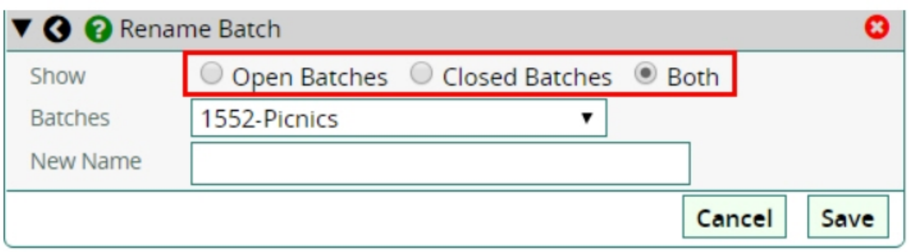
3. Click the **Batch Header** link to open and view the Header



Note that **Show Other Log IDs** will also display the Log number from a previous ministry if the Log was created in another organization and transferred to your CLIFF.

Renaming a Batch

The **Rename Batch** window allows you to view and update the name of a Batch.

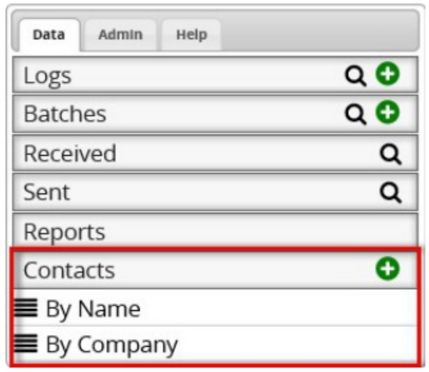


1. From the **Batch** menu, select **Rename Batch**
2. Toggle to view a list of **Open Batches**, **Closed Batches** or **Both**
3. Select the correct batch
4. Enter the **New Name**
5. Click **Save**

Note that if you do not have access to **Close Logs** in your **User Account**, you will not be able to rename closed Batches.

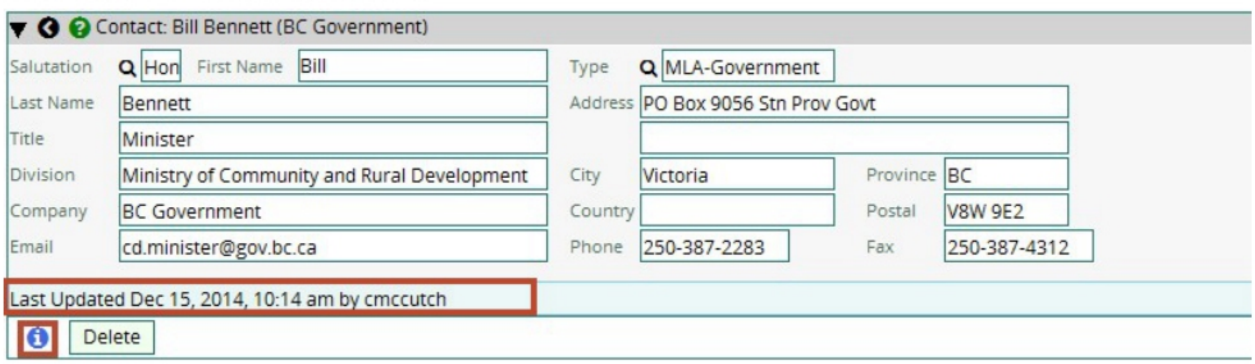
Contacts Menu

The contacts that are accessed from the **Author** block in the Log are managed under the **Contacts** menu:



1. Click **By Name** (to sort the list by the author's last name) or **By Company** (to sort the list by the company name)
2. From the list, click the last name or company name to open the record
3. Edit the record as required. ***Note that the list is shared across your organization and any changes you make will impact all CLIFF users.*** Most users will not be able to delete contact records. Contact your CLIFF Administrator for assistance.
4. Click **Save** to save and close the record

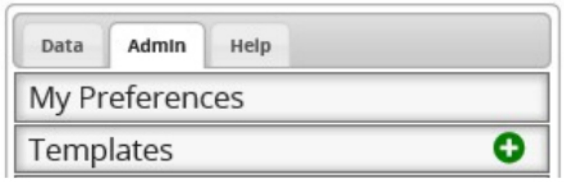
Each **Contact** includes **Audit** details which can be viewed by clicking the **Info** icon



Note that changes made to the **Contact** record will not update existing Logs.

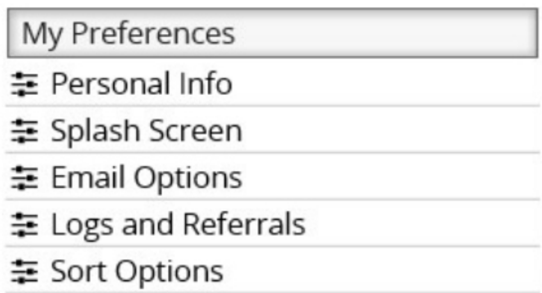
Admin Menu

Most CLIFF users will have limited administration access within the application. As a result, the **Admin** menu, will only list the functions that users have permission to access. In most cases this will be limited to:



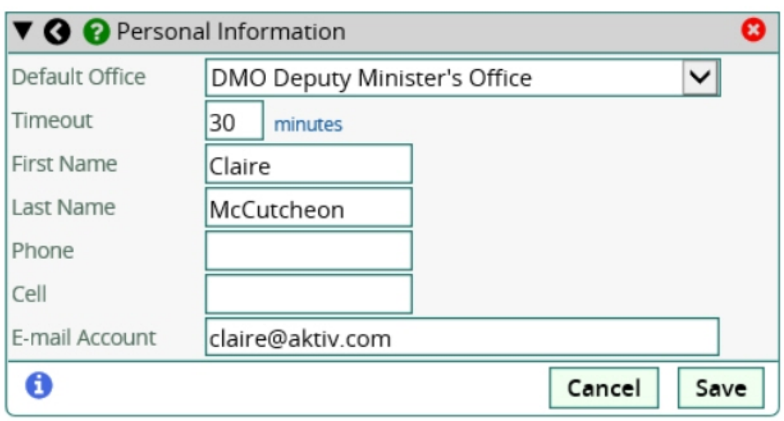
My Preferences

My Preferences allows users to update their user preferences. Within the **My Preferences** menu, users can update the following:



Personal Info

When **Personal Info** is selected, the **Personal Information** window is displayed allowing users to update their CLIFF details. This information will be set up by your administrator when your User Account is set up.



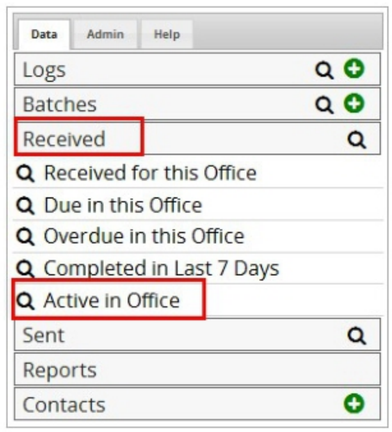
- **Default Office** – indicates which office is displayed as your current office when you Log into CLIFF. If you are finding that you are doing more work for one of your back-up offices, you may wish to change your **Default Office** (even if it's just temporary).
- **Timeout** – the timeout period indicates how long you can leave CLIFF untouched before you are Logged out. The default is set to 30 minutes and should only be increased for users who need urgent access to CLIFF. The maximum for most organizations is 120 minutes.
- **First Name/Last Name** – can be updated as required
- **Phone/Cell** – not required by most organizations

- **Email Account** – if users send you email from CLIFF, they will be directed to this email account. In addition, any emails you send from CLIFF will display this address as the sending address.

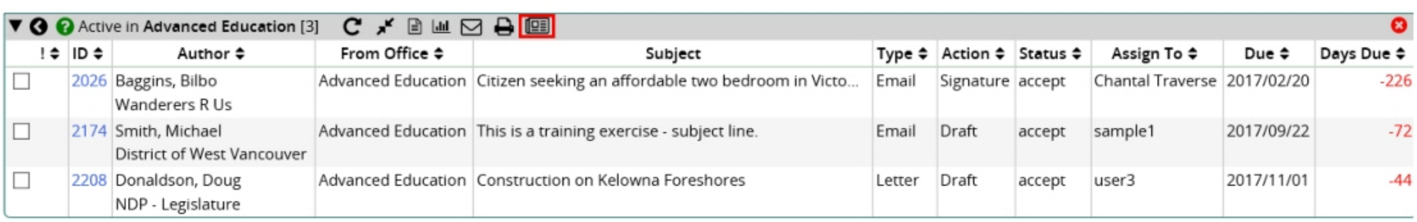
Splash Screen

You can choose to have a report (or multiple reports) appear automatically on your splash screen (main screen when you Log in) when you first access CLIFF. Users can choose to select different kinds of searches to appear as required. Before the searches can be selected from the **Splash Screen** menu, the reports must be run and saved (it is worthwhile checking the splash screen list to see if the report you want is already there and, if not, follow the instructions below).

1. Click to select the search for the type of records you want. Most users will want **Received – Active in Office** but you can also select **Sent – Sent that are Active** or **Logs – Open for Office** as other examples.



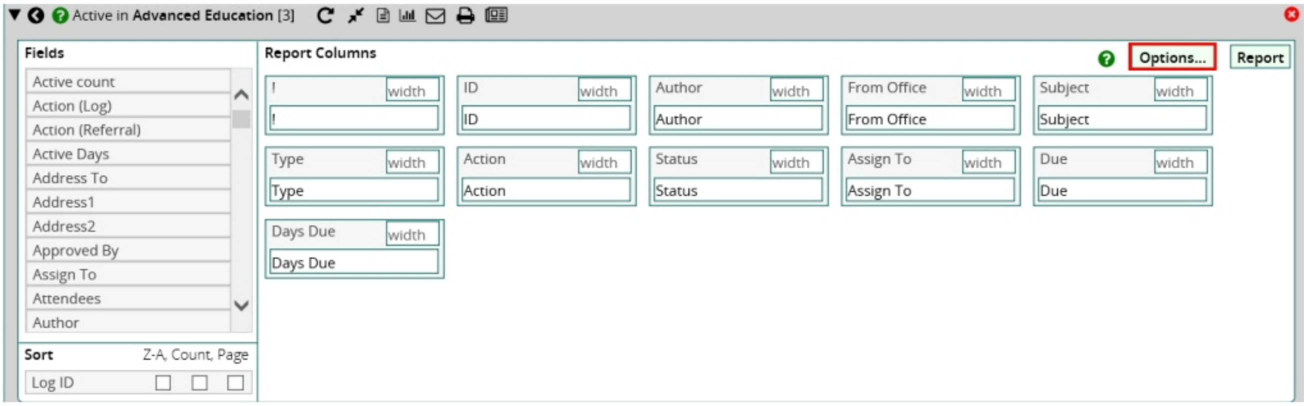
2. When the search results appear, click the **Custom Report** icon at the top of the list



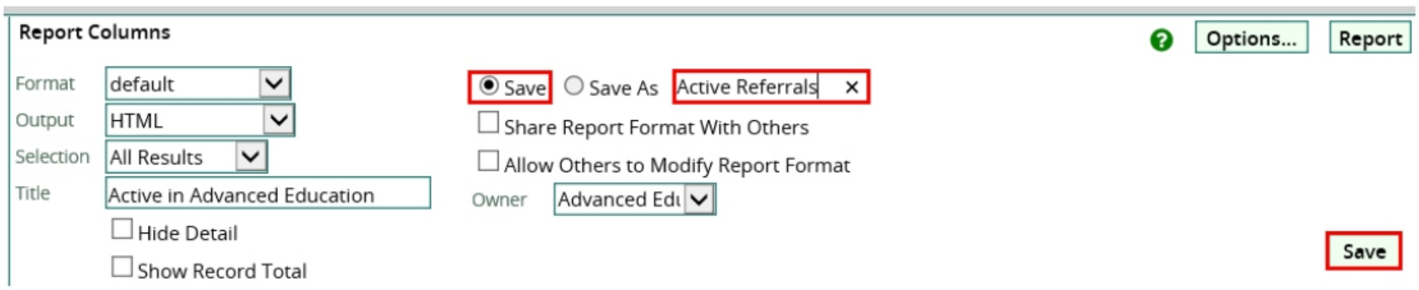
Active in Advanced Education [3]

!	ID	Author	From Office	Subject	Type	Action	Status	Assign To	Due	Days Due
	2026	Baggins, Bilbo Wanderers R Us	Advanced Education	Citizen seeking an affordable two bedroom in Victo...	Email	Signature	accept	Chantal Traverse	2017/02/20	-226
	2174	Smith, Michael District of West Vancouver	Advanced Education	This is a training exercise - subject line.	Email	Draft	accept	sample1	2017/09/22	-72
	2208	Donaldson, Doug NDP - Legislature	Advanced Education	Construction on Kelowna Foreshores	Letter	Draft	accept	user3	2017/11/01	-44

3. In the **Report Format** window, click the **Options** button

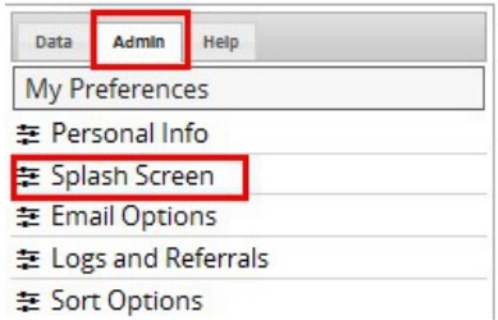


4. Ensure the **Save** box remains selected and provide a name for your report

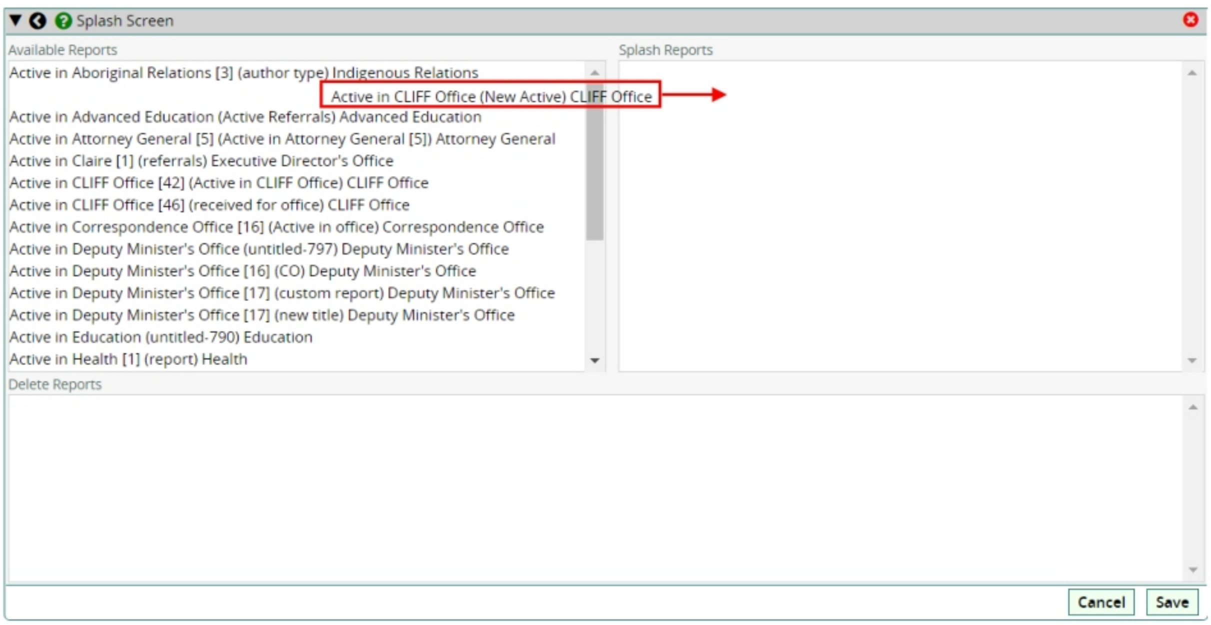


5. Click **Save** to save the report
6. Close the report window to return to the main CLIFF screen

7. Click the **Admin** tab and select **My Preferences** and then **Splash** screen

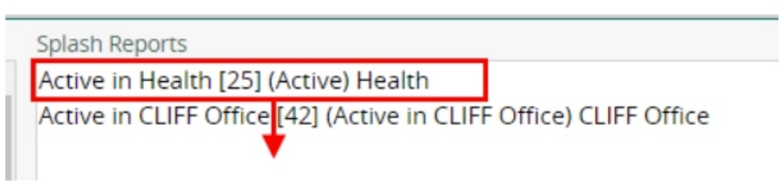


8. To add items to your **Splash Screen**, drag them from the **Available Reports** column to the **Splash Reports** column



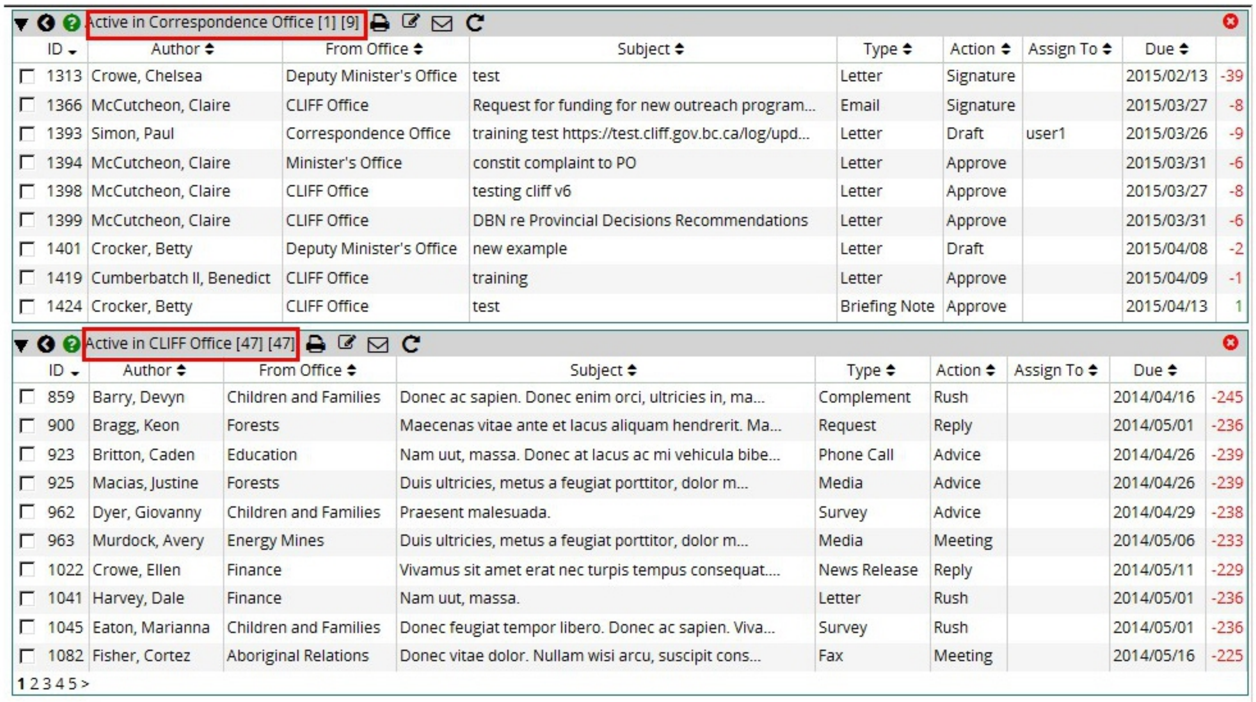
To remove items, reverse the instructions above and drag them from the **Splash Reports** column to the **Available Reports** column.

To change the order that items appear on your **Splash Screen**, drag and drop the reports into the appropriate order in the **Splash Reports** column.



9. Click **Save** to commit any changes.

Next time you Log in, you will see the list on screen for the search you selected. If you have selected more than one report, they will all appear automatically on your main CLIFF screen.


Active in Correspondence Office [1] [9]

	ID	Author	From Office	Subject	Type	Action	Assign To	Due	
☐	1313	Crowe, Chelsea	Deputy Minister's Office	test	Letter	Signature		2015/02/13	-39
☐	1366	McCutcheon, Claire	CLIFF Office	Request for funding for new outreach program...	Email	Signature		2015/03/27	-8
☐	1393	Simon, Paul	Correspondence Office	training test https://test.cliff.gov.bc.ca/log/upd...	Letter	Draft	user1	2015/03/26	-9
☐	1394	McCutcheon, Claire	Minister's Office	constit complaint to PO	Letter	Approve		2015/03/31	-6
☐	1398	McCutcheon, Claire	CLIFF Office	testing cliff v6	Letter	Approve		2015/03/27	-8
☐	1399	McCutcheon, Claire	CLIFF Office	DBN re Provincial Decisions Recommendations	Letter	Approve		2015/03/31	-6
☐	1401	Crocker, Betty	Deputy Minister's Office	new example	Letter	Draft		2015/04/08	-2
☐	1419	Cumberbatch II, Benedict	CLIFF Office	training	Letter	Approve		2015/04/09	-1
☐	1424	Crocker, Betty	CLIFF Office	test	Briefing Note	Approve		2015/04/13	1

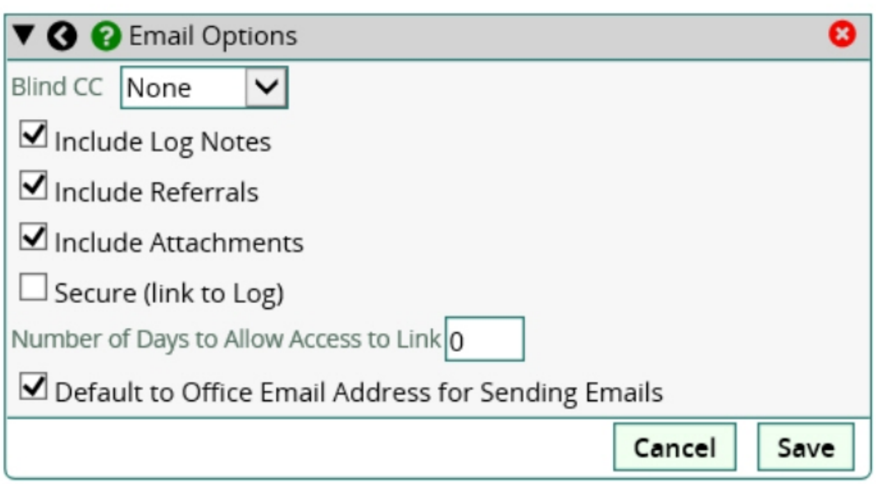
Active in CLIFF Office [47] [47]

	ID	Author	From Office	Subject	Type	Action	Assign To	Due	
☐	859	Barry, Devyn	Children and Families	Donec ac sapien. Donec enim orci, ultricies in, ma...	Complement	Rush		2014/04/16	-245
☐	900	Bragg, Keon	Forests	Maecenas vitae ante et lacus aliquam hendrerit. Ma...	Request	Reply		2014/05/01	-236
☐	923	Britton, Caden	Education	Nam uut, massa. Donec at lacus ac mi vehicula bibe...	Phone Call	Advice		2014/04/26	-239
☐	925	Macias, Justine	Forests	Duis ultricies, metus a feugiat porttitor, dolor m...	Media	Advice		2014/04/26	-239
☐	962	Dyer, Giovanny	Children and Families	Praesent malesuada.	Survey	Advice		2014/04/29	-238
☐	963	Murdock, Avery	Energy Mines	Duis ultricies, metus a feugiat porttitor, dolor m...	Media	Meeting		2014/05/06	-233
☐	1022	Crowe, Ellen	Finance	Vivamus sit amet erat nec turpis tempus consequat....	News Release	Reply		2014/05/11	-229
☐	1041	Harvey, Dale	Finance	Nam uut, massa.	Letter	Rush		2014/05/01	-236
☐	1045	Eaton, Marianna	Children and Families	Donec feugiat tempor libero. Donec ac sapien. Viva...	Survey	Rush		2014/05/01	-236
☐	1082	Fisher, Cortez	Aboriginal Relations	Donec vitae dolor. Nullam wisi arcu, suscipit cons...	Fax	Meeting		2014/05/16	-225

1 2 3 4 5 >

Email Options

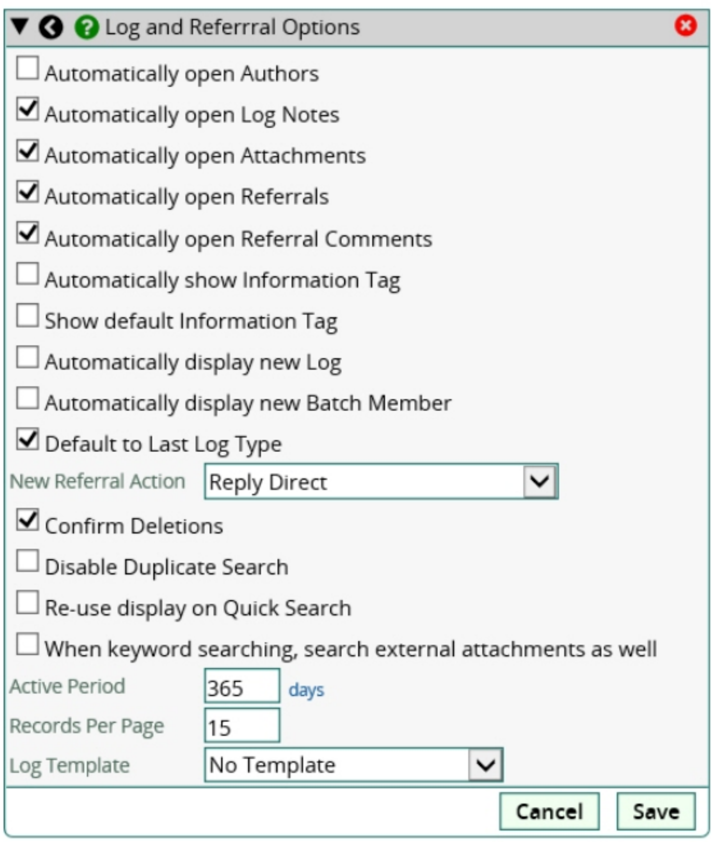
Within **Email Options**, you can choose the default settings for any emails you send from CLIFF. Remember that these selections can be updated in individual emails.



- **Blind CC** – you can choose to BCC your own email account, the email account set up for your office in CLIFF or none
- **Include Log Notes/Referrals/Attachments** – when you email Logs the Notes, Referral details and a list of Attachments will be included
- **Secure (link to Log)** – when selected, emails will not include any Log details. Instead, recipients must click a link to view the Log details. This link will only work within the government network and will prevent anyone without an IDIR ID from seeing the content. When unchecked, the full details of the Log are visible in the body of the email
- **Number of Days to Allow Access to Link** – if you are using the **Secure** email option, you can choose how many days the link to the Log details will work. This will prevent users from accessing Log details from older emails.
- **Default to Office Email Address for Sending Emails** – if you have a generic email address as the contact information for your CLIFF office, you can select this to use the generic email address for any emails you send from CLIFF as well.

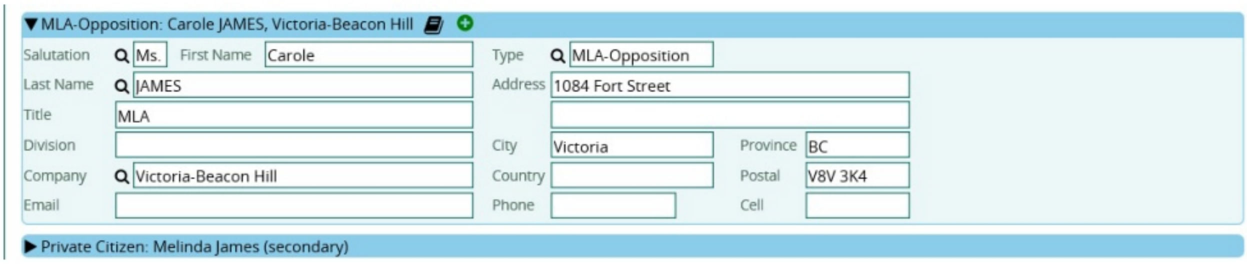
Logs and Referrals

Within **Logs and Referrals**, you can set preferences that will control some aspects of how you view data.



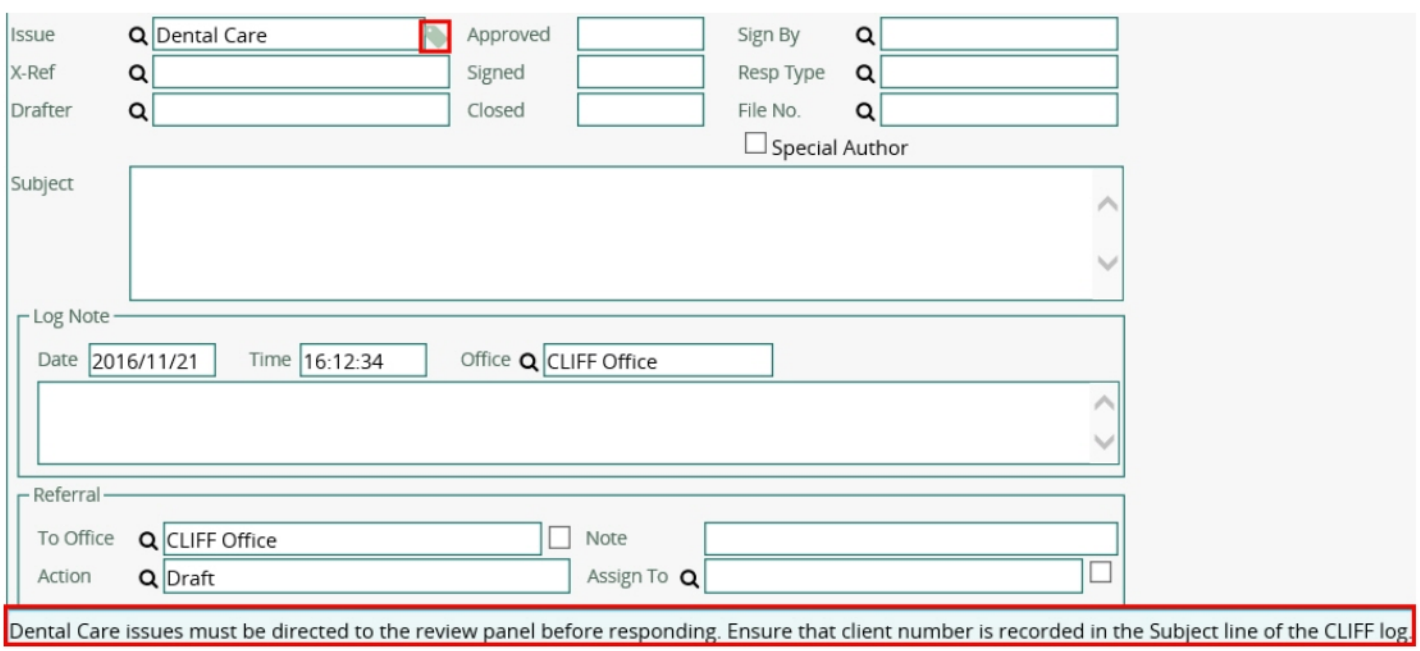
- **Automatically open Authors/Log Notes/Attachments/Referrals/Referral Comments** – when these are selected, CLIFF will display the full content of that block of data. If it is unselected, the information will be “rolled up” and must be manually expanded to see the full content.

  For example, if you checkmark **Automatically open Authors**, then the Log will open with the author block(s) like this with the primary author block open and any secondary authors closed:

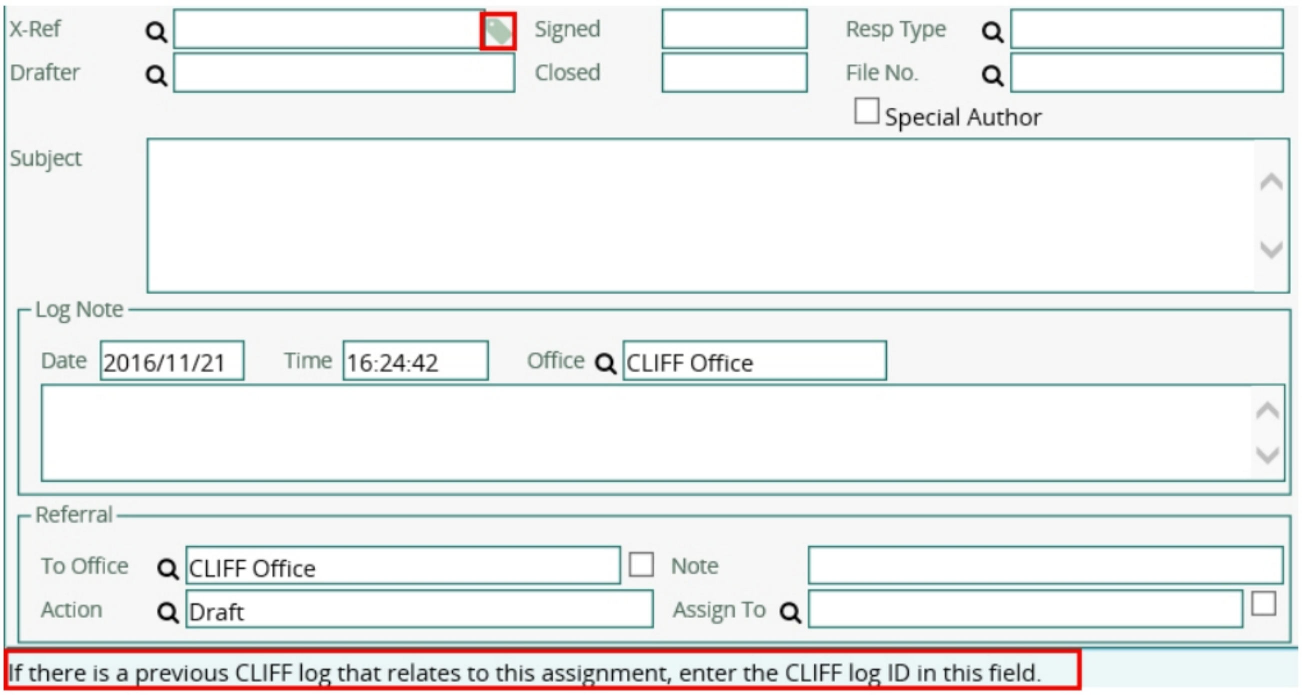


  If you do not checkmark **Automatically open Authors**, then the Log will open with the author block(s) closed like:

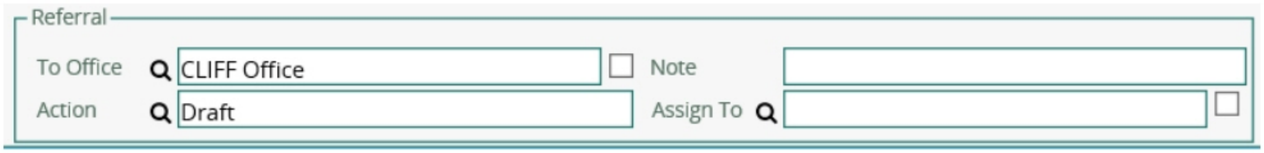
- **Automatically show Information Tag** – if your organization uses **Information Tags** (additional details regarding field values) then this determines whether or not the information is displayed automatically (checked) or you must click the info tag to see the note (unchecked). When the information is displayed, it appears at the bottom of the Log window.



- **Show default Information Tag** – if your organization uses **Information Tags** and there are default information tags set up (information regarding the general purpose of the field, rather than about a specific value), then this determines whether or not the information is displayed automatically (checked) or you must click the info tag to see the note (unchecked). When the information is displayed, it appears at the bottom of the Log window.



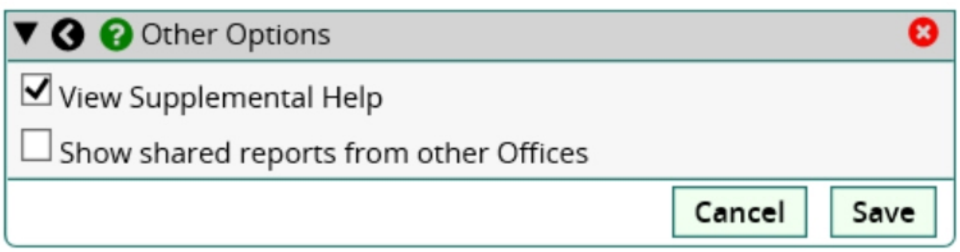
- **Automatically Display New Log** – for users that consistently create many new Logs in row, this function opens a new Log as soon as **Save** is clicked on the previous new Log. This saves the user the effort of having to click the **Add** Log icon after saving the previous Log.
- **Automatically Display New Batch Member** - for users that consistently create many new batch members in row, this function opens a new member as soon as **Save** is clicked on the previous new member. This saves the user the effort of having to click the **Add Member** icon after saving the previous one.
- **Default to Last Log Type** – when users create a new Log, CLIFF will automatically populate the Log **Type** field with the previous value used by that user (i.e. if the last Log you created had a Log **Type** of **Email**, the next time you click the **Add** Log button, the **Type** field will automatically display **Email**). Most users find this advantageous, however, if you are finding that you are forgetting to update the Type field with the new correct value, deselecting this checkbox will require you to manually select a value each time you create a new Log.
- **New Referral Action** – when you create a new Log, you can have the first Referral prepopulate with your office as the **To Office** and the **Action** selected from this drop-down field. When you open a new Log, those fields will be automatically populated and when the Log is saved, the Referral will be created.



- **Confirm Deletions** – if you have delete access in CLIFF, this will prompt you with a message to confirm that you really wish to delete the Log/Referral/attachment.
- **Disable Duplicate Search** – when unchecked, CLIFF will search for possible duplicates whenever a new Log is created. The search is based on the **Last Name** (or **Company** name if no last name is present) and the **Written** date (or **Created** date if the Log form does not have a **Written** date). If your position requires you to enter multiple Logs with the same last name in the same date written/created date range, you may wish to disable the duplicate search by checking this box.
- **Re-use Display on Quick Search** - if checked, **Quick Search** will reuse the same window for subsequent searches rather than opening a new window for each search.
- **Active Period** - the default number of days to search in. This controls the **Quick Search** and all the built-in searches under the **Logs** menu. It does not apply to Referral searches.
- **Records Per page** - the maximum number of records to show in a list
- **Log Template** – if you have a template that you use frequently, when checked the template will be automatically selected when a new Log is created

Other Options

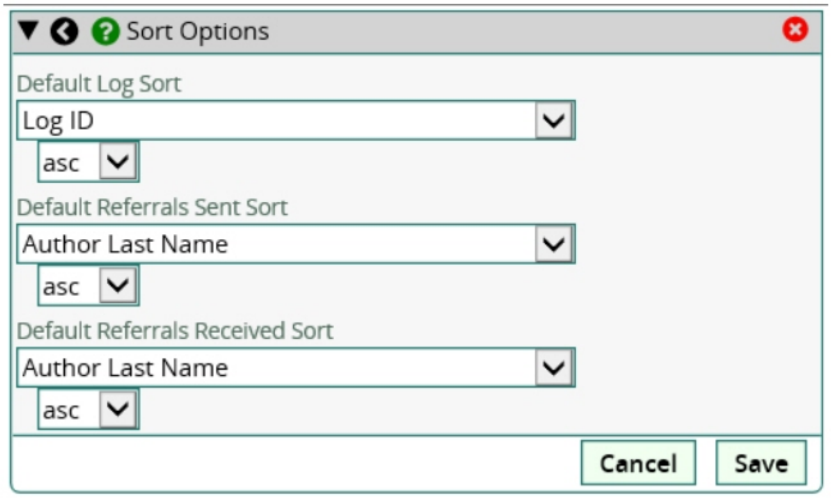
Within **Other Options**, you can select additional options for CLIFF usage.



- **View Supplemental Help** - in addition to the contextual help available from the **Show Help** icon , selecting **View Supplemental Help** will display additional help in separate menus marked with the **Supplemental Help** icon ?
- **Show shared reports from other Offices** – by default, the **Report** menu will only display reports belonging to your current office. Selecting this option will allow you to see all reports created by all offices on one menu.

Sort Options

You can set the default sort options for searches in CLIFF.



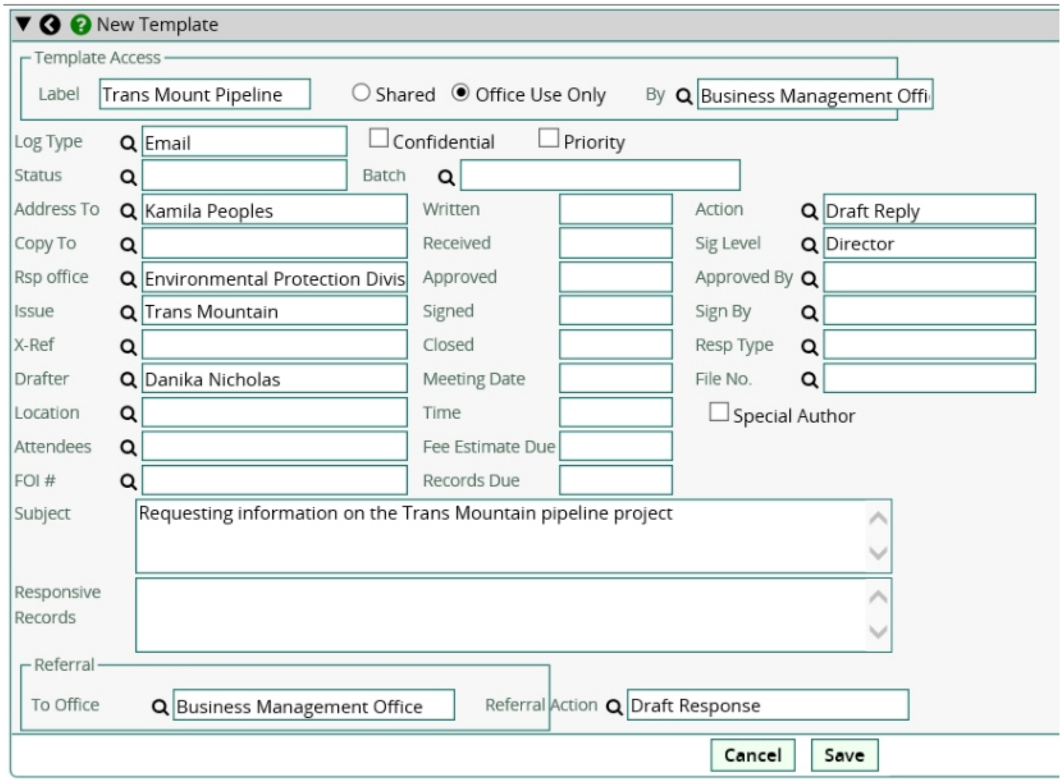
- **Default Log Sort** - Select a field as the default sort for all Log searches (Quick Search, Log Search, Keyword Search and Batch Search)
- **Default Referrals Sent Sort** – Select a field as the default sort for all searches under the **Sent** menu
- **Default Referrals Received Sort** - Select a field as the default sort for all searches under the **Received** menu
- **asc/desc** – choose whether the sort order is **ascending** (lowest to highest or alphabetically) or **descending** (highest to lowest or reverse alphabetically)

Templates

Templates allow you to pre-populate Log fields for common themes. For example, if you receive a lot of correspondence on a particular issue, you can create a template that contains all the universal data.

Creating a New Template

1. From the **Admin** tab, **Template** menu, click the **Add** icon
2. Enter a **Label** (name) for your template
3. Populate the required fields



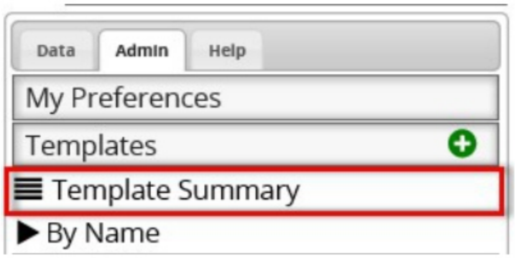
- **Templates** do not include the name and address blocks. All name and address information is stored as **Contacts** and can be used in conjunction with a Log template to populate the rest of the Log fields.
- Remember that all fields displayed on the template may not be visible on your Log form, if you have selected a **Log Type** that hides some CLIFF fields.
- If you select **Office Use Only** and select your office, only users in your CLIFF office can view and use your template. If you toggle to **Shared**, all CLIFF users will have the option to use this template
- Entering data in the **Referral** section of the template will populate those fields when you create the first Referral

5. Click **Save**

Editing a Template

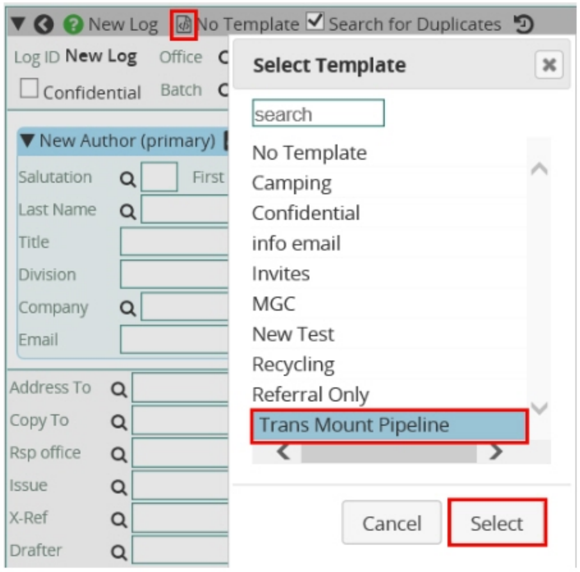
1. From the **Admin** tab, **Template** menu, click the name of the template to open the template window
2. Make any required changes
3. Click **Save**

Note that the **Template Summary** will display a summary of the templates for your office:



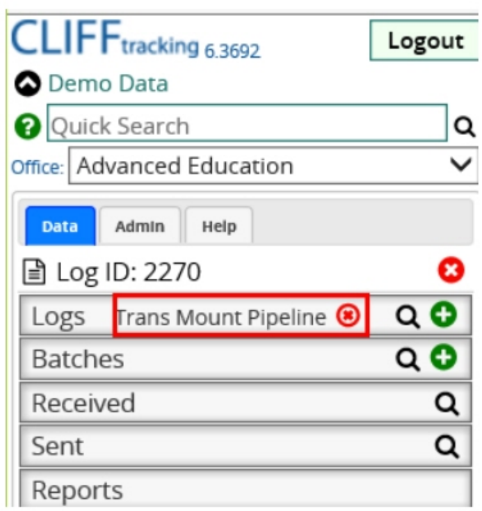
Using a Template

1. From the **New Log** screen, click the **Template** icon



2. Click to select a template
3. Click **Select**
4. To undo the template before the Log is saved, click the template icon again and click **No Template**

When you create a Log with a template, once you click the **Save** or **Update** button, the main menu will update to display the template name on the **Logs** menu.



You can continue to create Logs with template, or you can click the Cancel icon to turn off the template before creating the next Log or batch member.

Support

If your questions cannot be answered by this guide or by online help, please direct any requests for support to your Correspondence Office. If they cannot resolve the issue, they will report it to AKTIV Software for resolution. Please do not call 7-7000 to report CLIFF issues.