



# CLIFF 6 User Guide

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AKTIV Software Corporation

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## 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 reenter 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:



**Error**

This Account is already logged in. Multiple connections are not allowed.

Organization

Username

Password

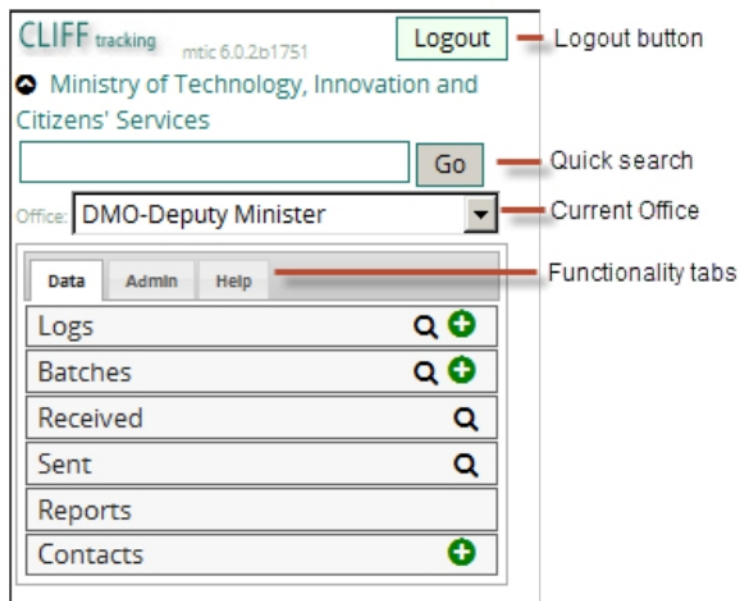
☒ Cancel Other Connection

**Log In**

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

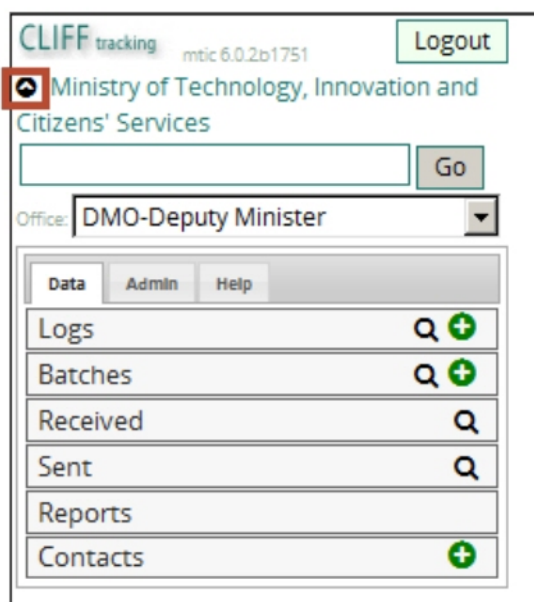
## Main Screen

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:



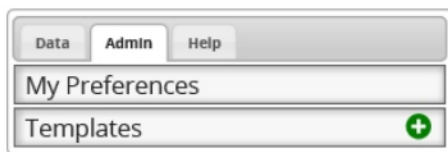
## CLIFF Menu

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

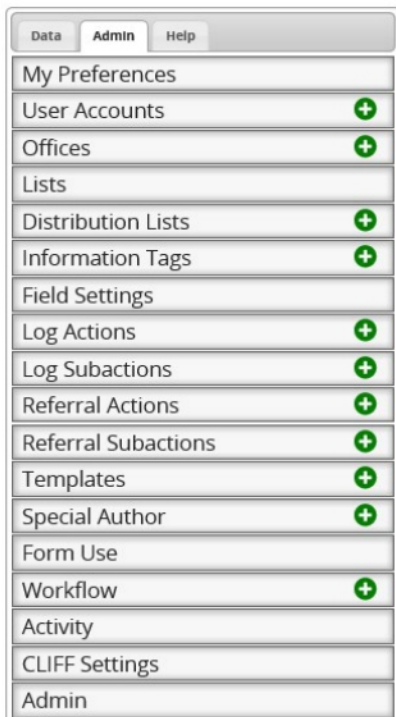
**Data** tab: for accessing and modifying data:



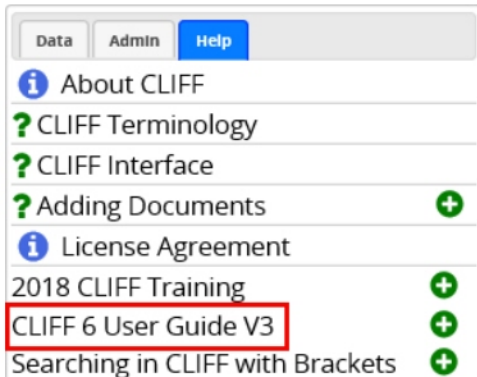
**Admin** tab: for configuring personal settings and application settings (menu will depend on your access permissions). Most users will only see **My Preferences** and **Templates**:



Administrators will see the full menu:



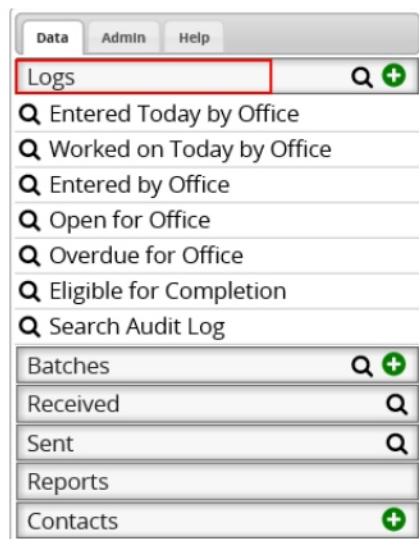
**Help** tab: provides access to CLIFF Help files, including the full CLIFF 6 User Guide:




You may also find ministry-specific help guides available.


### Using CLIFF menus

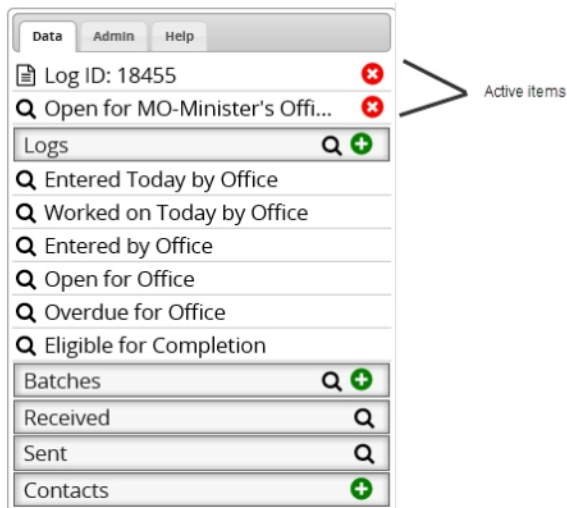
To access a function, click the appropriate menu item to view a sub-menu for that function or to view all current values for that selection. For example, clicking the **Logs** menu, will open a sub-menu that displays the quick searches for Logs:



**\*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)

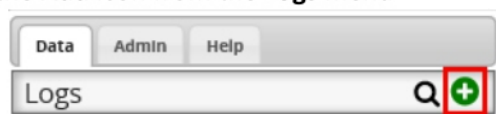
- To search, click the  icon on the appropriate menu item (i.e. clicking the **Search** icon from the **Logs** menu will open **Log Search**, while clicking the **Search** icon on the **Batches** menu will open **Batch Search**)
- All active (open) windows or items will be displayed at the top of the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

☐ Confidential Enter By  Batch

---

▼ New Author (primary)

Salutation <input type="text"/>	First Name <input type="text"/>	Type <input type="text"/>
Last Name <input type="text"/>	Address <input type="text"/>	
Title <input type="text"/>	<input type="text"/>	
Division <input type="text"/>	City <input type="text"/>	Province <input type="text"/>
Company <input type="text"/>	Country <input type="text"/>	Postal <input type="text"/>
Email <input type="text"/>	Phone <input type="text"/>	Cell <input type="text"/>

---

Address To <input type="text"/>	Written <input type="text"/>	Action <input type="text"/>
Copy To <input type="text"/>	Received <input type="text" value="2016/11/04"/>	Sub-Action <input type="text"/>
Rsp office <input type="text"/>	Due <input type="text"/>	Approved By <input type="text"/>
Issue <input type="text"/>	Approved <input type="text"/>	Sign By <input type="text"/>
X-Ref <input type="text"/>	Signed <input type="text"/>	Resp Type <input type="text"/>
Drafter <input type="text"/>	Closed <input type="text"/>	File No. <input type="text"/>

☐ Special Author

Subject

---

Log Note

Date  Time  Office

---

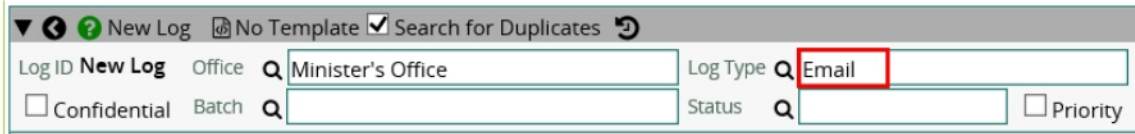
Referral

To Office  ☐ Note

Action  Assign To  ☐



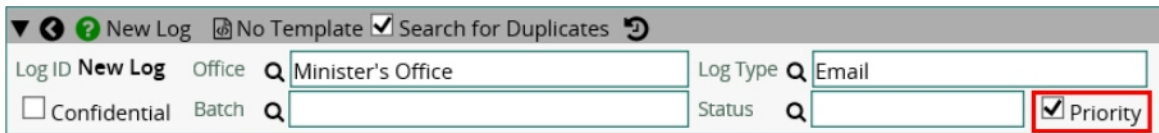
2. Select the **Log Type** from the list of values to indicate the type of assignment being tracked. This may change the new Log form (new fields may be added or fields may be removed). The last value you used will be displayed by default.



The screenshot shows the 'New Log' form with the following fields: 'Log ID' (labeled 'New Log'), 'Office' (set to 'Minister's Office'), 'Log Type' (set to 'Email'), 'Confidential' (checkbox), 'Batch' (empty), 'Status' (empty), and 'Priority' (checkbox). The 'Log Type' field is highlighted with a red box.

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**.

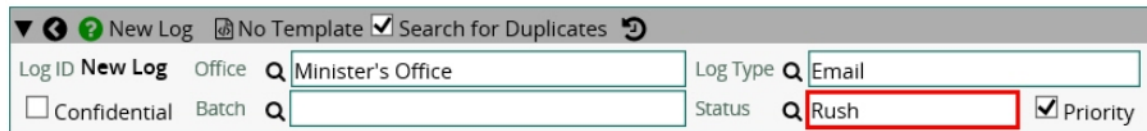
3. If this assignment is high-profile and may require more attention, check the **Priority** checkbox.



The screenshot shows the 'New Log' form with the 'Priority' checkbox checked. The 'Log Type' field is still 'Email'. The 'Priority' checkbox is highlighted with a red box.

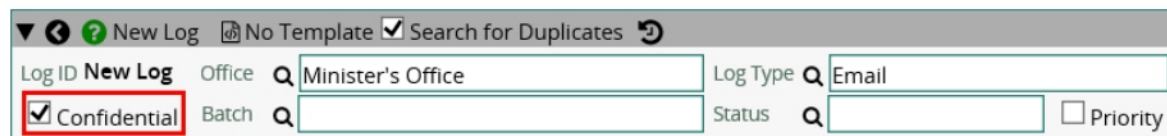
This will mark the Log as a priority in your search results list and can be used for searching.

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.



The screenshot shows the 'New Log' form with the 'Status' field set to 'Rush'. The 'Priority' checkbox is checked. The 'Status' field is highlighted with a red box.

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.



The screenshot shows the 'New Log' form with the 'Confidential' checkbox checked. The 'Status' field is still 'Rush'. The 'Confidential' checkbox is highlighted with a red box.

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

Deputy Minister's Office	Referral Slip for ID:1313	2015/03/15
<b>CONFIDENTIAL</b>		
Log Type: <b>Letter</b>	Action: <b>Advice</b>	Due: <b>2015/02/13</b>
Batch:	Subaction:	

## Adding a New Author

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

▼ New Author (primary)  

Salutation	<input type="text"/>	First Name	<input type="text"/>	Author Type	<input type="text"/>
Last Name	<input type="text"/>	Address <input type="text"/>			
Title	<input type="text"/>				
Division	<input type="text"/>	City	<input type="text"/>	Province	<input type="text"/>
Company	<input type="text"/>	Country	<input type="text"/>	Postal	<input type="text"/>
Email	<input type="text"/>	Phone	<input type="text"/>	Cell	<input type="text"/>

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 correspondence, 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.

Salutation	<input type="text"/>	First Name	Frank	Author Type	Private Citizen
Last Name	Smith	Address 1245 East Hamton Rd			
Title	<input type="text"/>				
Division	<input type="text"/>	City	Prince George	Province	BC
Company	<input type="text"/>	Country	<input type="text"/>	Postal	V1U 2C4
Email	fsmith@telus.net	Phone	(250) 881-2248	Cell	<input type="text"/>

- 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.


Salutation	<input type="text"/>	First Name	<input type="text" value="Michael"/>	Type	<input type="text" value="BN Contact"/>
Last Name	<input type="text" value="Chast"/>	Title	<input type="text" value="Exec Director"/>		
Division	<input type="text" value="Financial Services Branch"/>			Email	<input type="text" value="michael.chast@gov.bc.ca"/>
Company	<input type="text" value="Ministry of Finance"/>	Phone	<input type="text" value="(250) 912-8547"/>	Cell	<input type="text"/>

- 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.
- 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.
- 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).

▼ New Author (primary)  

Salutation	<input type="text"/>	First Name	<input type="text"/>
Last Name	<input type="text"/>	Title	<input type="text"/>
Division	<input type="text"/>		
Company	<input type="text"/>	Email	<input type="text"/>

- 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:

Select Last Name 



Jones, Jimi

Jones,

Marsh, John


Snow, Jon

<

>

Cancel

Select

- 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.

Open for CLIFF Office [120]						
	!↕	ID↕	Author↕		Subj	
<input type="checkbox"/>	1		2807	Martin, John BC Liberal MLA, Chilliwack		training
<input type="checkbox"/>	1		2787	Luther, Lex Global Domination		Needs access to Cana addresses for ...
<input type="checkbox"/>	2		2806	McCutcheon, Claire AKTIV Software		Search for artifacts on

## 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.

▼ Private Citizen: Frank Smith

Salutation
First Name
Frank
Author Type
Private Citizen

Last Name
Smith
Address

Title

Division
City
Province

Company
Country
Postal

Email
fsmith@telus.net
Phone
(250) 881-2248
Cell

▼ Private Citizen: Sharon Smith (secondary)

Salutation
First Name
Sharon
Author Type
Private Citizen

Last Name
Smith
Address

Title

Division
City
Province

Company
Country
Postal

Email
sharons@telus.net
Phone
(250) 858-6841
Cell

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.

▼ Private Citizen: Sharon Smith (secondary)

## 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.

▼ New Author (primary)

Salutation
First Name
Frank
Author Type
Private Citizen

Last Name
Smith
Address

Title

Division
City
Province

Company
Country
Postal


Email
fsmith@telus.net
Phone
Cell

? Potential Duplicate Logs

ID	Author	Company	Subject	Action	Due	Written	Received
2261	Smith, Frank		Access to camping	Approval	2018/01/16	12 2017/12/27	2017/12/27

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).

Potential Duplicate Logs

Search for duplicate logs using:

First Name

Frank

Last Name

Smith

Company

Date Written

Cancel

Search

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

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

10:42:10

Office

CLIFF Office

## 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

Address To

Copy To

- 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.

**Select Address To** ✕

✕

- Alejandro Obrien
- Jacoby Keller
- Jada Woodruff
- Jane McIntosh
- Jaqueline Meadows
- Kathy Jarvis

< >

Cancel Select

- 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.

**Select Issue** ✕

- Abuse of seniors
- Acute Care
- Adult day programs
- Advisory Council
- Advocacy
- Affordable Housing
- Aging Information & Referral
- Appropriate Housing
- Archaeology
- BC Ferries - Gold CareCard
- BC housing
- BCTS

Cancel Select

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

Issue

- 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.

A screenshot of a form field labeled 'Address To'. To the right of the label is a magnifying glass icon. The text 'cha' is entered into the input field.

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

A screenshot of a form field labeled 'Address To'. To the right of the label is a magnifying glass icon. The text 'Charlotte Mcfarland' is loaded into the input field.

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

A screenshot of a 'Select Address To' dialog box. On the left is a table with fields: Address To, Copy To, Rsp office, Issue, X-Ref, Drafter, and Subject. Each field has a magnifying glass icon and a small dropdown arrow. The 'Address To' field is selected, and its dropdown arrow is clicked, showing a list of matches: 'Charlotte Mcfarland' (highlighted) and 'Cheyanne Burkett'. Below the list are 'Cancel' and 'Select' buttons.

- 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.



The screenshot shows a software interface with a 'Select Issue' dialog box open. The dialog has a search bar and a list of issues. The background form has several fields: Last Name, Title, Division, Company, Email, Address To, Copy To, Rsp office (highlighted with a red box and containing 'Transportation'), Issue, X-Ref, Drafter, Subject, Log Note, Date (2016/01/05), and Time (19:31:21).

- 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**:

The screenshot shows a software interface with a form. The form has fields for Written, Received (2015/02/22), Closed, Action (Info/File), and Sub-Action.

## Common Data Entry Fields

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

### Assignment Details

Address To	Q Charlotte Mcfarland
Copy To	Q Milo Dupree
Rsp office	Q Transportation
Issue	Q Public Transit;Seniors transp
X-Ref	Q 1313
Drafter	Q Braelyn Shaffer

- **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	2017/12/27
Received	2017/12/29
Due	2018/01/18
Approved	
Signed	
Closed	

**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	Q	Draft Reply
Sig Level	Q	Minister
Approved By	Q	
Sign By	Q	
Resp Type	Q	
File No.	Q	
<input type="checkbox"/> Special Author		

**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”).

Subject	Hoping to see government funding to expand public transportation to Vancouver area ski hills to encourage more outdoor exercise for seniors.
---------	--

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.

Log Note			
Date	2017/12/29	Time	12:29:17
Office	CLIFF Office		
Frank phoned to confirm we had received his email. Would like to receive a response from the Minister.			

## Adding the First Referral

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

Referral				
To Office	Q	<input type="text"/>	<input checked="" type="checkbox"/> Note	<input type="text"/>
Action	Q	<input type="text"/>	Assign To	Q <input type="text"/> <input type="checkbox"/>
Status	Pending <input type="button" value="v"/>			

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:

▼ ? New Log No Template ☒ Search for Duplicates ↺

Log ID **New Log** Office  Log Type   
☐ Confidential Batch  Status  ☒ Priority

▼ New Author (primary) +

Salutation  First Name  Author Type   
Last Name  Address   
Title   
Division  City  Province   
Company  Country  Postal   
Email  Phone  Cell

Address To  Written  Action   
Copy To  Received  Sig Level   
Rsp office  Due  Approved By   
Issue  Approved  Sign By   
X-Ref  Signed  Resp Type   
Drafter  Closed  File No.   
☐ Special Author

Subject

Log Note  
Date  Time  Office

Referral  
To Office  ☐ Note   
Action  Assign To  ☐  
Status

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

▼ ? Log Notes +			
2016/05/21	CLIFF Office	Letter also requests a meeting with the Minister. EA to call Alize Garrett to discuss possible meeting dates. <small>Last updated on 2016/05/31 11:52:58 by cmccutch [CLIFF Office]</small>	

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

▼ ? Log Notes +			
Date	2016/05/31	Time	11:54:21
Office	Q	Minister's Office	
<div>Discussed a possible meeting with the Minister. Alize agreed to wait for written response to email before pursuing a meeting date.</div>			
<div>Cancel Save</div>			

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.

▼ ? Log Notes +			
2016/05/31	Minister's Office	Discussed a possible meeting with the Minister. Alize agreed to wait for written response to email before pursuing a meeting date. <small>Last updated on 2016/05/31 11:55:44 by cmccutch [Minister's Office]</small>	
2016/05/21	CLIFF Office	Letter also requests a meeting with the Minister. EA to call Alize Garrett to discuss possible meeting dates. <small>Last updated on 2016/05/31 11:52:58 by cmccutch [CLIFF Office]</small>	

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

► 1 Log Notes

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.

▼ ? Log Notes +			
2016/05/31	Minister's Office	Discussed a possible meeting with the Minister. Alize agreed to wait for written response to email before pursuing a meeting date. <small>Last updated on 2016/05/31 11:55:44 by cmccutch [Minister's Office]</small>	
2016/05/21	CLIFF Office	Letter also requests a meeting with the Minister. EA to call Alize Garrett to discuss possible meeting dates. <small>Last updated on 2016/05/31 11:52:58 by cmccutch [CLIFF Office]</small>	

## 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

▼ ? Log Attachments  							
Title	Type	Version	Approved	Approved By	Added By	Last Update	

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

Title

2262 Frank Smith

Share

File

C:\Users\clair\_000\Desktop\Presentation Files\Sample Er 

Browse...

Type

Incoming

Approved By

Date Approved

Note

Cancel

Save

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

Title

2262 Frank Smith Final

☐ Share

File

C:\Users\clair\_000\Desktop\Presentation Files\Sample W 

Browse...

Type

Final Response

Approved By

Cheyenne Burkett

Date Approved

2017/12/29

Note

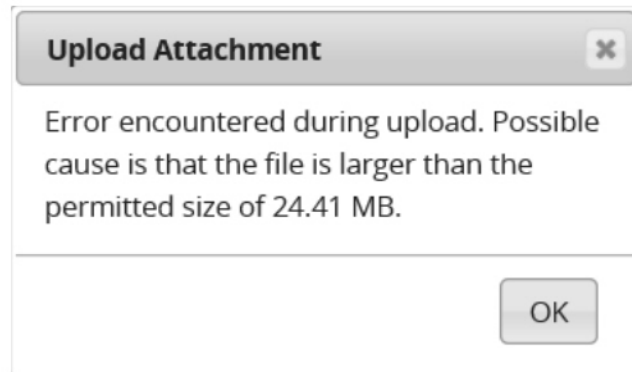
Cancel

Save

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 ▼	
👁 👤	<a href="#">2262 Frank Smith Final</a>	1	17 KB	Final Response	2017/12/29	Cheyenne Burkett	cmccutch	2017/12/30	🗑
👁 👤	<a href="#">2262 Frank Smith</a>	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 -.

The screenshot shows a user interface for managing attachments. It contains three identical blocks, each with the following fields:

- Title:** A text input field.
- File:** A file selection area with a "Browse..." button.
- Type:** A dropdown menu.
- Approved By:** A dropdown menu.
- Date Approved:** A date input field.
- Note:** A large text area with scrollbars.

The first two blocks have a red minus icon in the top left corner, and the third block has a green plus icon. At the bottom right, there are "Cancel" and "Save" buttons.

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

Log Attachments 				
Title	File Name	Version	Added By	Last Update

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

The screenshot shows the same attachment management interface, but with one block filled out. The fields are as follows:

- Title:** Response Email
- Contents:**



From: Wendy Writer  
 Sent: May 31, 2016  
 To: Paula Public  
 Subject: Document Requested

Thank you for your email. I have attached the documents you requested in your email of May 21, 2016. Please contact me directly if you require additional information from the ministry.
- Type:** Final Response
- Approved By:** Jeffery Olson
- Date Approved:** 2016/5/31

The "Cancel" and "Save" buttons are at the bottom right.

## 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**:

▼ ? Log Attachments + 	
	Title ↕
 	Paul Jones email attachment
  	Paul Jones Response
  	Paul Jones

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.

- 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)

Title	Grouse Mountain Public Transportation Alize Garrett		<input type="checkbox"/> Share
File	grouse mountain public transportation alize garrett.msg		Version 2
Upload File	C:\Users\clair_000\Desktop\Grouse M	<input type="button" value="Browse..."/>	<input checked="" type="radio"/> New Version <input type="radio"/> Replacement
Type	<input type="text" value="Draft"/>		
Approved By	<input type="text" value="Clark Ivey"/>	Date Approved	<input type="text" value="2016/05/30"/>
Note	<div></div>		
<input type="button" value="Delete"/>		<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

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

▼ ? Log Attachments + 📎								
	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.

▼ ? Log Attachments + 📎 🔍 search attachments 🔍								
	Title ↕	Version	Size	Type	Approved	Approved By	Last Update By	Last Update ▾

### Adding Additional Referrals

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

- 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:

<div> <div>📄</div> <div>Delete</div> <div>Cancel</div> <div>Update</div> <div>Save</div> </div>									
▼ ? Log Notes +									
▶ 0 Log Attachments									
▼ ? Referral +									
	Referred To	Action	Due	Late	State	Active	Assign To	Status	Completed
									Received

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

From Office		Minister's Office		Reminder		Remind	
Sent		2016/11/14		Note			
To Office		Q [ ]		<input checked="" type="checkbox"/>	Reminder		Remind
Action		Q [ ]			Note		
Subaction		Q [ ]		Assign To	Q [ ]	<input type="checkbox"/>	Notify
Received				File No.	Q [ ]		
Status		Pending	▼	Due		Complete	
				Reason			
Comment							
Date	2016/11/14	Time	09:37:13	Office	Q Minister's Office		
<div></div>							

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 be checked or unchecked by default, depending on your organization's preferences.

To Office		Q [ ]	<input checked="" type="checkbox"/>
Action		Q [ ]	

If it is checked the contact(s) for the **To Office** will receive 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.

Reminder  Remind

Note

Assign To  ☒ Notify

File No.

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)

From Office  Reminder  Remind

Sent  Note

To Office  ☒ Reminder  Remind

Action  Note

Subaction  Assign To  ☒ Notify

Received  Due  File No.


Status  Complete  Reason




Comment

Date  Time  Office

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

From Office	CLIFF Office	Reminder		Remind	
Sent	2016/01/05	Note			
Referral is Active and due in 3 days					
To Office	CLIFF Office	Reminder		Remind	
Action	Reply	Note			
Subaction		Assign To		<input type="checkbox"/> Notify	
Received		Due	2016/01/08	File No.	
Status	Pending	Complete		Reason	

- 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

From Office	CLIFF Office	Reminder		Remind	
Sent	2015/12/01	Note			
Referral is Pending and due in 10 days					
To Office	Deputy Minister's Office	<input checked="" type="checkbox"/>	Reminder		Remind
Action	Reply	Note			
Subaction		Assign To	Bob	<input type="checkbox"/> Notify	
Received	2015/12/01	Due	2015/12/21	File No.	
Status	Accepted	Complete		Reason	

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.

**Referral Notification** ✕

Email notification sent to "Deputy Minister's Office".

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

▼ ? Referral Comments +	
CLIFF Office	Email notification sent to "Deputy Minister's Office". <small>Last updated on 2015/12/01 09:31:07 by cmccutch</small>

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.

▼ ? Referrals +											
	Referred To	Action	Due	Late	State	Active	Assign To	Status	Completed	Received	
✉ +	Deputy Minister's Office	Reply	2015/12/21	-8	Pending	6	Bob	Accepted		2015/12/01	🗑
✉ +	Education	Approve	2015/12/11	-2	Pending	6		Pending			🗑
✉ +	Minister's Office	Approve	2015/12/10	-1	Active	2		Pending			🗑

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

▼ ? Referrals +											
	Referred To	Action	Due	Late	State	Active	Assign To	Status	Completed	Received	
✉ +	Deputy Minister's Office	Reply	2015/12/21	-8	Pending	6	Bob	Accepted		2015/12/01	🗑

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

▼ ? Log ID: 2262 1 of 1

🗑 ↺ 🔑 ✉ 🖨

Log ID 2262 Office 🔍 CLIFF Office

☐ Confidential Batch 🔍

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.

**Email Log**

From: cmccutch [claire@clifftracking.com]

To: Deputy Minister's Office [claire@clifftracking.com] ☐ To ☐ CC ☐ BCC ☐ Clear

Additional To:

Additional CC:

Additional BCC:

Priority: ☐ High ☒ Normal ☐ Low

Subject: CLIFF ID 1843

Note:

☐ Secure Link to Log ☒ Log detail

☒ Include Log Notes

☒ Include Referrals

☒ Include Attachments

**Attachments**

☒ Grouse Mountain Public Transportation Alize Garrett (version 2)

☒ Grouse Mountain Public Transportation Alize Garrett

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).

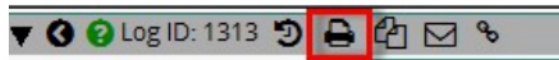
The checkbox will be checked by default but can be deselected to stop the reminder from being sent on any specific Referral. The reminder will be sent to the contact(s) for the office in the early hours of appropriate day.

From	
Office	CLIFF Office
Sent	2018/05/06
Reminder	
Note	
To	
Office	Deputy Minister's Office
Action	Draft
Subaction	
Received	
Status	Pending
Remind when	Due 2018/05/10
File No.	
Reason	

## 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

Print Log

☒ Include Log Notes
 ☒ Include Referrals
 ☒ Include Log Attachments
 ☐ Print Displayable Log Attachments

Cancel


Print

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

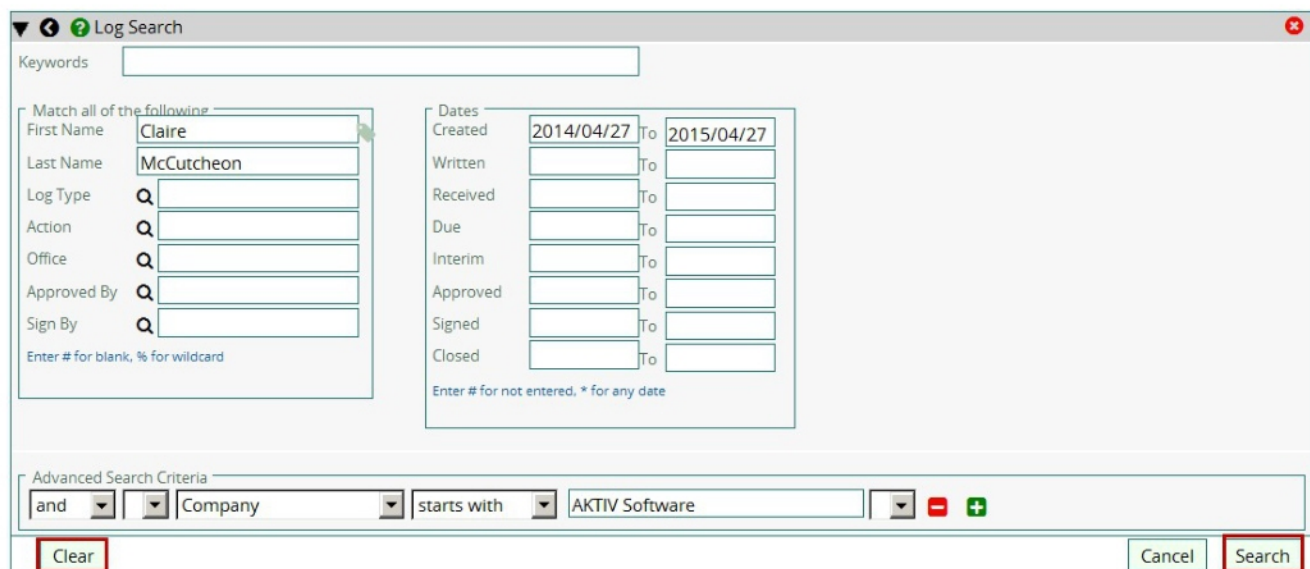
Logs can be cross-referenced with other Logs with a hyperlink to the cross-referenced Log.

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




The screenshot shows the top section of a log entry. The header bar includes a question mark icon, the text 'Log ID: 1357', and a circular arrow icon (the 'Search for History' icon) which is highlighted with a red box. Below the header bar, there are several input fields: 'Log ID 1357', 'Office' with a dropdown menu showing 'CLIFF Office', 'Log Type' with a dropdown menu showing 'Email', 'Confidential' checkbox, 'Enter By' with a dropdown menu showing 'claire', and 'Batch' with a dropdown menu.

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**



The screenshot shows the 'Log Search' window. It has a 'Keywords' field at the top. Below it, there are two main sections: 'Match all of the following' and 'Dates'. The 'Match all of the following' section contains fields for 'First Name' (filled with 'Claire'), 'Last Name' (filled with 'McCutcheon'), 'Log Type', 'Action', 'Office', 'Approved By', and 'Sign By'. The 'Dates' section contains fields for 'Created', 'Written', 'Received', 'Due', 'Interim', 'Approved', 'Signed', and 'Closed', each with a 'To' field. At the bottom, there is an 'Advanced Search Criteria' section with a dropdown menu set to 'and', a dropdown menu set to 'Company', a dropdown menu set to 'starts with', and a text field filled with 'AKTIV Software'. At the bottom right, there are three buttons: 'Clear' (highlighted with a red box), 'Cancel', and 'Search' (highlighted with a red box).

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
<input checked="" type="checkbox"/>	1290	McCutcheon, Claire	AKTIV Software	test	Briefing Note	Signature-Other	2015/02/07	-227	2015/01/31	
<input type="checkbox"/> 3	1325	Virk, Amrik	MTICS		Letter	Reply Direct	2010/03/11		2010/02/19	2012/08/28
<input type="checkbox"/> 1	1334	Simon, Paul		test	Letter	Reply Direct	2015/03/01	-212	2015/02/22	
<input type="checkbox"/> 3	1340	Abrams, Janae		Test	Letter	Reply Direct	2015/03/04	-210	2015/02/25	
<input type="checkbox"/>	1341	Abrams, Janae		Test	Letter	BN-Decision Note	2015/03/05	-209	2015/02/26	
<input checked="" type="checkbox"/> 5	1342	McCutcheon, Claire	Aktiv Software		Letter	Advice	2015/03/12		2015/03/03	2015/04/27
<input type="checkbox"/> 4	1346	McCutcheon, Claire	Aktiv Software	training	Letter	Reply Direct	2015/03/25	-195	2015/03/05	
<input type="checkbox"/>	1357	McCutcheon, Claire	AKTIV Software	test	My choice	Bullet Points	2015/03/24	-196	2015/03/17	
<input type="checkbox"/> 1	1358	McCutcheon, Claire	AKTIV Software	training	Email	Reply Direct	2015/04/09	-186	2015/03/18	
<input type="checkbox"/> 2	1360	McCutcheon, Claire	AKTIV Software		Letter	Reply Direct	2015/03/26	-194	2015/03/19	

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

Log Notes		
	CLIFF Office	<p>ID#: <a href="#">1325</a>  Date Received: 2015/02/19  Date Written: 2015/01/15  Date Closed:  Subject:</p> <p>ID#: <a href="#">1334</a>  Date Received: 2015/02/22  Date Written: 2015/02/20  Date Closed:  Subject: test</p>

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.

▼
?
Log ID: 1843








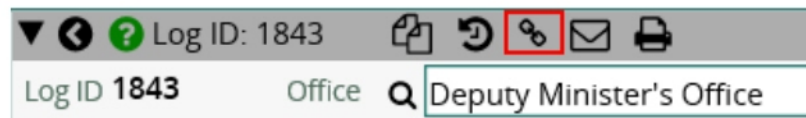
Log ID 1843
Office

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

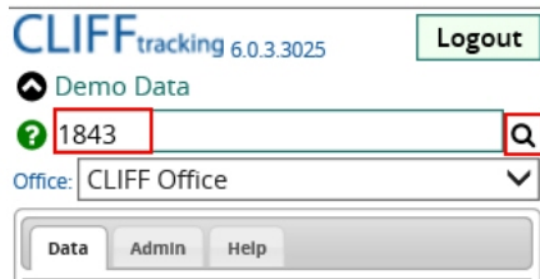
link, right-click the **Link to this Log** icon  and select **Copy Shortcut**. The link can be pasted into the other application.







## 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.

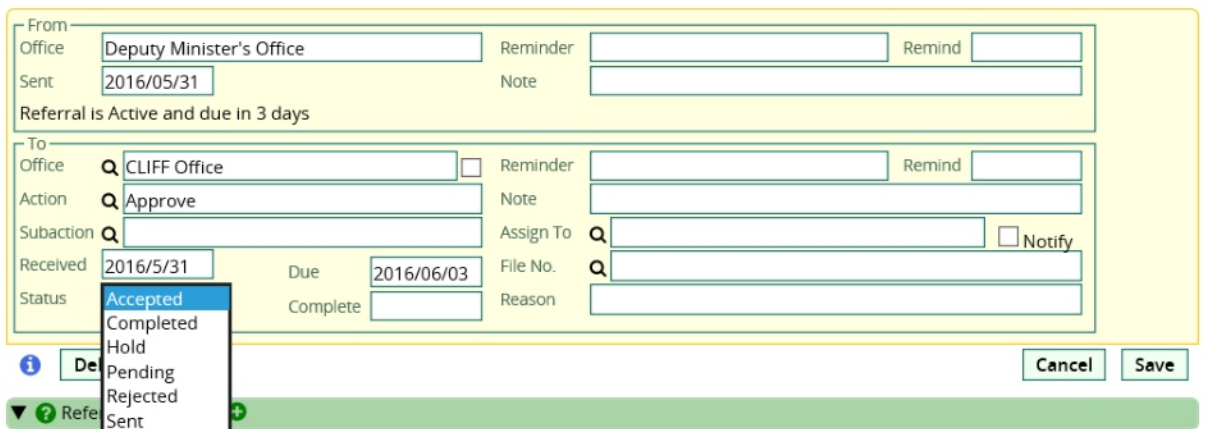
1. You will receive notification that you have been sent a Referral (usually through email) that will include the CLIFF number. To search by the CLIFF number, enter the number in the **Quick Search** and click **Enter** (from your keyboard) or click the **Search** icon .



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

Referrals								
	Referred To	Action	Due	Late	State	Active	Assign To	Status
	 Deputy Minister's Office	Draft	2016/06/10	-8	Pending	<1 day	pparker	Accepted
	 <b>CLIFF Office</b>	Approve	2016/06/03	-3	Active	<1 day		Pending

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).

To Office	<input type="text" value="CLIFF Office"/>	<input type="checkbox"/>	Reminder	<input type="text"/>	Remind	<input type="text"/>
Action	<input type="text" value="Approve"/>		Note	<input type="text"/>		
Subaction	<input type="text"/>		Assign To	<input type="text" value="Peter Parker"/>	<input type="checkbox"/>	Notify
Received	<input type="text" value="2016/5/31"/>	Due	<input type="text" value="2016/06/03"/>	File No.	<input type="text"/>	
Status	<input type="text" value="Accepted"/>	Complete	<input type="text"/>	Reason	<input type="text"/>	

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**

 **Referral Comments** 

Date  Time  Office

Peter Parker is working with Lois Lane and Bruce Wayne to approve the content.

Cancel

Save

6. Click to **Save** the Referral

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

From Office: Deputy Minister's Office    Reminder:     Remind:

Sent: 2016/05/31    Note:

Referral is Active and due in 3 days

---

To Office: Q CLIFF Office    ☐    Reminder:     Remind:

Action: Q Approve    Note:

Subaction: Q     Assign To: Q Peter Parker    ☒ Notify

Received: 2016/5/31    Due: 2016/06/03    File No.: Q

Status: Accepted ▼    Complete:     Reason:

ⓘ Delete Cancel Save

▼ ? Referral Comments +			
2016/05/31	CLIFF Office	Peter Parker is working with Lois Lane and Bruce Wayne to approve the content. <small>Last updated on 2016/05/31 14:55:48 by cmccutch [CLIFF Office]</small>	🗑

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

▼ ? Log Notes +		
2016/05/31	CLIFF Office	Peter Parker coordinating a call to Alize Garrett to confirm details before approving response. <small>Last updated on 2016/05/31 14:58:30 by cmccutch [CLIFF Office]</small>

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

From Office: Deputy Minister's Office  
Sent: 2016/05/31  
Reminder:  Remind:   
Note:   
Referral is Active and due in 3 days

To Office:  ☐ Reminder:  Remind:   
Action:  Note:   
Subaction:  Assign To:  ☒ Notify  
Received: 2016/05/31 Due: 2016/06/03 File No.:   
Status:  Complete:  Reason:

▼ ? Referral Comments +

2016/06/01	CLIFF Office	Emailed to Tony Stark to ensure approval of updated draft response. <small>Last updated on 2016/05/31 15:01:45 by cmccutch [CLIFF Office]</small>	<input type="button" value="Delete"/>
2016/05/31	CLIFF Office	Peter Parker is working with Lois Lane and Bruce Wayne to approve the content. <small>Last updated on 2016/05/31 14:55:48 by cmccutch</small>	<input type="button" value="Delete"/>

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.

To Office:  ☐ Reminder:  Remind:   
Action:  Note:   
Subaction:  Assign To:  ☒ Notify  
Received: 2016/05/31 Due: 2016/06/03 File No.:   
Status:  Complete: 2016/5/31 Reason:

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.

▼ ? Referrals					
	Referred To	Action	Due	Late	State
<input type="button" value="Add"/>	Deputy Minister's Office	Draft	2016/06/10	-8	Active
<input type="button" value="Add"/>	CLIFF Office	Approve	2016/06/03		

- 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.

► Stakeholder: Alize Garrett, Grouse Mountain Resort

Address To	Q Minister	Written	2016/05/21	Action	Q Signature-Minister
Copy To	Q Editor, Vancouver Sun	Received	2016/05/21	Sub-Action	Q Rush
Rsp office	Q Transportation	Due	2016/06/10	Approved By	Q Peter Parker
Issue	Q Seniors transportation	Approved	2016/5/31	Sign By	Q Tony Stark
X-Ref	Q	Signed	2016/5/31	Resp Type	Q Email
Drafter	Q Elise Downing	Closed	2016/5/31		

☐ Special Author

File No. Q 330-20/Grouse Mountain

Subject Seeking support for petition to Translink to improve public transportation to Grouse Mountain Resort to provide easier access for seniors wanting to use the resort.

**Delete** **Cancel** **Update** **Save**

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.

▼ Stakeholder: Alize Garrett, Grouse Mountain Resort

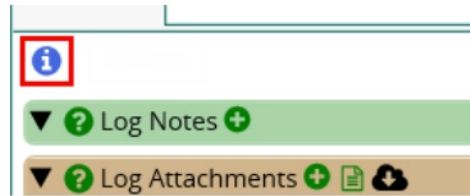
Salutation	Q	First Name	Alize	Type	Q Stakeholder		
Last Name	Q	Garrett			Address	9874 CAMPBELL PLACE	
Title	Executive Director						
Division							
Company	Q	Grouse Mountain Resort			City	Grouse Mountain	
Email				Country	Canada	Province	BC
				Postal		Phone	(604) 521-8110
				Cell			

Not all Referrals could be completed in order to close the Log.

## Viewing Log History

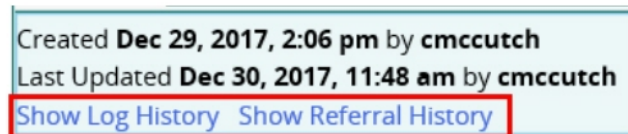
All changes to a Log are audited and can be viewed by an authorized user.

- Click the **Update Information** icon in the Log or Referral



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

- 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:

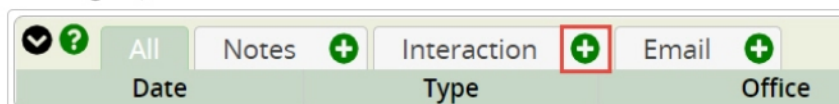
- Org** – the organization where the change was made. This will primarily display **This Org**, unless the Log originated in another ministry and was transferred to your CLIFF database.
- Date** – the date of the change/addition
- Event** – will display **Add**, **Change** or **Delete**
- Field** – the 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

- 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.

- 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.

All			
Date	Type	Office	About
2021/09/17	Interaction	CLIFF Office	Phone - Outgoing - Requesting Information

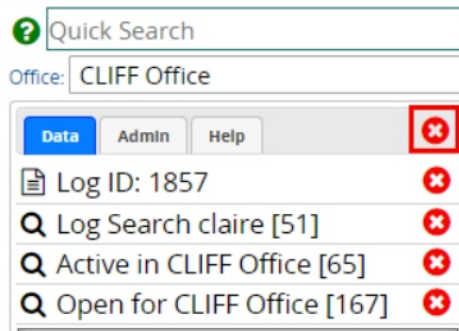
## Log and Referral Menus

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

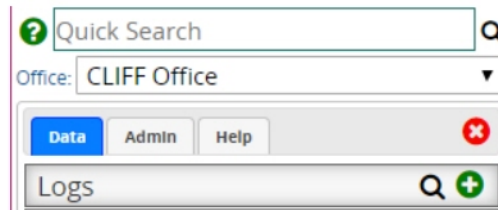
Note that when you open a Log or your search generates a list, those stay available to you at the top of the menu. You may to close all open items (Logs, search results, reports, etc.) with one click.



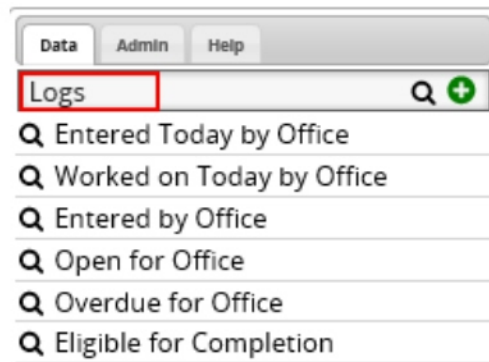
1. Click the **Close** icon at the top of the menu.



All open items are closed.

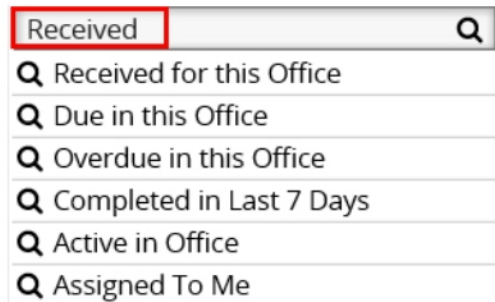


## Logs Menu



- **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

A screenshot of a software interface showing a dropdown menu. The top item, 'Received', is highlighted with a red rectangular box. Below it, a list of search options is displayed, each preceded by a magnifying glass icon: 'Received for this Office', 'Due in this Office', 'Overdue in this Office', 'Completed in Last 7 Days', 'Active in Office', and 'Assigned To Me'.

- **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

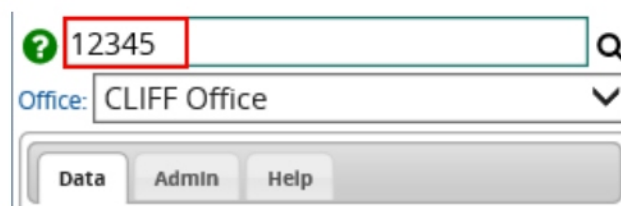
*\*This report is most frequently run as it finds all open Referrals where your office is the office currently working on the assignment.*

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.


A screenshot of a search interface. At the top, there is a search bar with a green question mark icon on the left and a magnifying glass icon on the right. The text '12345' is entered into the search bar and is highlighted with a red rectangular box. Below the search bar is a dropdown menu labeled 'Office:' with 'CLIFF Office' selected and a downward arrow icon. At the bottom, there are three buttons: 'Data', 'Admin', and 'Help'.

Or

Search bar: ? smith [Q]

Office: CLIFF Office [v]

Tabs: Data Admin Help

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.

Search bar: ? ph8812248 [Q]

Office: CLIFF Office [v]

Tabs: Data Admin Help

**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

Logs [Q+] [Data Admin Help]

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

**Log Search**

Keywords:

Match all of the following:

First Name	<input type="text"/>
Last Name	<input type="text"/>
Log Type	<input type="text"/>
Action	<input type="text"/>
Office	<input type="text" value="Minister's Office"/>
Approved By	<input type="text"/>
Sign By	<input type="text"/>

Enter # for blank, \* for wildcard

Dates:

Created	<input type="text" value="2014/02/22"/>	To	<input type="text" value="2015/02/22"/>
Written	<input type="text"/>	To	<input type="text"/>
Received	<input type="text"/>	To	<input type="text"/>
Due	<input type="text" value="2015/2/2"/>	To	<input type="text" value="2015/2/22"/>
Interim	<input type="text"/>	To	<input type="text"/>
Approved	<input type="text"/>	To	<input type="text"/>
Signed	<input type="text"/>	To	<input type="text"/>
Closed	<input type="text" value="#"/>	To	<input type="text" value="#"/>

Enter # for not entered, \* for any date

Advanced Search Criteria:

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).

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

Advanced Search Criteria

- 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.

Advanced Search Criteria

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:

**Log Search**

Keywords: **homelessness**

Match all of the following:

- First Name
- Last Name
- Company
- Author Type
- Log Type
- Action
- Subaction
- Office
- Issue

Dates:

- Created: **2016/6/25** To **2016/09/23**
- Written
- Received
- Due
- Interim
- Approved
- Signed
- Closed

Enter # for not entered, \* for any date

Advanced Search Criteria:

and ( Type (Log) is Email

or Type (Log) is Letter

Sort Results By: Log ID asc

Clear Cancel Search

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:



The screenshot shows the 'Log Search' window. The 'Keywords' field contains 'homelessness'. Under 'Match all of the following', there are input fields for First Name, Last Name, Company, Author Type, Log Type, Action, Subaction, Office, and Issue. The 'Dates' section shows 'Created' from '2016/6/25' to '2016/09/23'. The 'Advanced Search Criteria' section contains four rows of criteria, all highlighted with a red border:

and	((	Type (Log)	is	Q	Email		-	+
or	)	Type (Log)	is	Q	Letter	)	-	+
and	(	Action (Log)	is	Q	Signature-Minister		-	+
or	)	Action (Log)	is	Q	Signature-DM	)	-	+

Below the criteria, 'Sort Results By' is set to 'Log ID' with 'asc' order. At the bottom are 'Clear', 'Cancel', and 'Search' buttons.

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**.

This screenshot shows the 'Log Search' window with the 'Advanced Search Criteria' section highlighted. The criteria is set to 'and' followed by 'Date Due (Log)' and 'is after'. A red box highlights the search icon (magnifying glass) next to the criteria. A dialog box titled 'Choose Another Date Field' is open, showing a list of date fields. 'Date Closed' is selected in the list. The dialog also has a search field, 'Cancel', and 'Select' buttons.

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

Advanced Search Criteria

and		Date Due (Log)	is after	Q	^log_date_closed		-	+
-----	--	----------------	----------	---	------------------	--	---	---

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

Advanced Search Criteria

and	(	Date Due (Log)	is after	Q	^log_date_closed		-	+
or		Date Due (Log)	is	Q	^log_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%** 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 where 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:

The image shows four identical search criteria forms stacked vertically. Each form is titled 'Advanced Search Criteria' and contains a search bar with the following components: a dropdown menu set to 'and', a dropdown menu set to 'Phone', a dropdown menu set to 'is', and a text input field. The text input fields contain the following phone numbers: 2508812248, 250-881-2248, 8812248, and 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

**Log Search**

Keywords

Attachments ☒ No ☐ Yes ☐ Only

Att. Type

Match all of the following

First Name

Last Name

Company

Author Type

Log Type

Action

Subaction

Office

Issue

Enter # for blank, % for wildcard

Dates

Created  To

Written  To

Received  To

Due  To

Interim  To

Approved  To

Signed  To

Closed  To

Enter # for not entered, \* for any date

Advanced Search Criteria

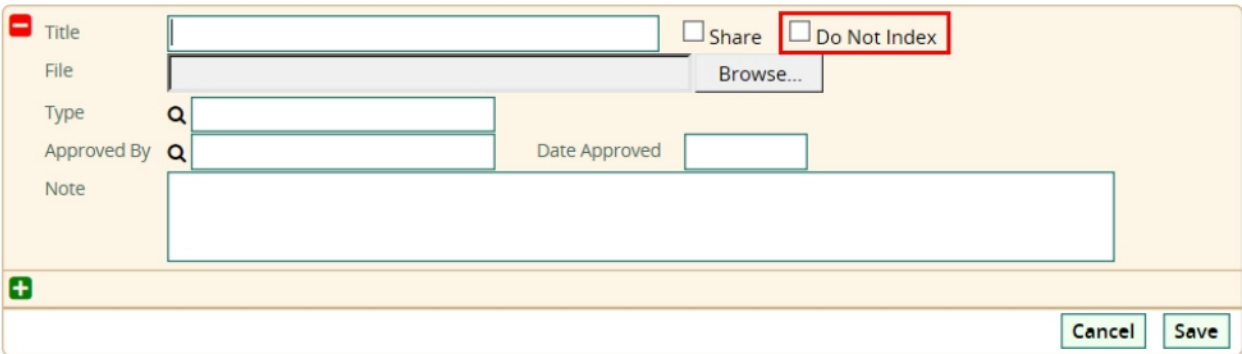
and  Choose field...  is

Sort Results By  desc

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

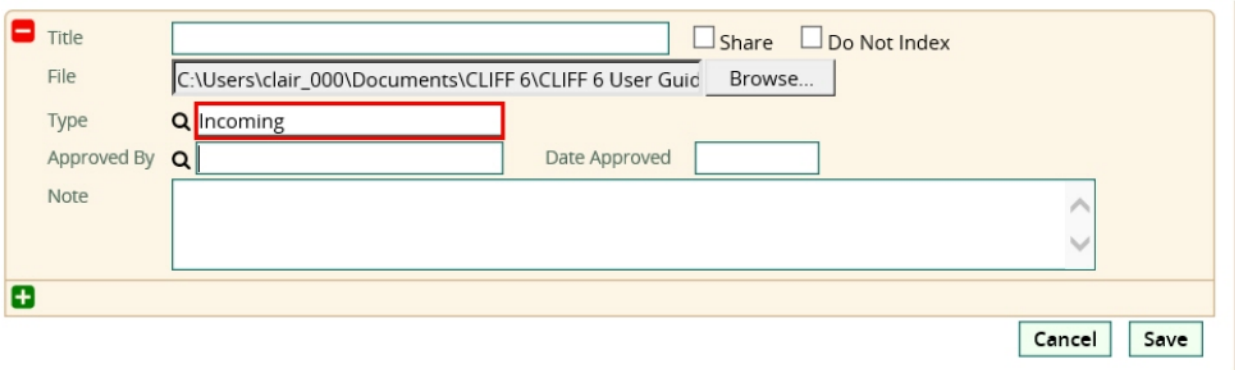
Log Attachments								
	Title	Size	Type	Version	Approved	Approved By	Added By	Last Update
	Sample Document	14.5 KB		1			cmccutch	2016/09/23
	Sample Document	14.5 KB		2			cmccutch	2016/09/23

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.

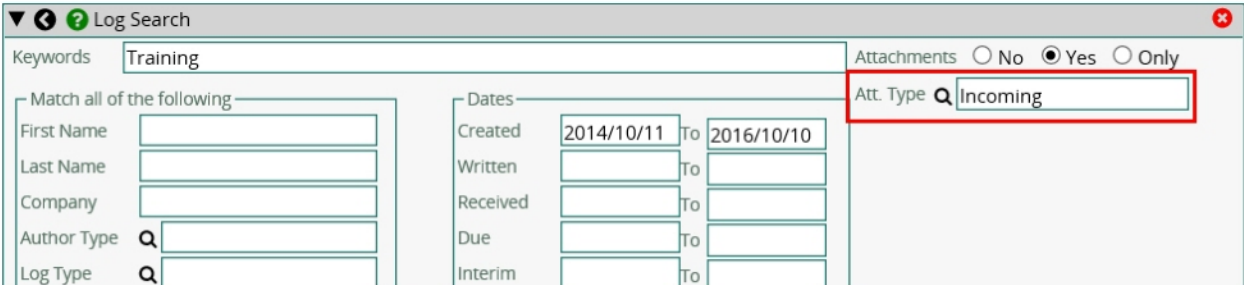


The image shows the 'Attachment' window form. It includes fields for Title, File (with a 'Browse...' button), Type, Approved By, Date Approved, and a large Note area. At the top right, there are checkboxes for 'Share' and 'Do Not Index'. The 'Do Not Index' checkbox is highlighted with a red rectangle. At the bottom right, there are 'Cancel' and 'Save' buttons.

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



This image shows the 'Attachment' window form with the 'Type' field populated with the word 'Incoming'. The 'Type' field and its value are highlighted with a red rectangle. The 'Do Not Index' checkbox is also visible at the top right. 'Cancel' and 'Save' buttons are at the bottom right.



The image shows the 'Log Search' window. It has a 'Keywords' field containing 'Training'. On the right, there are radio buttons for 'Attachments' (No, Yes, Only), with 'Yes' selected. Below this, the 'Att. Type' field is populated with 'Incoming' and is highlighted with a red rectangle. The window also features various date and text filters on the left.

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



This image shows the header bar for the 'Log Attachments' section. It includes a search field with the placeholder text 'search attachments' and a magnifying glass icon. The search field is highlighted with a red rectangle. Below the header, a table with columns like Title, Size, Type, Version, etc., is partially visible.



## 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**).

▼ ? Log Search MLA-Opposition [8] 🔍 ↺ 📄 🗑️ ⌵ 📊 ✉️ 🖨️ 📄										
	ID ^	Author ⇅	Company ⇅	Subject	Log Type ⇅	Action ⇅	Due ⇅	Days Due ⇅	Received	
<input type="checkbox"/>	1802	Garrett, Alize	Grouse Mountain Resort	Request for inquiring into abuse of seniors, repor...	Email	Reply Direct	2016/05/02	-145	2016/04/	
<input type="checkbox"/> 1 🔗	1869	Austin, Robin	NDP - Constituency - Kitimat	requesting extension to grant disbursement period ...	Email	Signature-Director	2016/09/05		2016/08/	
<input type="checkbox"/> 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:

Logs 🔍 +

- ↺ - 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:

**Download Attachments** ✕


There is a limit of 200 files that will be placed in the zip file.

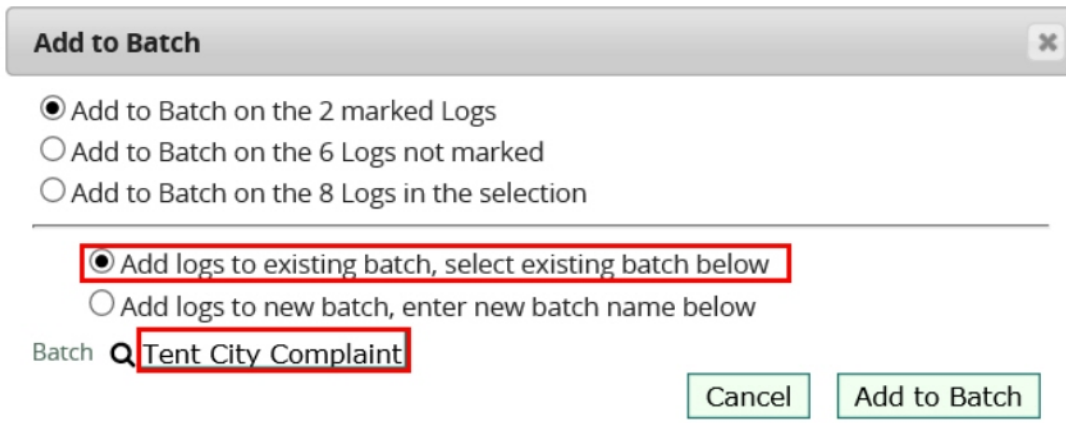
☒ Download Attachments on the 2 marked Logs  
☐ Download Attachments on the 6 Logs not marked  
☐ Download Attachments on the 8 Logs in the selection

Cancel Download

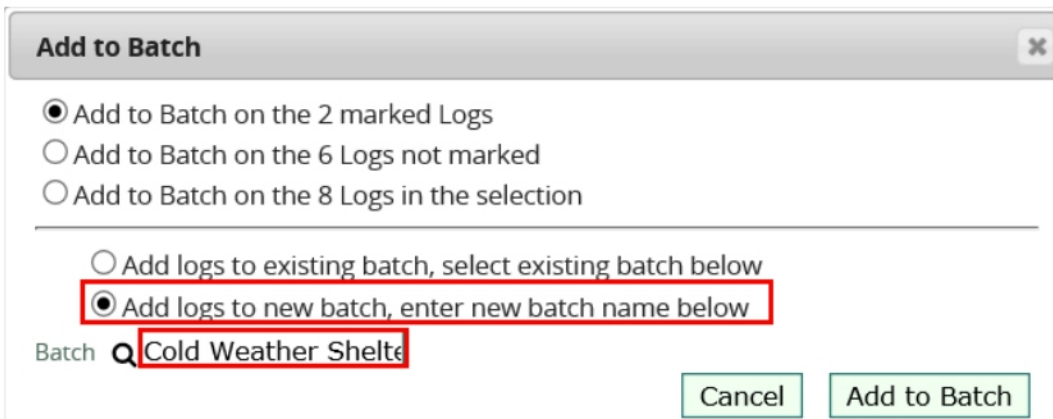
Click the **Download** button and follow your browser's instructions to save the documents




-  - 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.
  - 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:



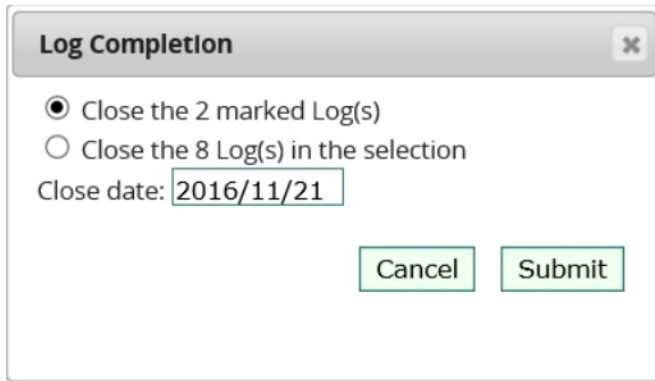
- If you are creating a new batch with marked Log(s), select **Add Logs to new batch...** and type the name of the new batch in the **Batch** field:



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 31<sup>st</sup> of the year the Logs were created to prevent these Logs from impacting your turnaround reports.

A dialog box titled "Log Completion" with a close button (X) in the top right corner. It contains two radio button options: "Close the 2 marked Log(s)" (selected) and "Close the 8 Log(s) in the selection". Below these is a text field labeled "Close date:" containing the date "2016/11/21". At the bottom are two buttons: "Cancel" and "Submit".

**Log Completion** [X]





☒ Close the 2 marked Log(s)

☐ Close the 8 Log(s) in the selection

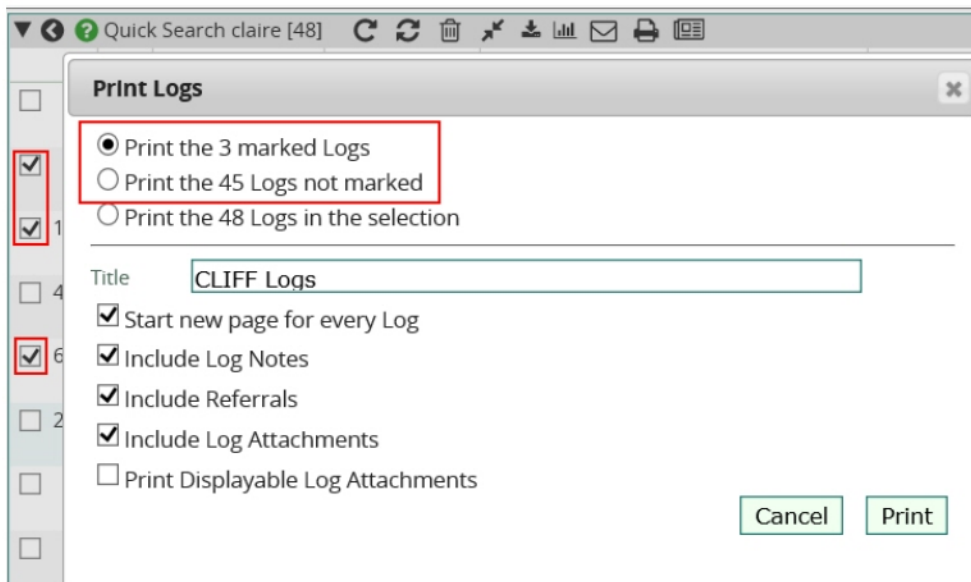
Close date: 2016/11/21

Cancel Submit


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.

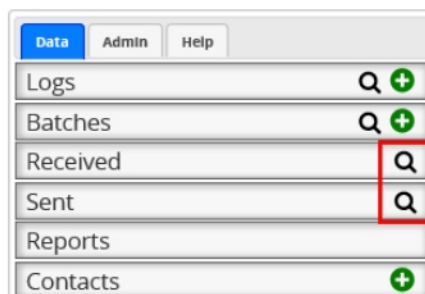


If you need to print any attachments on the Log, click the **Print Displayable Log Attachments**. This will print the contents of any attachments that can be read by the system (others may have to be opened and printing individually).

-  - 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

**Referral Search**

Keywords:

Match all of the following:

From Office:

To Office:

Action:

Status:

Enter # for blank, % for wildcard

Dates:

Sent:  To:

Received:  To:

Due:  To:

Completed:  To:

Enter # for not entered, \* for any date

Advanced Search Criteria:

and  Choose field...  is

Sort Results By:

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.

**Open for CLIFF Office [161]**

Fields:

- Action (Log)
- Address To
- Address1
- Address2
- Approved By
- Attendees
- Author
- Author Type
- Authorization
- Batch
- Batch Count

Sort: Z-A, Count, Page

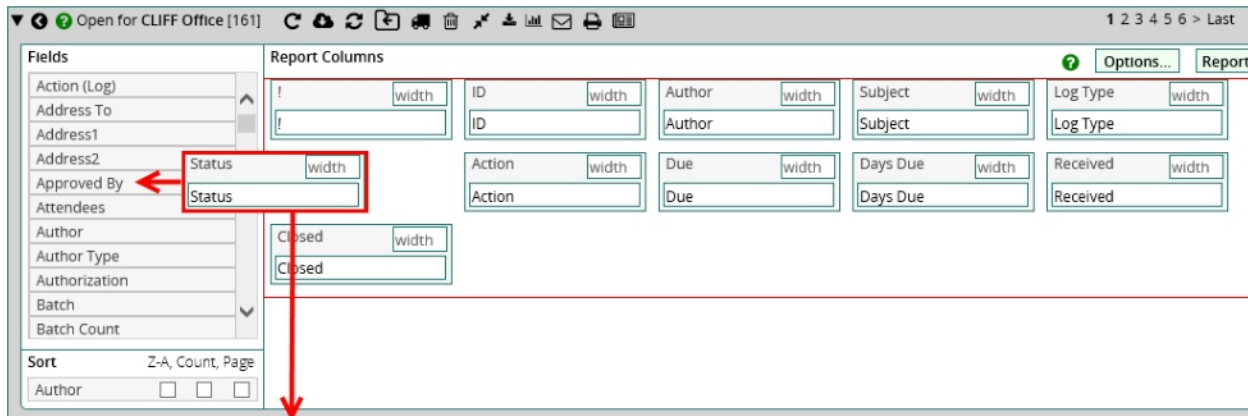
Author: ☐ ☐ ☐

Report Columns:

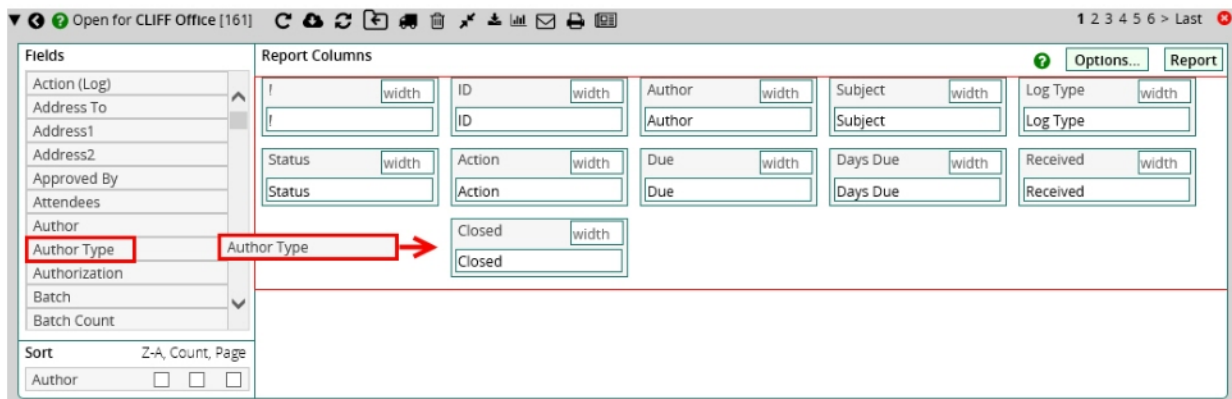
ID	ID	Author	Subject	Log Type
1923	Ackerman, Lori	City of Fort St. John	Search for artifacts on property...	Email
1924	Ackerman, Lori	City of Fort St. John	Search for artifacts on property...	Email

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

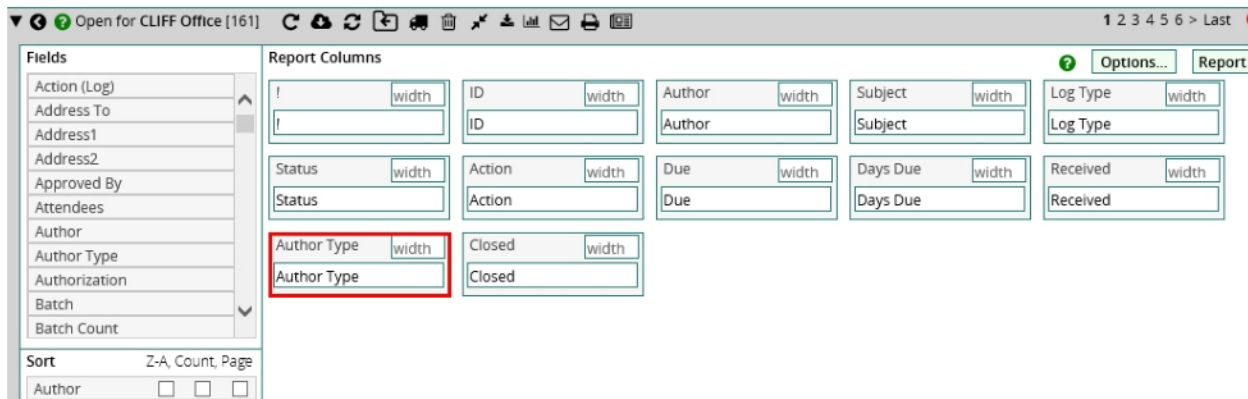
3. To remove fields, drag and drop the field boxes anywhere out of the **Report Columns** region



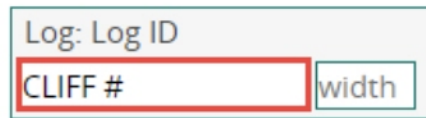
4. To add fields, drag and drop them from the list of available **Fields** on the left:



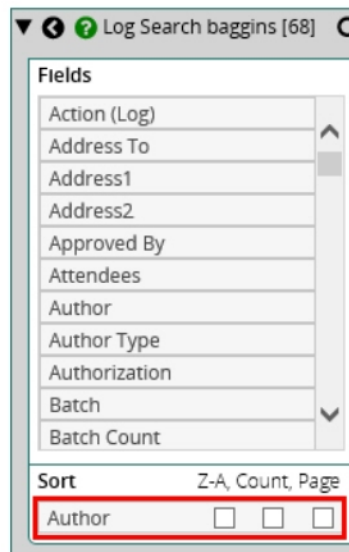
The new column will appear where it was dragged.



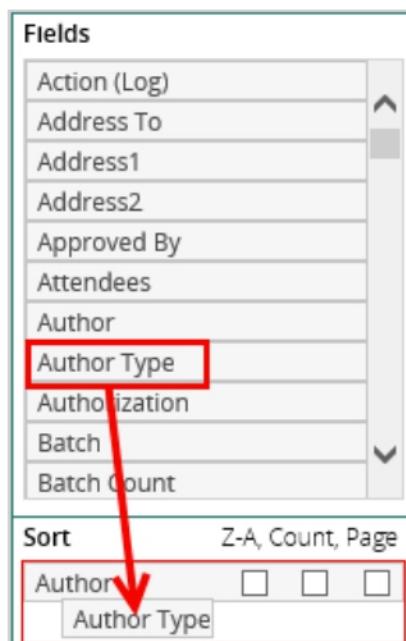
You can also relabel the column headers by changing the field name in the text box.



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.

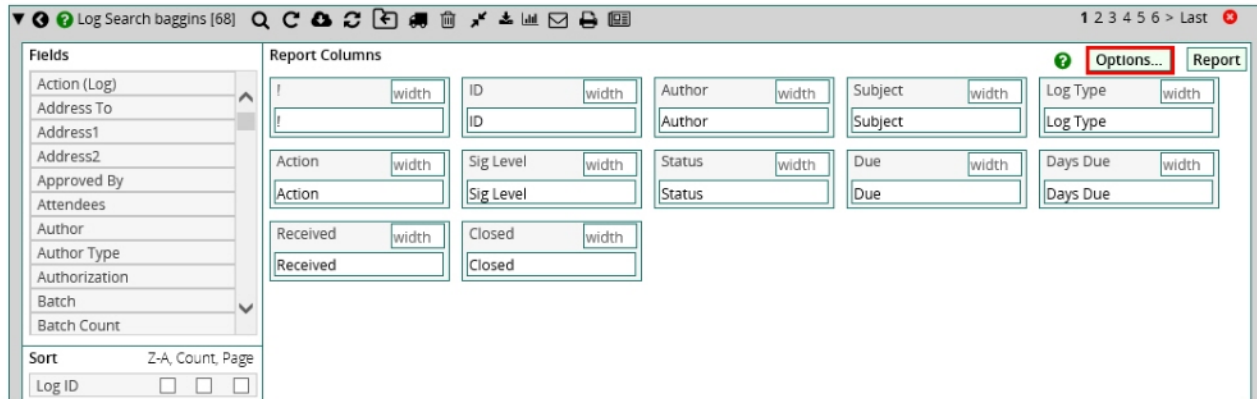




6. Sort fields are removed by dragging them out of the **Sort** region.

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.

A screenshot of the 'Report Options' dialog box. It has a title bar 'Report Columns' and buttons for '?', 'Options...', and 'Report'. The 'Format' dropdown is set to 'default'. The 'Output' dropdown is set to 'HTML'. The 'Selection' dropdown is set to 'All Results'. The 'Title' text box contains 'Open for CLIFF Office'. There are checkboxes for 'Report All Authors', 'Hide Detail', and 'Show Record Total'. The 'Owner' dropdown is set to 'CLIFF Office'. There are radio buttons for 'Save' (selected) and 'Save As' (with 'untitled-66' in the text box). There are checkboxes for 'Share Report Format With Others' and 'Allow Others to Modify Report Format'. A 'Save' button is at the bottom right.

- **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**

Options... Report

☒ Save ☐ Save As Priority Overdues

☐ Share Report Format With Others

☐ Allow Others to Modify Report Format

Owner CLIFF Office

Save

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

☐ Save ☒ Save As Non-Priority Overdue

☐ Share Report Format With Others

☐ Allow Others to Modify Report Format

Owner CLIFF Office

Save

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

☒ Save ☐ Save As Priority Overdues x

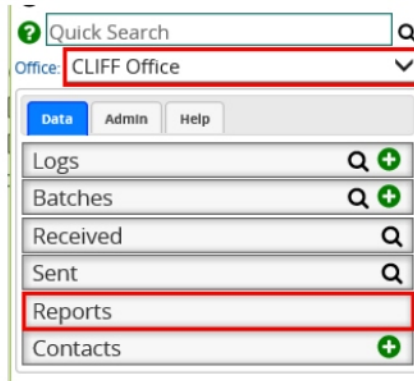
☐ Share Report Format With Others

☐ Allow Others to Modify Report Format

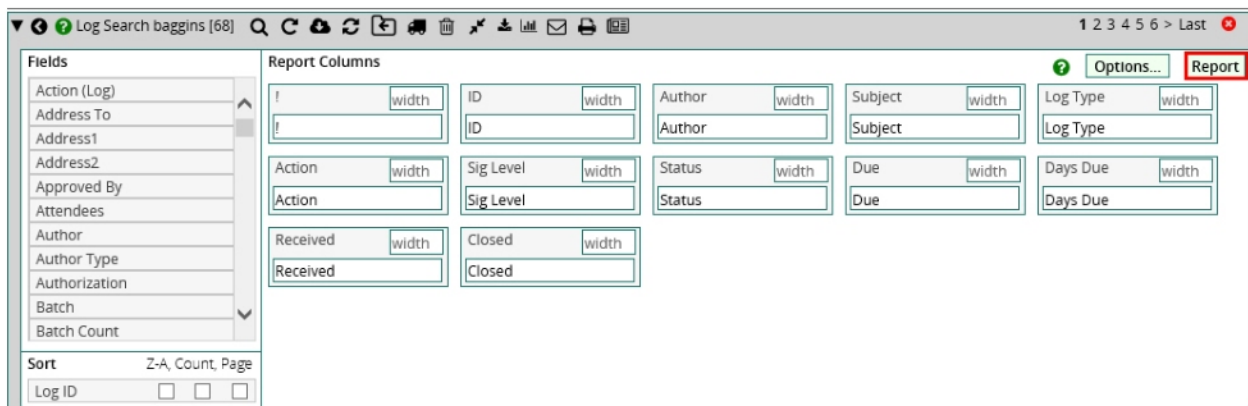
Owner CLIFF Office

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



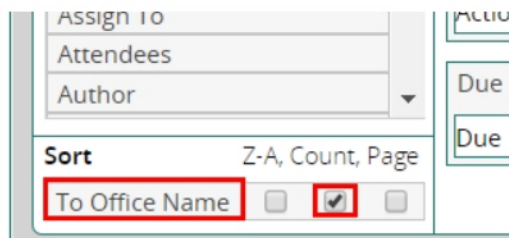
7. Click the **Report** button to generate the report



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.

2200 Rutley, Anthony  
 2284 Routley, Doug  
 Correspondence test  
 Correspondence test  
 Office  
 Office

11 Total # of outstanding Referrals

Agreement reply Active accept 2018/01/31 -95

Email Draft Active accept 2018/01/31 -95

Total # of overdue Rerrals 11

Avg

Days

Average # of days overdue -387.2

## 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:

Active Sent by CLIFF Office [75]

ID	Author	Office	Subject
<input checked="" type="checkbox"/>	507	Rivers, Addison	Minister's Office
<input type="checkbox"/>	512	West, C	
<input checked="" type="checkbox"/>	512	West, C	
<input checked="" type="checkbox"/>	512	West, C	
<input type="checkbox"/>	554	Langley	
<input type="checkbox"/>	575	Marks,	
<input type="checkbox"/>	581	Hudson	
<input type="checkbox"/>	581	Hudson	
<input type="checkbox"/>	589	Field, B	
<input checked="" type="checkbox"/>	644	Huber,	

1 2 3 4 5 6 > Last

### Email Referrals

☐ Email the 4 checked Referral(s).  
☒ Email the 71 Referral(s) that are not checked.  
☐ Email the 75 Referrals in selection.

From:

☒ Send to Assigned Offices

OR To:

CC:

BCC:

Subject:

Note:

☒ Include Referral Comments  
☒ Include Referral Attachments

### 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 be selected or manually entered.

From:

☐ Send to Assigned Offices

OR To:

CC:



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:

▼ ? Active Sent by CLIFF Office [74] 🖨️ ✎️ 📧 ↺			
ID ↕	Author ↕	Office ▲	
<input type="checkbox"/> 870	Payton, Leroy	Aboriginal Relations	De
<input type="checkbox"/> 1112	Nguyen, Jaelynn	Aboriginal Relations	Nu
<input type="checkbox"/> 771	Cline, Camille	Advanced Education	Ma
<input type="checkbox"/> 1031	Kelly, Amy	Advanced Education	Nu
<input type="checkbox"/> 984	Barker, Ashton	Advanced Education	Se
<input type="checkbox"/> 807	Harden, Adeline	Attorney General	Int
<input type="checkbox"/> 1068	Kirby, Janiyah	Attorney General	Ve
<input type="checkbox"/> 1199	Escobar, Charlie	Attorney General	Nu

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:

▼ ? Referrals +		
		Referred To
<input checked="" type="checkbox"/> 📧	+	Finance
<input checked="" type="checkbox"/> 📧	+	Advanced Education
<input type="checkbox"/>	+	CLIFF Office

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

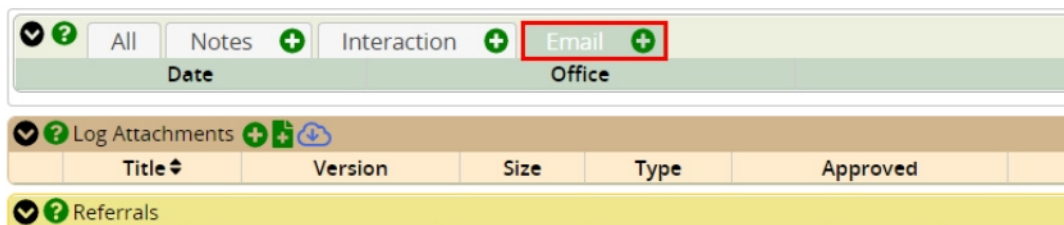
To: claire@clifftracking.com

Referral is Active and overdue by 3 days			
Log ID: <b>1342</b>	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: <b>1346</b>	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

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

Subject [ ] Message [ ] Template [Choose Template...]

Choose Template...  
 Acknowledgement  
 Confirmation

- Templates** can be created as simple text responses

Subject [Thank you for your Email] Message [Thank you for your email to the Minister. We are currently gathering information on your case and will respond as soon as possible. If you have additional information to share, please reply to this email.] Template [Acknowledgement]

Thank you,  
Correspondence Team

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

Log ID 2552 Office [CLIFF Office] Log Type [Email]

Contractor: Claire McCutcheon, AKTIV Software

Address To [Clare Hilton] Written [2019/01/07] Action [Draft Reply]

Copy To [Health Care] Received [2019/01/10] Sig Level [Minister]

Rsp office [Primary Care] Due [2019/01/30] Approved By [ ]

Issue [ ] Signed [ ] Sign By [ ]

X-Ref [ ] Closed [ ] Resp Type [ ]

Drafter [ ] File No. [ ]

eApps # [ ] No Response [ ]

Subject [Requesting information on accessing primary care in remote communities.]

Interaction/Subject

Date [2019/01/10] Time [10:33:06] Office [CLIFF Office] Created By [cmccutch]

Interaction [Email] Type [Outbound] From [CLIFF <CLIFFTST@Victoria1...>] Priority [High] [Normal] [Low]

To [A Claire McCutcheon] Claire McCutcheon [claire@aktiv.com]

CC [O FOI [claire@aktiv]] FOI [claire@aktiv.com]

BCC [U fandersen [fandense]] fandersen [fandersen@aktiv.com]

Subject [Thank you for your Email]

Message [Dear Claire McCutcheon]

Template [Confirmation]

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.

- 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)

Attachments [x] Primary Care Information Sheet [ ] Incoming Email

Cancel Send

Title	Version	Size	Type	Approved	Approved By	Last Update By	Last Update
Primary Care Information Sheet	1	17 KB	Attachment			cmccutch	2019/01/10 11:10:05
Incoming Email	1	74.5 KB	Incoming			cmccutch	2019/01/10 10:32:39

- 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 Receipt of email confirmed
			Sent

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



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

All Notes Interaction Email				
Date	Office	Interaction/Subject		
2019/01/10	CLIFF Office	Inbound	From: claire@clifftracking.com RE: CLIFF 2552:Receipt of email confirmed	Received
2019/01/10	CLIFF Office	Outbound	To: claire@aktiv.com Receipt of email confirmed	Sent

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

test.cliff.gov.bc.ca says

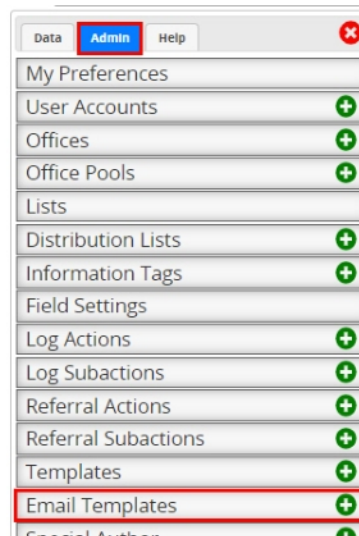
Enter the Log ID you want the email moved to:

OK Cancel

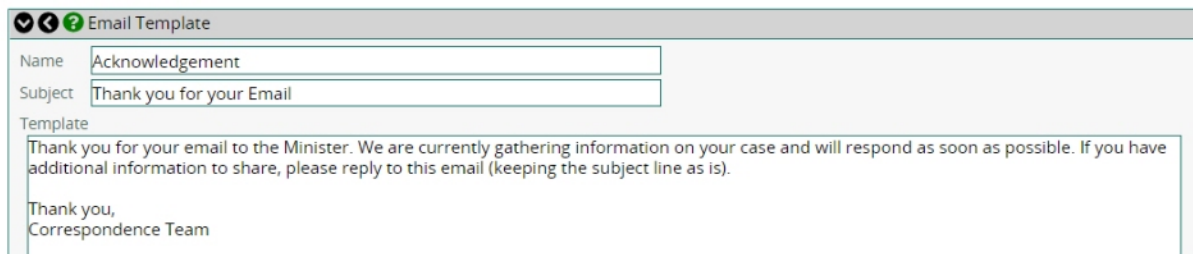
## Email Templates

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

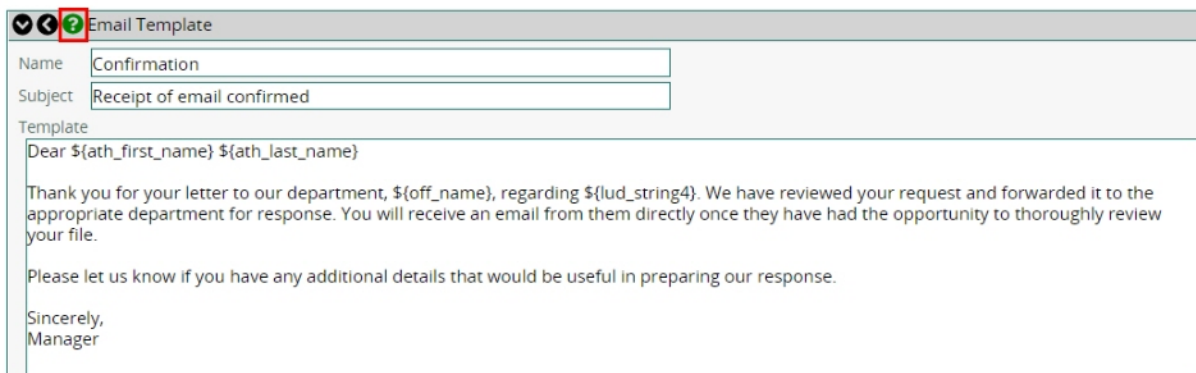


2. To create a simple text template, enter the information and save




The screenshot shows the 'Email Template' form. The 'Name' field is 'Acknowledgement' and the 'Subject' field is 'Thank you for your Email'. The 'Template' field contains the text: 'Thank you for your email to the Minister. We are currently gathering information on your case and will respond as soon as possible. If you have additional information to share, please reply to this email (keeping the subject line as is). Thank you, Correspondence Team'.

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



The screenshot shows the 'Email Template' form. The 'Name' field is 'Confirmation' and the 'Subject' field is 'Receipt of email confirmed'. The 'Template' field contains the text: 'Dear \${ath\_first\_name} \${ath\_last\_name} Thank you for your letter to our department, \${off\_name}, regarding \${lud\_string4}. 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'.

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.

Thank you for your letter to our department, CLIFF Office, regarding **\${lud\_string4}**. 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.



## 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

Send Bulk Email to Logs by Author Type

☒ Email the 3 checked Log(s).

☐ Email the 155 Log(s) that are not checked.

☐ Email the 158 Log(s) in selection.

Sending Office

CLIFF Office

From

CLIFF <CLIFFTST@Victoria1.gov>

Priority

☐ High ☒ Normal ☐ Low

☐ Send to All Authors in above selection

To

Choose Author Type...

CC

Choose Author Type...

BCC

Choose Author Type...

Subject

Message

Template

Choose Template...

Attachments

Choose Files

No file chosen

☐ Don't send emails. Just scan for errors.

Cancel

Submit

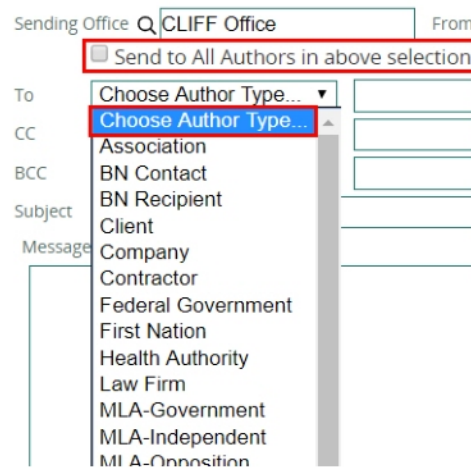
3. Emails can be sent to the authors of all Logs on the list or a selected group

- ☒ Email the 3 checked Log(s).

☐ Email the 155 Log(s) that are not checked.

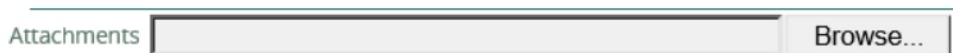
☐ Email the 158 Log(s) in selection.

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

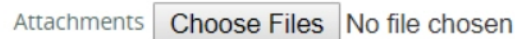


5. **Attachments** to the emails can be selected from any saved location

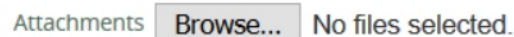
*From IE:*



*From Chrome:*



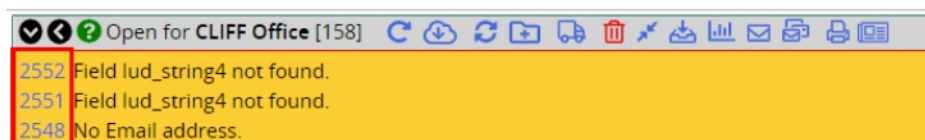
*From Firefox:*



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.

☒ Don't send emails. Just scan for errors.

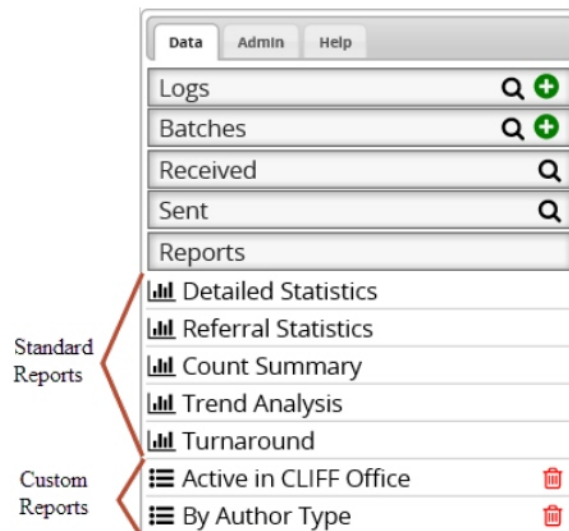
7. If any errors are found by the scan, they are listed in the main CLIFF window



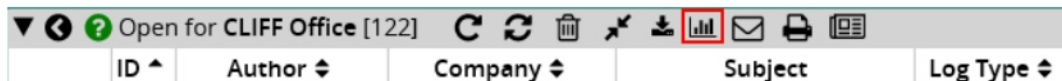
8. Click the hyperlinked **CLIFF IDs** to update the Logs and then click the **Bulk Email** icon again to regenerate the window and send the email

## Reports

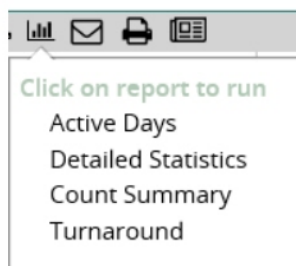
Reports are available from the **Report** menu and will display listed above any custom reports. Selecting one of the built-in reports from this list will require you to use one of the standard searches included in the report format.



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.

**Log Search**

Keywords

Match all of the following

First Name

Last Name

Log Type

Action

Office

X-Ref

Enter # for blank, % for wildcard

Dates

Created  To

Written  To

Received  To

Due  To

Interim  To

Approved  To

Signed  To

Closed  To

Enter # for not entered, \* for any date

Advanced Search Criteria

and  To Office (Ref) is  CLIFF Office

Clear Cancel Search

- From the **Statistics Report** icon, select **Active Days**

**Log Search CLIFF Office [16]**

	ID	Author	Company		Type	Action
<input type="checkbox"/> 1	1410	ADM, Andrea	Ministry of Health	Funding ap	g	BN-Decision Note
<input type="checkbox"/> 2	1324	Simon, Paul		Complaint		Reply Direct
<input type="checkbox"/> 3	1446	McCutcheon,	AKTIV Software	Mother nee		Reply Direct

Click on report to run

Active Days

Detailed Statistics

Count Summary

Turnaround

- 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.

Log Search

Keywords

Match all of the following

First Name

Last Name

Log Type

Action

Office

X-Ref

Enter # for blank, % for wildcard

Dates

Created To

Written To

Received To

Due To

Interim To

Approved To

Signed To

Closed 2015/11/1 To 2015/11/30

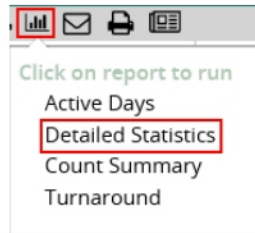
Enter # for not entered, \* for any date

Advanced Search Criteria

and To Office (Ref) is CLIFF Office

Clear Cancel Search

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
<b>MO-Minister's Office</b>		<b>370</b>	<b>371</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>33.2</b>
<b>Grand Total</b>		<b>370</b>	<b>371</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>33.2</b>

- 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

Summarize by: **Office** ☒ Show Totals ☒  
To calculate statistics, use days overdue of **30** and

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 or 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
	<b>CCU-Correspondence</b>		<b>210</b>	<b>199</b>	<b>333</b>	<b>72</b>	<b>26</b>	<b>0</b>
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

Summarize by: Office ▼ ☒ Show Totals ☒

To calculate statistics, use days overdue of 30 and

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



▼ ? Referral Statistics

Create Report for: Referrals ▼

Date Range: Last month ▼ From: 2015/11/1 To: 2015/11/30

Referral Offices

- CLIFF Office
- Correspondence Office
- Deputy Minister's Office
- Education
- Energy Mines
- Environment
- Environmental Assessment Office
- Finance
- FLNR
- Health

Available Office Pools

- Executive Programs

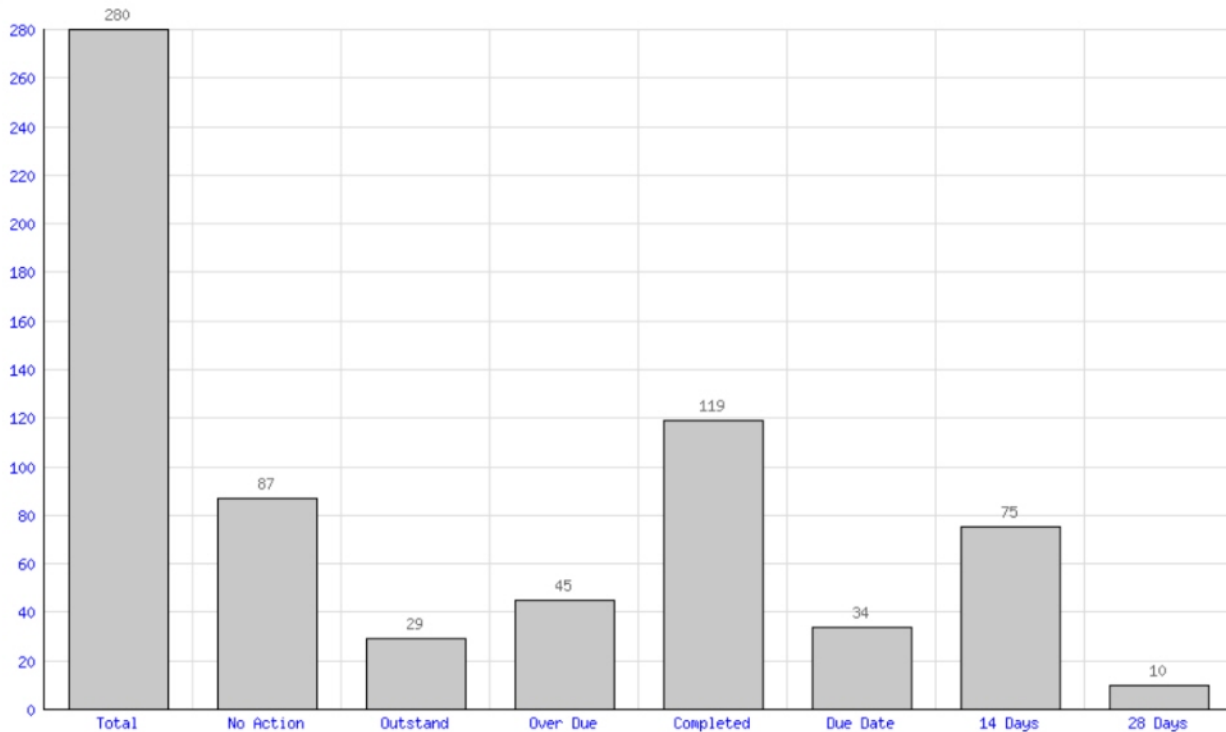
Close Stats

- 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 sent 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**

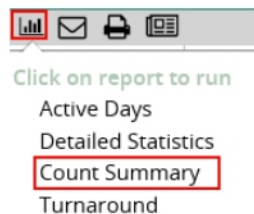
*We recommend using **Log Search** before running the report for Logs to allow the user to report on closed or signed Logs or to limit the selection to Logs referred to a certain office.*

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

The screenshot shows the 'Log Search' window with the following details:

- Keywords:** An empty text field.
- Match all of the following:** A section with fields for First Name, Last Name, Log Type, Action, Office, and X-Ref, each with a magnifying glass icon.
- Dates:** A section with fields for Created, Written, Received, Due, Interim, Approved, Signed, and Closed, each with a 'To' field.
- Advanced Search Criteria:** A section with a dropdown menu set to 'and', a dropdown menu set to 'To Office (Ref)', a dropdown menu set to 'is', a magnifying glass icon, and a text field containing 'CLIFF Office'.
- Buttons:** 'Clear', 'Cancel', and 'Search' buttons are at the bottom.

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
<b>Total</b>	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

**Trend Analysis**

Create Report for: Referrals Received

Date Range: This year From: 2015/01/1 To: 2015/12/31

Log Type:

Log Action:

Select the Offices you wish to report on

- Aboriginal Relations
- Advanced Education
- Attorney General
- BCUC
- Children and Families
- CLIFF Office
- Correspondence Office
- Deputy Minister's Office
- Education
- Energy Mines
- Environment
- Environmental Assessment Office

Available Office Pools

- Executive Programs

Data Field: Action

Close Trend Analysis

- 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									
<b>Total</b>	<b>24</b>	<b>30</b>	<b>13</b>	<b>62</b>	<b>97</b>	<b>55</b>	<b>86</b>	<b>59</b>	<b>59</b>	<b>60</b>	<b>38</b>	<b>1</b>

- 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)

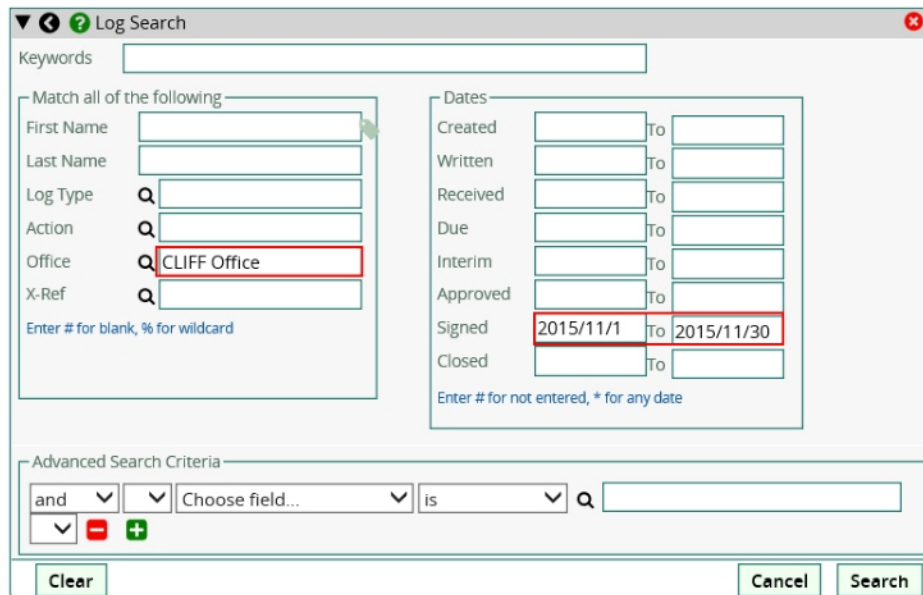
## Turnaround Report

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 or 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.

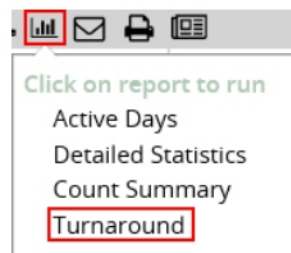
The example below will search for all Logs created by one office that were signed last month.



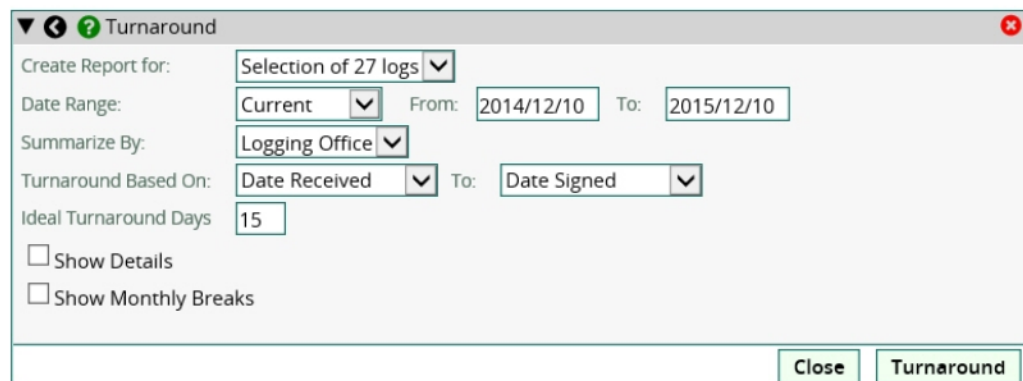
The 'Log Search' dialog box is shown with the following fields and values:

- Keywords: (empty)
- Match all of the following:
  - First Name: (empty)
  - Last Name: (empty)
  - Log Type: (empty)
  - Action: (empty)
  - Office: **CLIFF Office** (highlighted with a red box)
  - X-Ref: (empty)
- Dates:
  - Created: (empty) To (empty)
  - Written: (empty) To (empty)
  - Received: (empty) To (empty)
  - Due: (empty) To (empty)
  - Interim: (empty) To (empty)
  - Approved: (empty) To (empty)
  - Signed: **2015/11/1** To **2015/11/30** (both dates highlighted with red boxes)
  - Closed: (empty) To (empty)
- Advanced Search Criteria: (empty)
- Buttons: Clear, Cancel, Search

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



- Enter any additional parameters in the **Turnaround** window as required



The 'Turnaround' dialog box is shown with the following fields and values:

- Create Report for: Selection of 27 logs (dropdown)
- Date Range: Current (dropdown) From: 2014/12/10 To: 2015/12/10
- Summarize By: Logging Office (dropdown)
- Turnaround Based On: Date Received (dropdown) To: Date Signed (dropdown)
- Ideal Turnaround Days: 15
- Show Details: (unchecked)
- Show Monthly Breaks: (unchecked)
- Buttons: Close, Turnaround



- 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.

Turnaround Based On: Date Recei  
 Ideal Turnaround Days 15  
☐ Show Action Subtotal  
☐ Show Details  
☐ Show Monthly Breaks

- 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



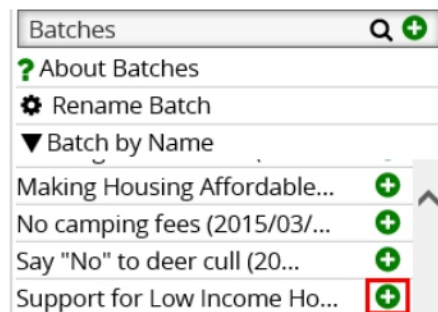
2. In the batch header enter the information pertaining to all parts of the batch

 A screenshot of the 'New Batch' form in the CLIFF application. The form has a yellow header bar with a back arrow, a question mark, and the text 'New Batch' and 'No Template'. Below the header are several input fields: 'Log ID' (set to 'New Batch'), 'Office' (set to 'CLIFF Office'), 'Log Type' (set to 'Email'), 'Confidential' (checkbox), 'Batch Type' (set to 'Issue Write-in'), 'Status' (input field), 'Priority' (checkbox), 'Batch Lock' (checkbox), 'Batch Count' (input field), and 'Batch' (set to 'Support for Low Income Housing'). Below these are more fields: 'Address To' (set to 'Minister'), 'Copy To' (set to 'Deputy Minister'), 'Rsp office' (set to 'Housing'), 'Issue' (set to 'Affordable Housing'), 'X-Ref' (input field), 'Drafter' (input field), 'Subject' (set to 'Requesting increased government funding for low-cost housing in the lower mainland and Vancouver Island.'), 'Created' (set to '2018/01/02'), 'Due' (set to '2018/01/22'), 'Action' (set to 'Draft Reply'), 'Sig Level' (set to 'Assistant Deputy Ministe'), 'Approved By' (input field), 'Sign By' (input field), 'Resp Type' (input field), and 'File No.' (input field). At the bottom right are three buttons: 'Cancel', 'Update', and 'Save'.

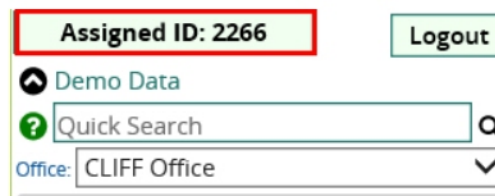
The batch header contains many of the same fields as a regular Log with a few additional fields and no author fields:

- **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

ID	Author	Subject	Log Type	Action	Sig Level	Status	Due	Days Due	Received	Closed
2263	Support for Low Income Housing	Requesting increased government funding for low-co...	Email	Draft	Assistant Deputy Minister		2018/01/22	14	2018/01/02	
2266	Beveridge, Megan	Requesting increased government funding for low-co...	Email	Draft	Assistant Deputy Minister		2018/01/22	14	2018/01/02	
2264	McKortoff, Sue	Requesting increased government funding for low-co...	Email	Draft	Assistant Deputy Minister		2018/01/22	14	2018/01/02	
2265	Neville, John	Requesting increased government funding for low-co...	Email	Draft	Assistant Deputy Minister		2018/01/22	14	2018/01/02	
2267	Bergenske, John	Requesting increased government funding for low-co...	Email	Draft	Assistant Deputy Minister		2018/01/22	14	2018/01/02	
2268	Victor, Wilfried	Requesting increased government funding for low-co...	Email	Draft	Assistant Deputy Minister		2018/01/22	14	2018/01/02	
2269	Smith, Frank	Requesting increased government funding for low-co...	Email	Draft	Assistant Deputy Minister		2018/01/22	14	2018/01/02	

- 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

Update Batch Members

Update Method:

Don't Update Members

Replace Member data

Only update Member fields if blank

Cancel

Submit

- **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



Data	Admin	Help
Logs	Q	+
Batches	Q	+
Received	Q	

## 2. Enter the required criteria

Batch Search

Keywords

Match all of the following

Batch
Log Type
Action
Office
Approved By
Sign By

Enter # for blank, % for wildcard

Dates

Created
Written
Received
Due
Interim
Approved
Signed
Closed

Enter # for not entered, \* for any date

Advanced Search Criteria

and
Choose field...
is

Sort Results By
Log ID
asc

Clear
Cancel
Search

- 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**

Advanced Search Criteria

and
Record Type
is
Regular Log

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

Advanced Search Criteria

and
Record Type
is
Batch Header

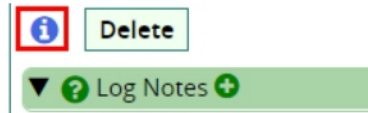
- To focus your search on either batch headers or members (but exclude regular Logs)

Advanced Search Criteria

and
Record Type
is not
Regular Log

## Accessing the Batch Header from a Member

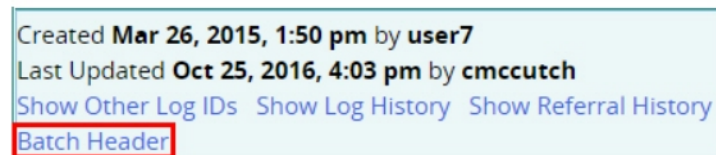
1. Click the **Additional Information** icon



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



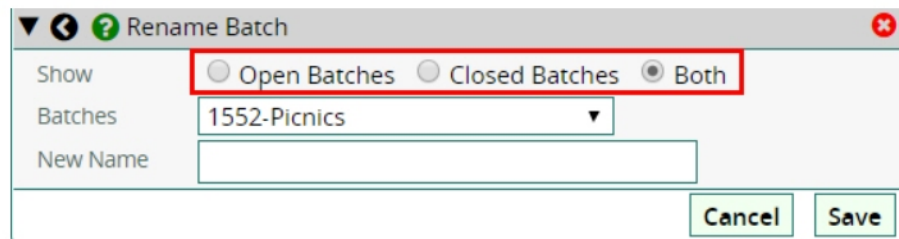
3. Click the **Batch Header** link to open and view the Header



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.



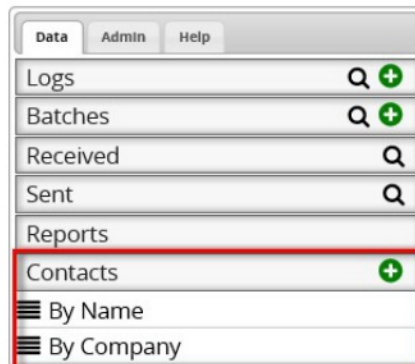
1. From the **Batch** menu, select **Rename Batch**
2. Toggle to view a list of **Open Batches**, **Closed Batches** or **Both**
3. Select the correct batch
4. Enter the **New Name**
5. Click **Save**

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




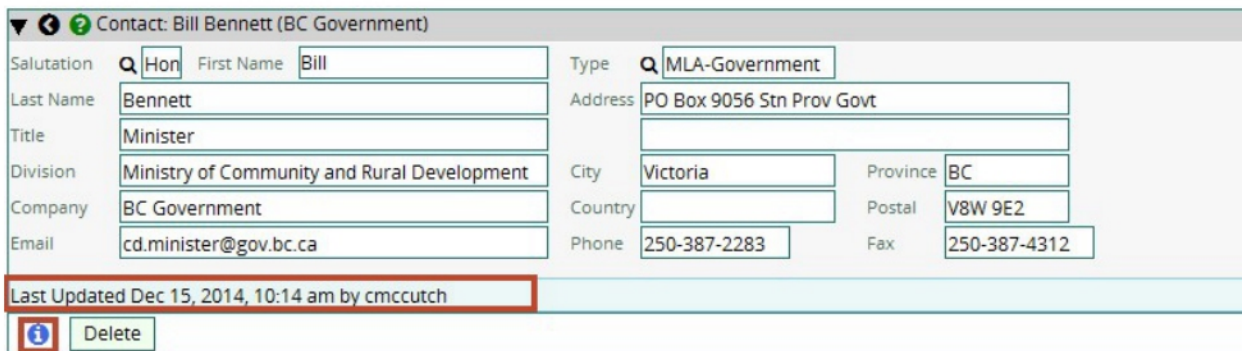
## Contacts Menu

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

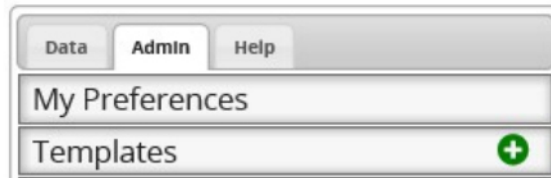
Each **Contact** includes **Audit** details which can be viewed by clicking the **Info** icon 



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

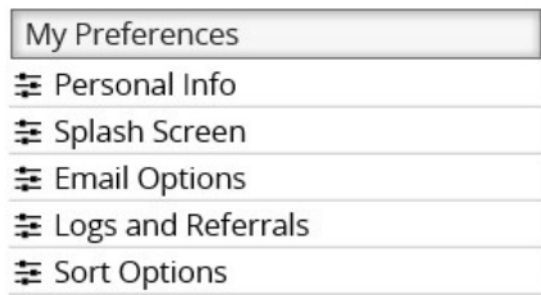
## Admin Menu

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.

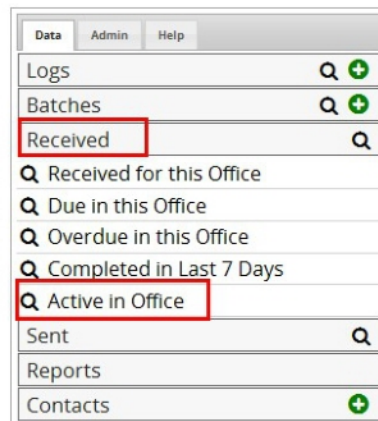
- **Default Office** – indicates which office is displayed as your current office when you Log into CLIFF. If you are finding that you are doing more work for one of your back-up offices, you may wish to change your **Default Office** (even if it's just temporary).
- **Timeout** – the timeout period 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	
<input type="checkbox"/> 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	
<input type="checkbox"/> 2174	Smith, Michael District of West Vancouver	Advanced Education	This is a training exercise - subject line.	Email	Draft	accept	sample1	2017/09/22	-72	
<input type="checkbox"/> 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

Active in Advanced Education [3]

**Fields**

- Active count
- Action (Log)
- Action (Referral)
- Active Days
- Address To
- Address1
- Address2
- Approved By
- Assign To
- Attendees
- Author

**Sort** Z-A, Count, Page

Log ID ☐ ☐ ☐

**Report Columns**

ID	ID	Author	From Office	Subject
ID	Author	From Office	Subject	
Type	Action	Status	Assign To	Due
Type	Action	Status	Assign To	Due
Days Due				
Days Due				

**Options...** **Report**

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

**Report Columns**

Format: default

Output: HTML

Selection: All Results

Title: Active in Advanced Education

☐ Hide Detail

☐ Show Record Total

☒ **Save** ☐ Save As Active Referrals x

☐ Share Report Format With Others

☐ Allow Others to Modify Report Format

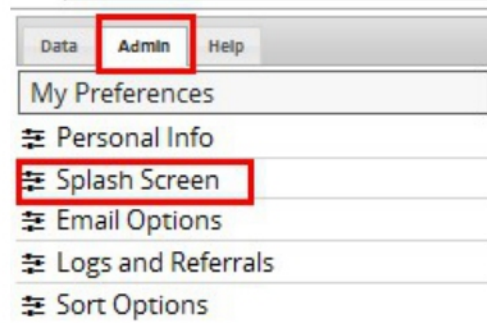
Owner: Advanced Ed

**Save**

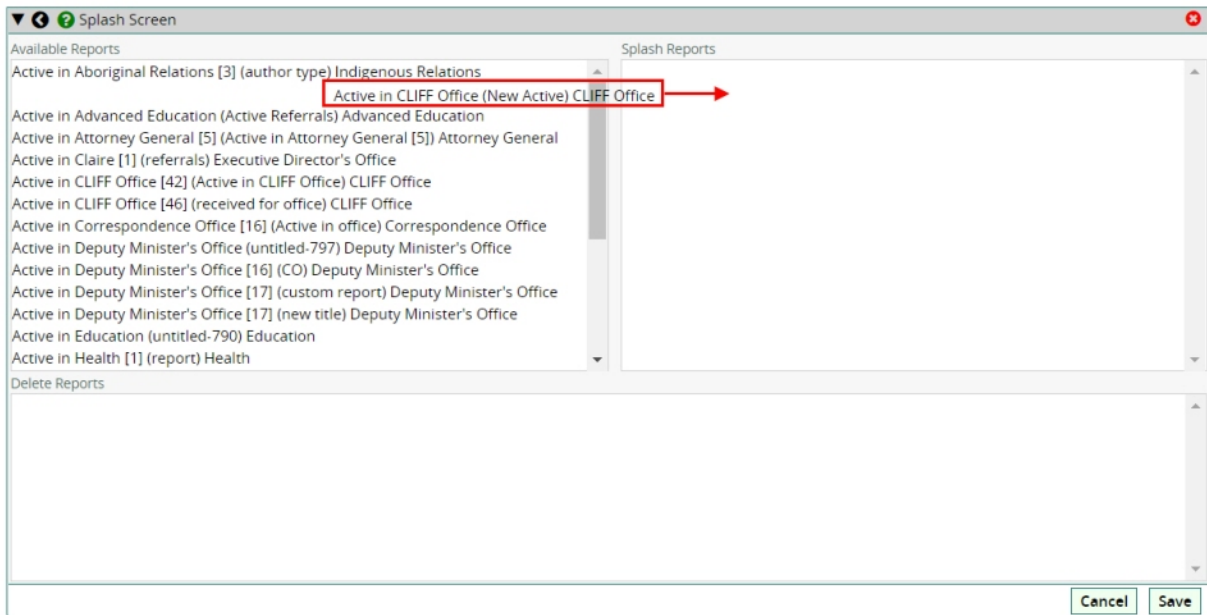
**Options...** **Report**

- Click **Save** to save the report
- Close the report window to return to the main CLIFF screen

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

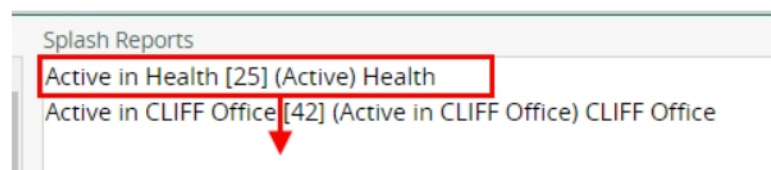


8. To add items to your **Splash Screen**, drag them from the **Available Reports** column to the **Splash Reports** column



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.





- 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	
<input type="checkbox"/> 1313	Crowe, Chelsea	Deputy Minister's Office	test	Letter	Signature		2015/02/13	-39
<input type="checkbox"/> 1366	McCutcheon, Claire	CLIFF Office	Request for funding for new outreach program...	Email	Signature		2015/03/27	-8
<input type="checkbox"/> 1393	Simon, Paul	Correspondence Office	training test https://test.cliff.gov.bc.ca/log/upd...	Letter	Draft	user1	2015/03/26	-9
<input type="checkbox"/> 1394	McCutcheon, Claire	Minister's Office	constit complaint to PO	Letter	Approve		2015/03/31	-6
<input type="checkbox"/> 1398	McCutcheon, Claire	CLIFF Office	testing cliff v6	Letter	Approve		2015/03/27	-8
<input type="checkbox"/> 1399	McCutcheon, Claire	CLIFF Office	DBN re Provincial Decisions Recommendations	Letter	Approve		2015/03/31	-6
<input type="checkbox"/> 1401	Crocker, Betty	Deputy Minister's Office	new example	Letter	Draft		2015/04/08	-2
<input type="checkbox"/> 1419	Cumberbatch II, Benedict	CLIFF Office	training	Letter	Approve		2015/04/09	-1
<input type="checkbox"/> 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	
<input type="checkbox"/> 859	Barry, Devyn	Children and Families	Donec ac sapien. Donec enim orci, ultricies in, ma...	Complement	Rush		2014/04/16	-245
<input type="checkbox"/> 900	Bragg, Keon	Forests	Maecenas vitae ante et lacus aliquam hendrerit. Ma...	Request	Reply		2014/05/01	-236
<input type="checkbox"/> 923	Britton, Caden	Education	Nam uut, massa. Donec at lacus ac mi vehicula bibe...	Phone Call	Advice		2014/04/26	-239
<input type="checkbox"/> 925	Macias, Justine	Forests	Duis ultricies, metus a feugiat porttitor, dolor m...	Media	Advice		2014/04/26	-239
<input type="checkbox"/> 962	Dyer, Giovanni	Children and Families	Praesent malesuada.	Survey	Advice		2014/04/29	-238
<input type="checkbox"/> 963	Murdock, Avery	Energy Mines	Duis ultricies, metus a feugiat porttitor, dolor m...	Media	Meeting		2014/05/06	-233
<input type="checkbox"/> 1022	Crowe, Ellen	Finance	Vivamus sit amet erat nec turpis tempus consequat....	News Release	Reply		2014/05/11	-229
<input type="checkbox"/> 1041	Harvey, Dale	Finance	Nam uut, massa.	Letter	Rush		2014/05/01	-236
<input type="checkbox"/> 1045	Eaton, Marianna	Children and Families	Donec feugiat tempor libero. Donec ac sapien. Viva...	Survey	Rush		2014/05/01	-236
<input type="checkbox"/> 1082	Fisher, Cortez	Aboriginal Relations	Donec vitae dolor. Nullam wisi arcu, suscipit cons...	Fax	Meeting		2014/05/16	-225

## 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.

Email Options

Blind CC

None

☒ Include Log Notes

☒ Include Referrals

☒ Include Attachments

☐ Secure (link to Log)

Number of Days to Allow Access to Link

0

☒ Default to Office Email Address for Sending Emails

Cancel

Save



- **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.

**Log and Referral Options**

☐ Automatically open Authors  
☒ Automatically open Log Notes  
☒ Automatically open Attachments  
☒ Automatically open Referrals  
☒ Automatically open Referral Comments  
☐ Automatically show Information Tag  
☐ Show default Information Tag  
☐ Automatically display new Log  
☐ Automatically display new Batch Member  
☒ Default to Last Log Type

New Referral Action: Reply Direct

☒ Confirm Deletions  
☐ Disable Duplicate Search  
☐ Re-use display on Quick Search  
☐ When keyword searching, search external attachments as well

Active Period: 365 days

Records Per Page: 15

Log Template: No Template

Cancel Save

- **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:

▼ MLA-Opposition: Carole JAMES, Victoria-Beacon Hill


Salutation	Ms.	First Name	Carole	Type	MLA-Opposition
Last Name	JAMES	Address 1084 Fort Street			
Title	MLA				
Division		City	Victoria	Province	BC
Company	Victoria-Beacon Hill	Country		Postal	V8V 3K4
Email		Phone		Cell	


▶ Private Citizen: Melinda James (secondary)

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

▶ MLA-Opposition: Carole JAMES, Victoria-Beacon Hill

▶ Private Citizen: Melinda James (secondary)

- **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.

Issue: Dental Care  Approved: [ ] Sign By: [ ]

X-Ref: [ ] Signed: [ ] Resp Type: [ ]

Drafter: [ ] Closed: [ ] File No.: [ ]

☐ Special Author

Subject: [ ]

Log Note

Date: 2016/11/21 Time: 16:12:34 Office: CLIFF Office


[ ]


Referral

To Office: CLIFF Office ☐ Note: [ ]

Action: Draft Assign To: [ ] ☐

Dental Care issues must be directed to the review panel before responding. Ensure that client number is recorded in the Subject line of the CLIFF log.

- **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.

X-Ref	Q	<input type="text"/>		Signed	<input type="text"/>	Resp Type	Q	<input type="text"/>
Drafter	Q	<input type="text"/>		Closed	<input type="text"/>	File No.	Q	<input type="text"/>
						<input type="checkbox"/> Special Author		
Subject	<div><div></div></div>							
Log Note								
Date	<input type="text" value="2016/11/21"/>	Time	<input type="text" value="16:24:42"/>	Office	Q	<input type="text" value="CLIFF Office"/>		
<div><div></div></div>								
Referral								
To Office	Q	<input type="text" value="CLIFF Office"/>	<input type="checkbox"/>	Note	<input type="text"/>			
Action	Q	<input type="text" value="Draft"/>	Assign To	Q	<input type="text"/>	<input type="checkbox"/>		
If there is a previous CLIFF log that relates to this assignment, enter the CLIFF log ID in this field.								

- **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.

Referral			
To Office	Q	CLIFF Office	<input type="checkbox"/> Note
Action	Q	Draft	Assign To Q <input type="checkbox"/>

- **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.

▼
↶
?

Other Options

☒ View Supplemental Help  
☐ Show shared reports from other Offices

Cancel
Save

- **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



**New Template**

Template Access  
 Label  ☐ Shared ☒ Office Use Only By

Log Type  ☐ Confidential ☐ Priority

Status  Batch

Address To  Written  Action

Copy To  Received  Sig Level

Rsp office  Approved  Approved By

Issue  Signed  Sign By

X-Ref  Closed  Resp Type

Drafter  Meeting Date  File No.

Location  Time  ☐ Special Author

Attendees  Fee Estimate Due

FOI #  Records Due

Subject

Responsive Records

Referral  
 To Office  Referral Action

- **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

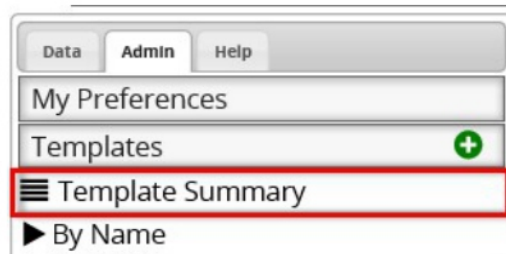
5. Click **Save**

### 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**

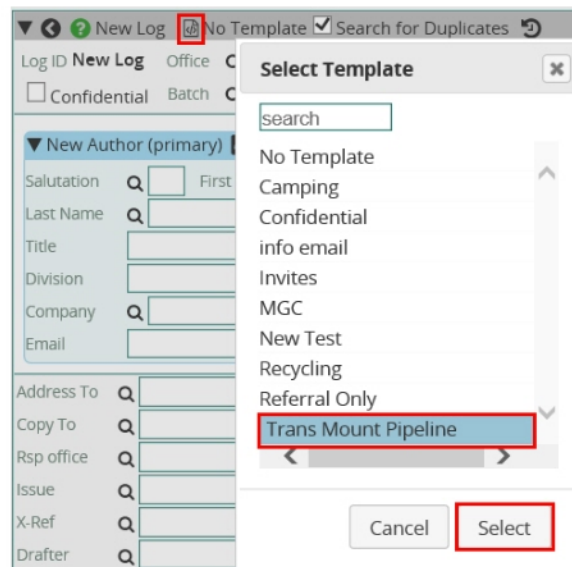
Note that the **Template Summary** will display a summary of the templates for your office:





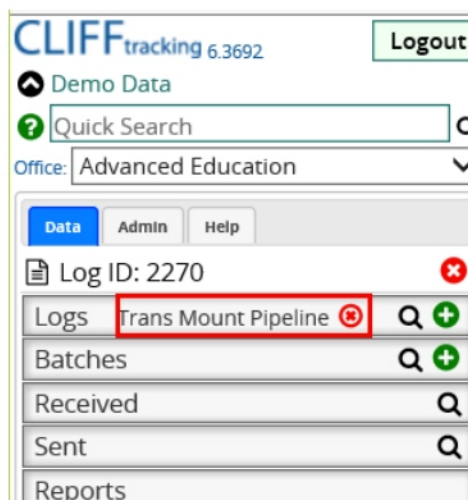
## Using a Template


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.