ACTIVITY NOTE BEHAVIOR (EDITING AN EXISTING NOTE)

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DEFINITIONS

Compact [list, detail, queue] view

- View as presented in the left-hand drawer.

Pop-out [list, detail, queue] view

- View as presented in a full screen pop-out.

NEW ICONS & THEIR MEANING

Pop-out		**Clicking this icon pops out the entire workflow stack starting with anything after the Tract-feature summary. Once this workflow is popped out into its own view, it is removed from the original screen and the left drawer is returned to the Tract-feature summary, if available.**
Pop-in		(out of scope) Clicking this icon closes the child view and places the previously popped out view back into the left drawer of the parent window. This replacement includes the workflow steps up to the point of closure/pop-in so users can still navigate back through what they were working on.

Show comments		**Clicking this icon slides the comments panel open when user is viewing notes in compact view.**
Hide comments		**Clicking this icon slides the comments panel closed when user is viewing notes in compact view.**

EDITING AN EXISTING ACTIVITY NOTE

COMPACT VIEW

Workflow 1 – Compact view from the activity notes list

- Pre-req: User has navigated to the activity note list and selected a single note via the selection avatar.
- Alternate Pre-req: User has opened a detail view of an activity note.
- User clicks the edit icon in the top tool bar.
- The activity note edit view slides out from left over the top of the activity note list.
- Actions available to the user when in the activity note edit compact view are:
    - Close
        - User is able to close the activity note entry
            1. Clicking close prompts the user to save or discard changes if changes have been made.
    - Pop-out

        - User is able to detach the entry view from the map and open it in a pop-out view (described below).
    - Copy
        - Clicking this icon opens the copy note dialog/workflow as it is today (no change)
    - Show/hide comments
        - User is able to click the show/hide comments icon.
            1. This slides the comment panel in and out from behind the left drawer
            2. The comments panel is open by default if both of the following conditions are true:
                - Note is in the review process
                - 1 or more comments exist
            3. The comments panel is closed by default if any of the following conditions are true:
                - Note has been approved
                - No comments exist
        - User is able to follow the comments workflow, as described in the comments workflow document.
    - Submit
        - Available to agents only.
    - Add/edit related items
        - User is able to add related documents and their details by clicking the plus icon in the related items section.
            1. This will open the common list dialog with the options to add a document, status or provision. (as currently implemented)
            2. User selects a type of item to add
            3. Once user completes the add/edit workflow for the type selected, they are returned to the activity note entry screen with that types tab active/visible.
    - Delete related items
        - Related items each have a context menu with the option to “remove” the item.
    - Approve/Reject
        - Available to reviewers only.

POP-OUT VIEW

Workflow 2 – Pop-out view

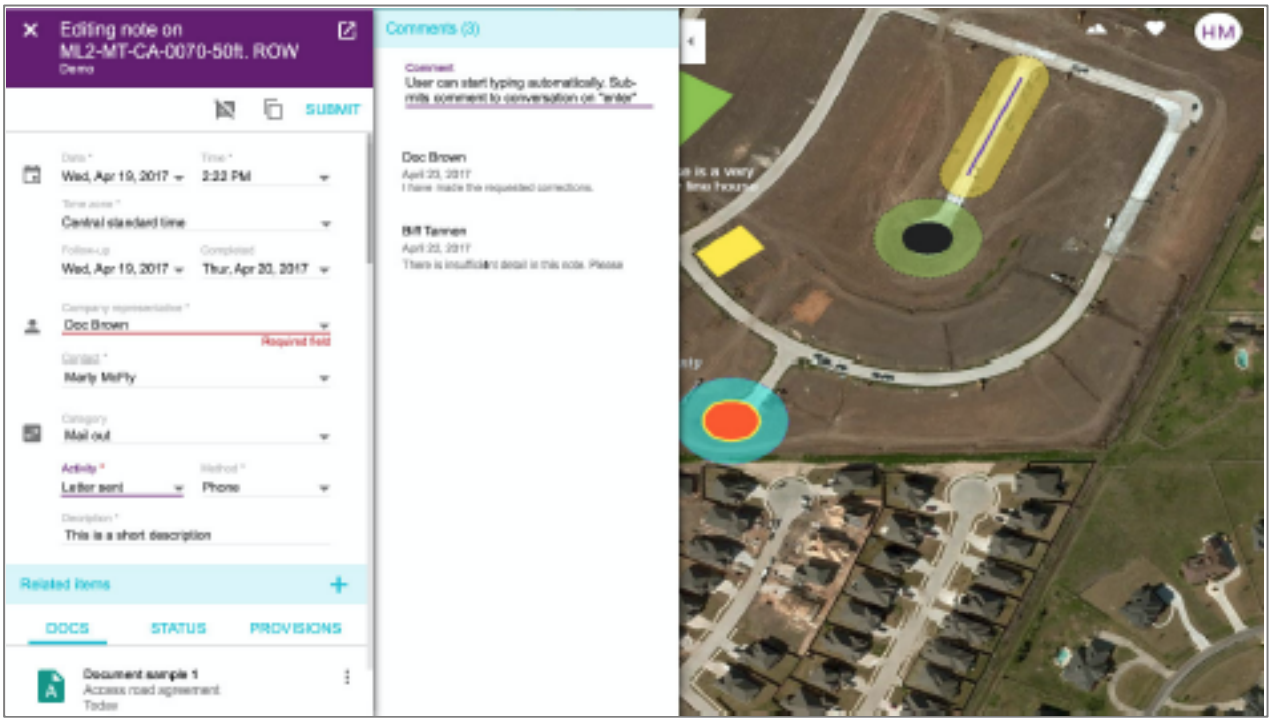
- Pre-req: User has navigated to the activity note list and selected a single note via the selection avatar.
- Alternate Pre-req: User has opened a detail view of an activity note.
- User clicks the edit icon in the top tool bar.
- The activity note edit view slides out from left over the top of the activity note list.
- User clicks the “pop-out” icon in the top right of the activity notes entry title bar.
    - The activity note entry is removed from the parent map view and opens in its own window/tab.

    - If user came from the list view, the list view and/or the detail view is brought out into the child window as well, so users can navigate back through without needing to return to the parent and execute another search.
    - If user came from the TFS into a detail view, the detail view is brought out into the child window as well, so users can navigate back to it without needing to return and execute another search.
- Actions available to the user when in the activity note detail pop-out view are:
    - Pop-in (out of scope, more design needed)
        - User is able to reattach the list view to the map in the left drawer.
        - This action closes the child pop-out and places the list view back into the left drawer of the parent map.
    - Close
        - User is able to close the activity note entry
            1. Clicking close prompts the user to save or discard changes if changes have been made.
    - Copy
        - Clicking this icon opens the copy note dialog/workflow as it is today (no change)
    - Submit
        - Available action for agents only
    - Add/edit related items
        - User is able to add related documents and their details by clicking the plus icon in the related items section.
            1. This will open the common list dialog with the options to add a document, status or provision. (as currently implemented)
            2. User selects a type of item to add
            3. Once user completes the add/edit workflow for the type selected, they are returned to the activity note entry screen with that types tab active/visible.
    - Delete related items
        - Related items each have a context menu with the option to “remove” the item.
    - Comments
        - Always visibile in pop-out view
        - User is able to follow the comments workflow, as described in the comments workflow document.
    - Approve/Reject
        - Available for reviewer only.

ACTIVITY NOTE EDIT NOTE COMPACT VIEW WIREFRAME

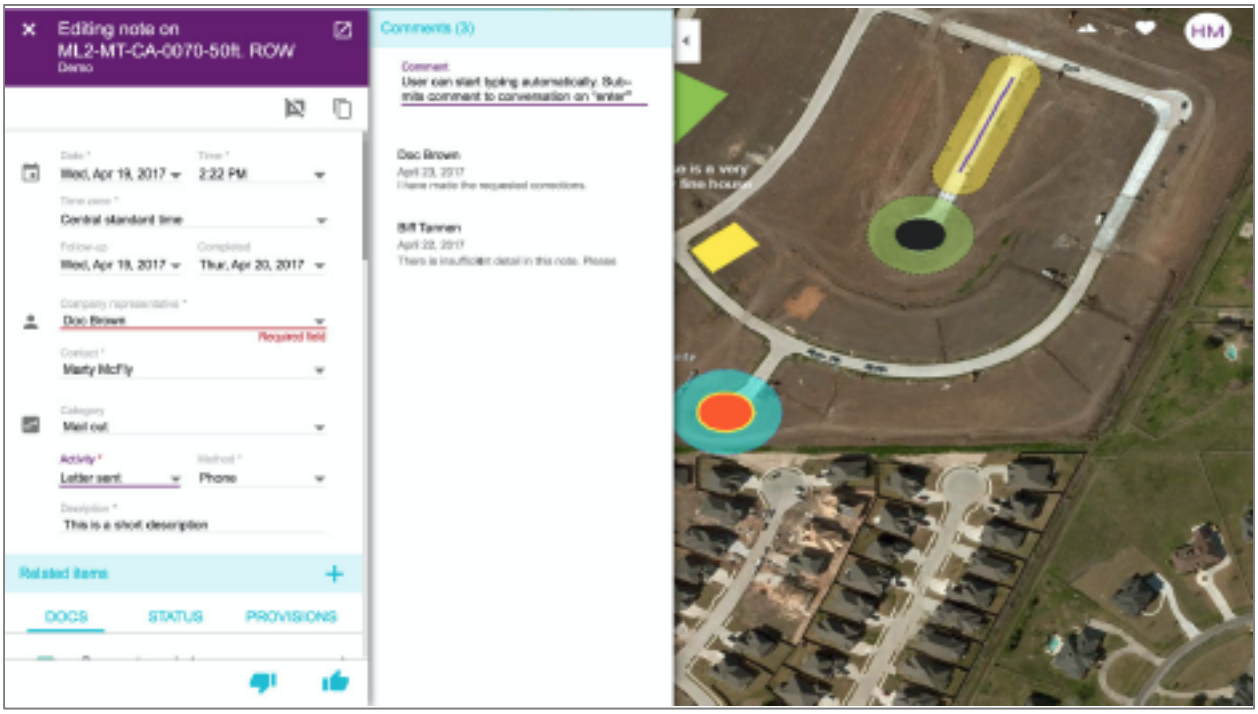
AGENT

Desktop: Shown as map view



REVIEWER

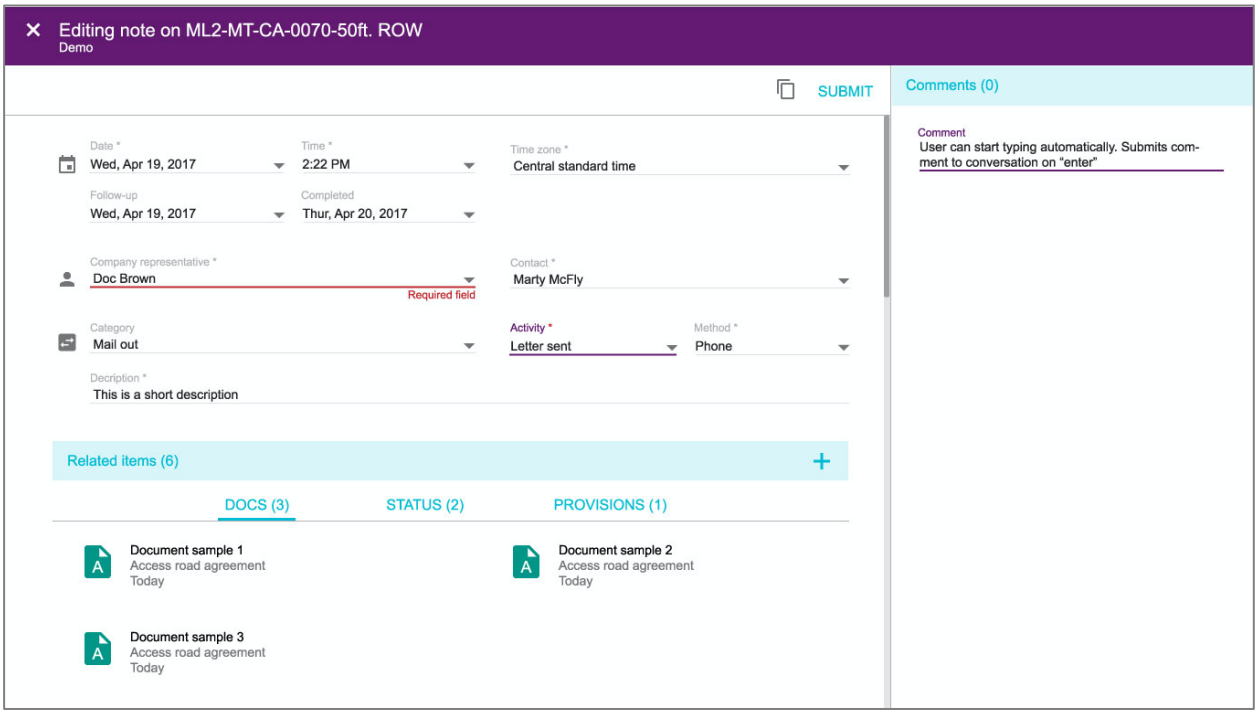
Desktop: Shown as map view

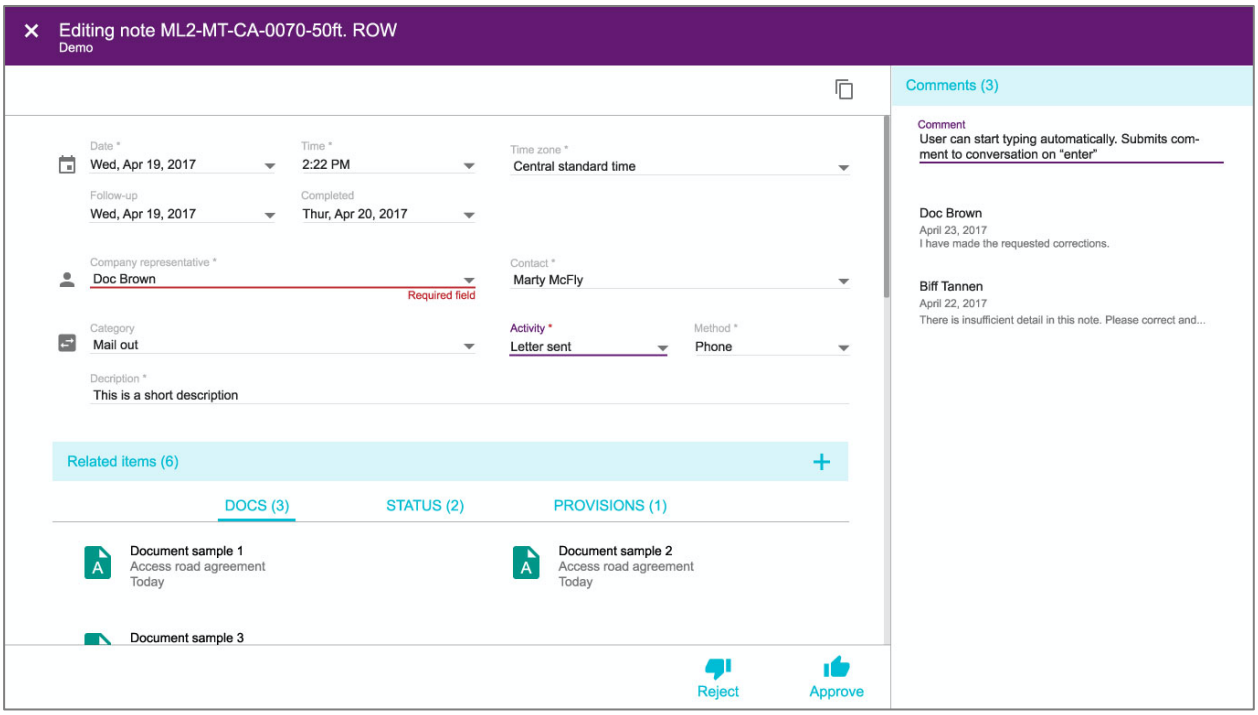


ACTIVITY NOTE EDIT NOTE POP-OUT VIEW WIREFRAME

AGENT

Desktop: Shown as map view



REVIEWER

Desktop: Shown as map view