Woodland Trust Engagement Portal – Guidance Document

This story was made with Esri's Story Map Journal.
Read the interactive version on the web at https://arcg.is/1OD5OS.

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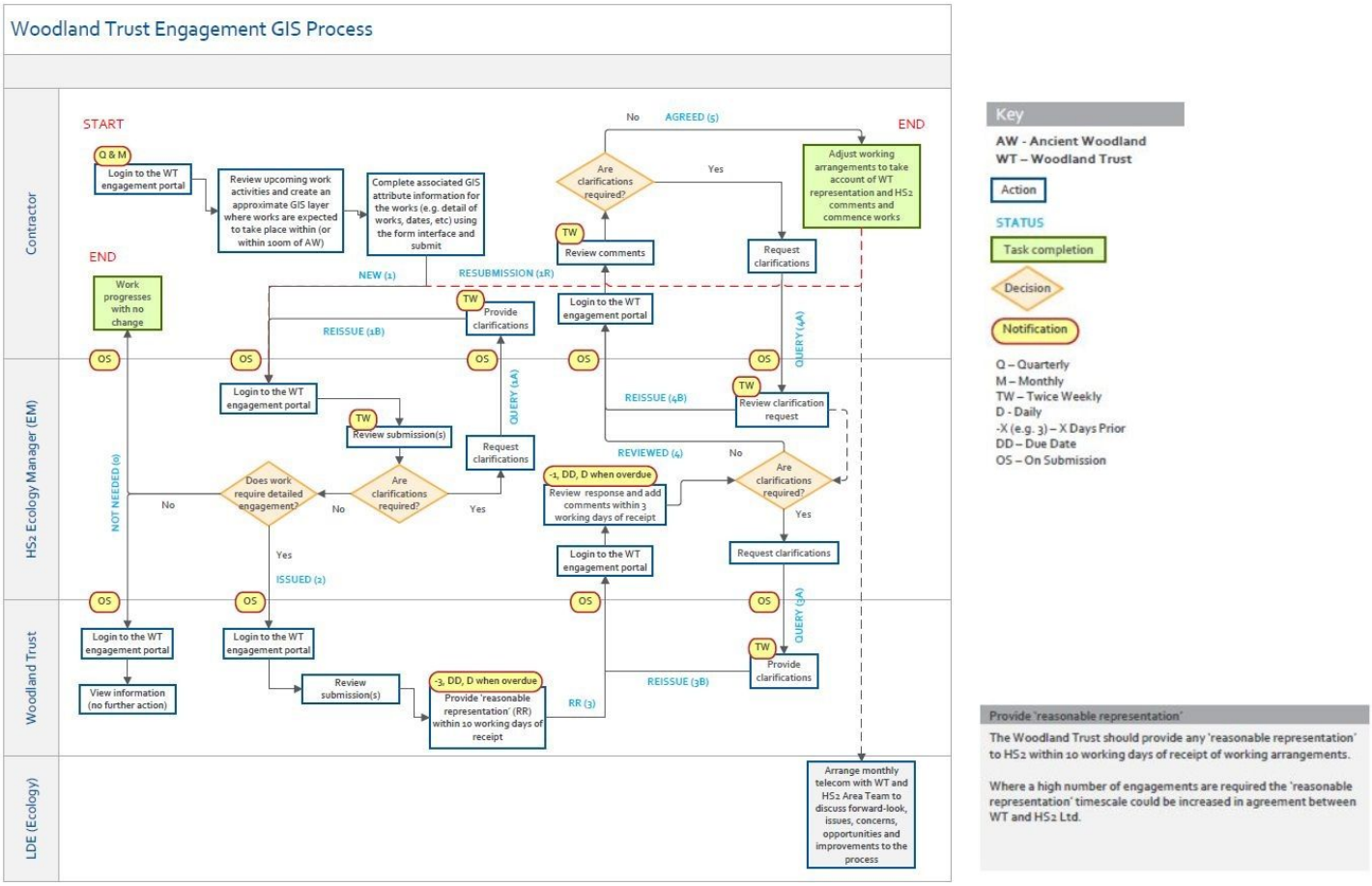
1. Introduction

This portal has been created to enable all parties involved in the Woodland Trust engagement process to have access to a shared GIS environment with a common and consistent interface.

The user guide covers all the elements of the Collaborative Engagement maps from the general interface through to the detail of each widget. If you have any further questions after browsing this guide, please contact the **HS2 EDP Team** (link: mailto:russell.jordan@jacobs.com) .

We recommend that you use Google Chrome to access this web map for optimal performance.

2. Portal Design



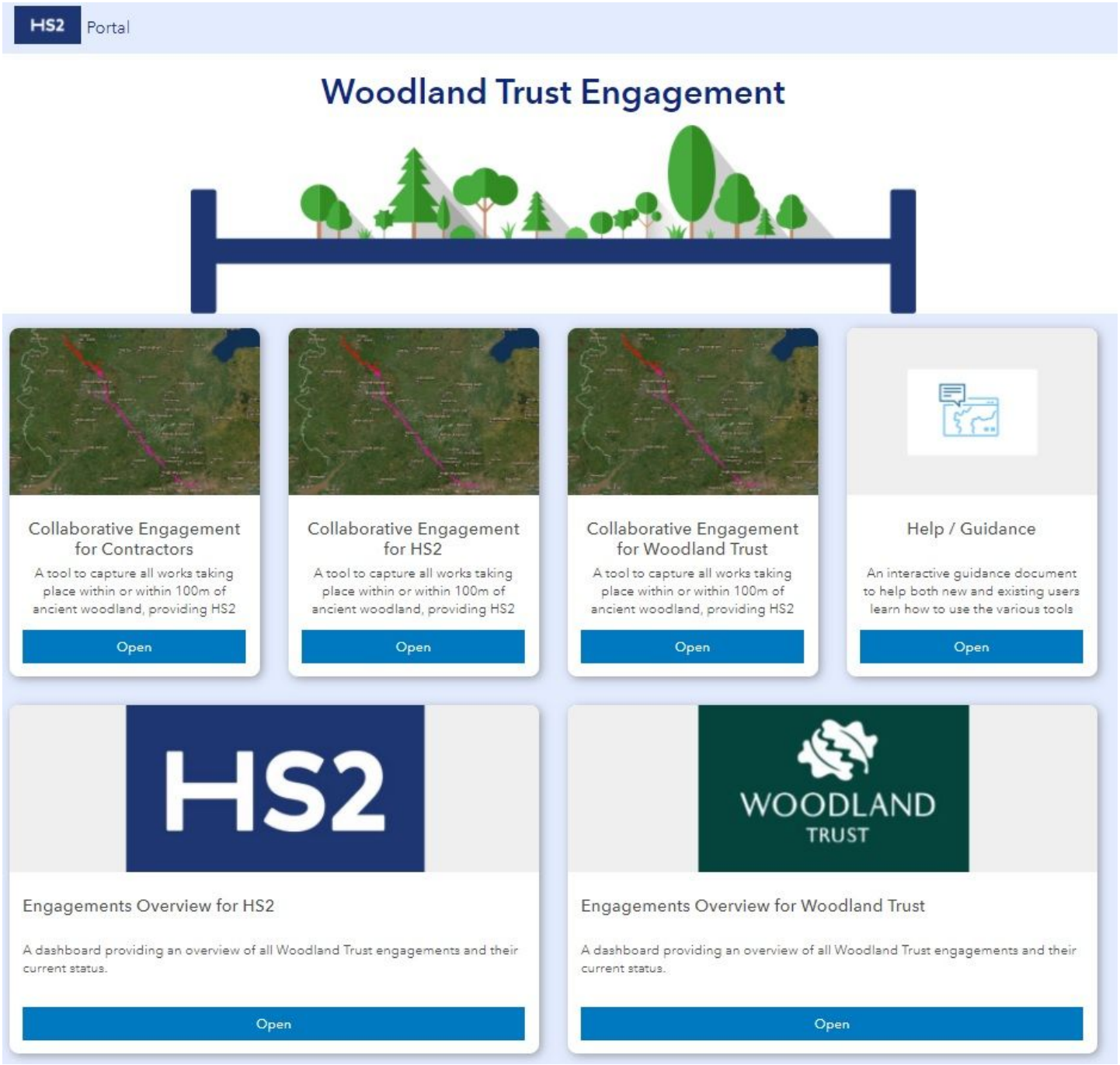
The diagram to the right provides a high-level overview of the new workflow that underpins the new portal. In simple stages this is:

1) The contractor creates a new record and submits this to HS2
2) HS2 review and issue this to the Woodland Trust
3) The Woodland Trust provide a Reasonable Representation
4) HS2 and the Contractors review the response and take any necessary steps
5) Engagement is complete

Note that there is also another status (0) where HS2 (or the Contractor in agreement with HS2) determine that no engagement is required and a 'for information' notification is issued to all parties.

When a user logs into the portal and changes the status of a record (perhaps along with other changes), automated emails are sent to the users to inform them of what has been changed and any actions required.

3. Accessing the Portal

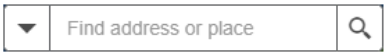


When you first access the portal you will be greeted by the screen to the right.
The options here are:
1) The Collaborative Engagement Map for creating new records, responding to engagements as required, and accessing data from historic engagements;
2) Load this help/guidance document; or
3) View dashboards providing an overview tailored to your role on this project (not applicable to contractors)

You can also contact the creators of this portal by clicking **Provide Feedback** at the bottom of the page.

Upon entering the web map, you have another opportunity to access this help/guidance document via the splash screen (link available only in online story).

4. Widgets

Widget	Symbol	Widget	Symbol
Zoom In/Out		Help	
Home		Sidebar Control Arrow	
Current Location		Legend	
Coordinate Picker		Layer List	
Basemap Gallery		Bookmarks	
Measurement		Add Data	
Attribute Table		Smart Editor	
Search			

The web map includes a number of tools for the user to control and interrogate their data. Here is an overview of all of them:

4.1 General Tools

4.1.1 Zoom In/Out

The Zoom Control widget provides interactive zoom controls in the map display. This tool allows the user to focus in on a particular feature or zoom out to a wider area.

This function can be replicated using the scroll wheel on a mouse.

4.1.2 Home

The Home widget enables you to return to the original extent of the map which is presented to you when you first open the webmap. This is a useful tool if you become disoriented or wish to 'start again'.

4.1.3 Current Location

The Location widget enables you to zoom to your current location in the map (assuming you have Location Services enabled on your device).

4.1.4 Coordinate Picker

The Coordinate Picker widget displays the coordinate values of a specified point on the map. Simply click on the widget and then on your map to display X and Y coordinates in OSGB British National Grid six-figure format.

4.1.5 Basemap Gallery

The Basemap Gallery widget **presents a gallery of basemaps (link available only in online story)** and allows you to select one from the gallery as the basemap for your map. Basemaps are the background upon which your layers draw and can include topographic maps, street maps and aerial imagery.

Please note that the changes to the background basemap are not permanent, and when you log back into the map it will default to the aerial imagery with location labels.

4.1.6 Help

The Help link directs you back to this document.

4.1.7 Sidebar Control Arrow

This opens and closes the sidebar, allowing the user access to the tools featured on the sidebar itself. Clicking directly on the widget symbol within the sidebar will also expand the sidebar.

4.2 Accessing Data (link available only in online story)

4.2.1 Search

The Search widget enables you to find locations or search for features within the map. Here you can search for:

- Place name, address or postcode (as you would with other map-based websites);
- A specific Ancient Woodland using its name or;
- An existing Woodland Trust engagement using it's numeric ID.

To search within a specified layer click the dropdown arrow on the left-hand side and choose appropriately. Alternatively, start typing in the search bar and options will appear as you type.

4.2.2 Attribute Table

The **Attribute Table (link available only in online story)** widget displays a tabular view of the Woodland Trust engagement layers' attributes. It displays at the bottom of your web map and can be opened, resized, or closed.

To filter the attribute table users can select a field and criteria to filter by, which will change depending on whether the values in a field are numeric, dates or text. The cog on the right-hand side of the expression box gives users three options Value, Field, and Unique. Value requires users to type the Value that they wish to filter by. Unique will let users select from a list of the column’s values (may not be available if too many values). Field will filter based on comparing the value in one field to the value in another field.

By clicking filter by map extent in the attribute table users will filter returned records to only those shown in the current screen extent.

The user can also filter by expression. This enables the filtering to be based on values in multiple fields, for example a work start date and a value in the description of works field.

The show/hide columns option lets the user hide any columns they may not need to view, which can help when comparing values. Another function that helps users when comparing columns is being able to re-arrange the columns by clicking, holding and dragging their heading to reposition them in relation to other column headings.

The user can sort by Ascending or Descending values by clicking on the column heading at the top.

There is also the option to export the contents of the attribute table to a CSV (which can be opened using Microsoft Excel).

Please note that the results of filtering within the attribute table are not a permanent modification to the map, so when you exit the web map and return another time you will need to re-filter the data.

4.2.3 Legend

The **Legend (link available only in online story)** widget displays the active layers within the map extent, alongside their symbology. When on the Home screen the user will only see those layers visible at the full extent. As the user zooms in additional layers will become visible in the legend.

4.2.4 Layer List

The **Layer List (link available only in online story)** widget provides a full list of accessible layers and allows you to turn individual layers on and off. Each layer in the list has a check box that allows you to control its visibility. When the Layer List is open users will see three horizontal dots to the right of a layer's name where they can click on this to view the layers attribute table or show any metadata that has been uploaded.

Within the layer list you can also carry out a keyword search which will filter the layer list to all layers with the keyword within their name.

Please note that any changes to the visibility of a particular layer will only be visible in the current viewing session; they are not a permanent change and will need to be re-applied on your next login.

4.2.5 Bookmarks

The **Bookmark (link available only in online story)** widget enables you to bookmark specific map extents. For example, if there is an area that you wish to come back to and find then this widget allows you to save that and return to it another time. These are user-specific and not shared with other users that have access to the same map.

4.2.6 Add Data

The **Add Data (link available only in online story)** widget enables you to add spatial data to your map view. There are three options as to where data can be added from. The first is from ArcGIS Online for example, using the search function within the Add Data tool. From ArcGIS Online you can add data such as a terrain model or any other datasets that have been made publicly available via this repository. The URL tab allows you to add data from a web address, and data types which can be added from this area include:

- An ArcGIS Server Web Service
- A OGC WMS Web Service
- A KML File
- A GeoRSS file
- A CSV File

The file tab allows you to add GIS shape files (which must combined into a single zip file), CSV and KML (Google Earth).

Please note that the data added to the web map with this widget is not permanently added to the web map and it will have to be reloaded next time you login.

4.2.7 Measurement

The Measurement widget allows the user to measure the area of a polygon, the length of a line or the distance from one feature to another.

The default units are set to metres squared for area and metres for length.

4.3 Smart Editor

The **Smart Editor (link available only in online story)** widget enables you to edit the Woodland Trust Engagement Works layer, whether that be filling in the attributes or the initial creation of a polygon for the area of interest.

Within the widget you are provided with drawing options to help you create the feature. These drawing tools include but are not limited to polygon, freehand, rectangle and circle. Once the feature has been drawn data can then be input into the feature's attribute table.

Where multiple features overlap it may be necessary to use the **arrows (link available only in online story)** at the top of the window to select the feature to be edited.

Please ensure that you click the 'Save' button to save your changes or the 'Clear' button to discard them otherwise your updates may be lost.

5. Worked Example and Video Guide

The following documents can be downloaded to help you gain an understanding of how to use this portal.

- A 12-minute video guide of how to access and use the portal can be downloaded by clicking **here**
- A 'worked example' document to help you understand the process and logic behind this portal (and what you need to do) can be downloaded **here**

6. Test Area

Please use the Test Environment to the right *(link only available online)* to try the widgets for yourself before creating or updating any live data in the portal.

Please note that widget availability and/or functionality will vary depending on the organisation and/or role of the user. However, in this Test Environment all functionality and widgets are available.