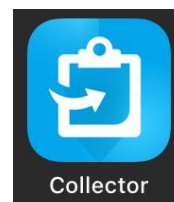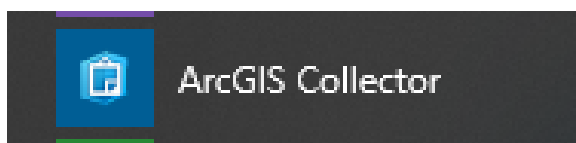# How to Edit, Archive, and Delete Records using Collector
Loading Collector

1. Open the Collector application on a desktop or mobile device.
   a. This may be referred to as "ArcGIS Collector" or "Collector", depending on the device. If multiple versions are installed, use the "Collector" versions and not the "Classic" versions.


2. Open the applicable map relevant to the types of records being edited. The maps available in the Collector app will be based on which eMaintenance editing group that the user belongs to. If a particular map is not displayed, check with the District Champion that the user is a part of that group.
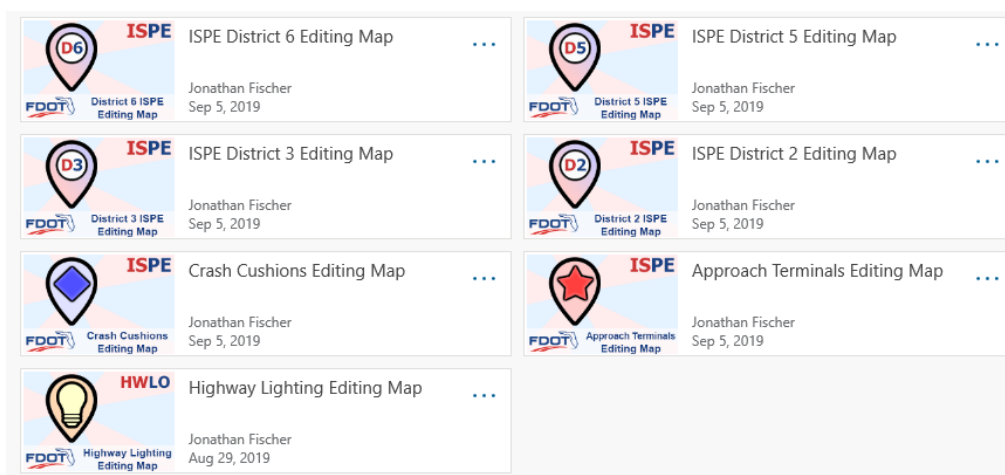
Editing Records

1. Locate the area with the record(s) to be edited by moving the map and zooming in.
   a. If the edits involve moving a point or modifying the shape of the line/polygon based on a satellite imagery as a reference, the user must first change the basemap to the satellite imagery before entering editing mode.

   To change the basemap, click on the menu button on the header bar and click on the basemaps option or click directly on the basemaps icon, which may vary between different devices.
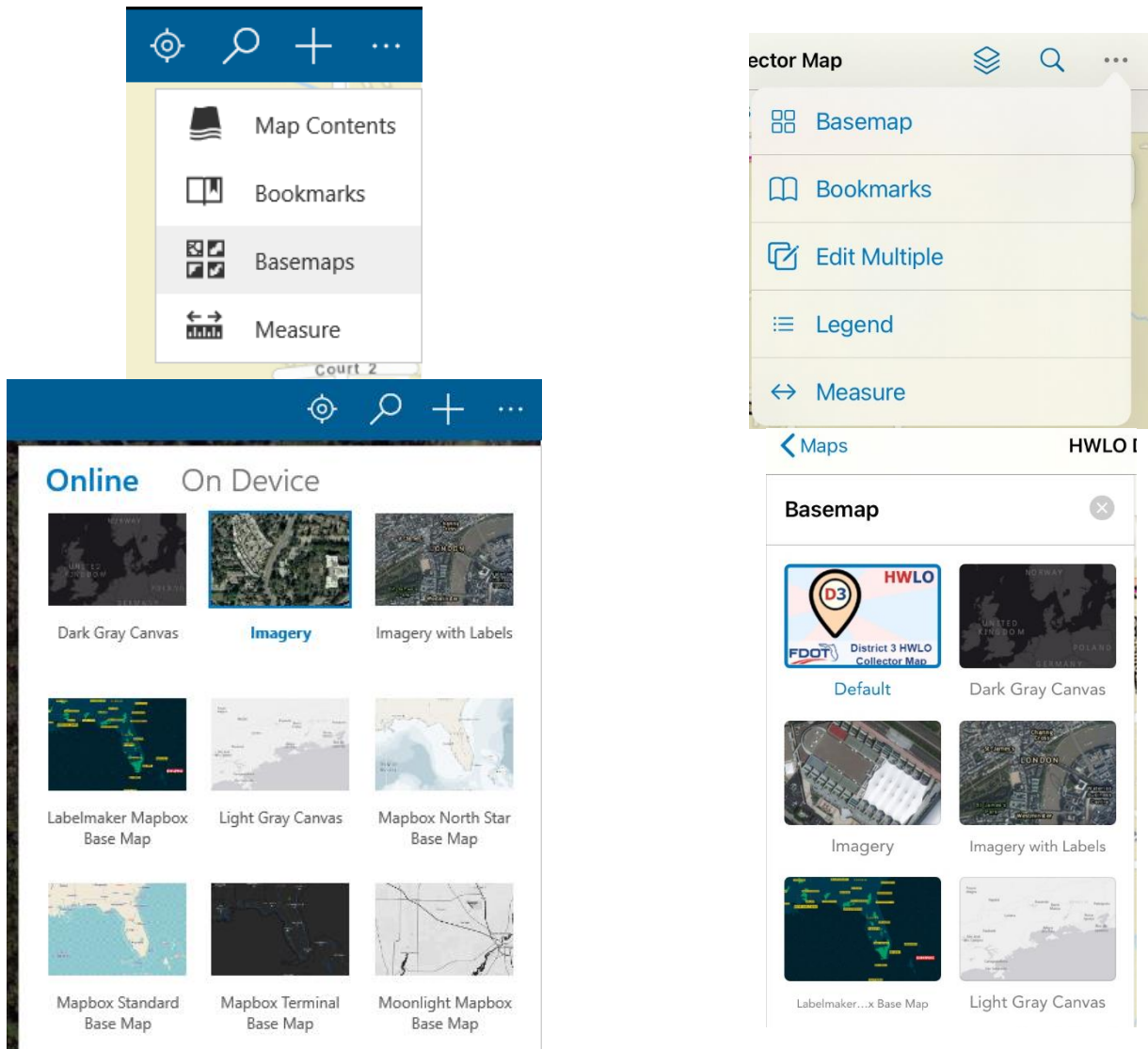
   The user may need to scroll through the list to see additional types of basemaps not initially displayed on the list. This menu will close once a new basemap is selected.

2. Once the point to be edited has been identified:
   a. If the record to be edited is a point/line/polygon with a symbol/shape that draws on the map, click on the point.
   b. If the record to be edited is a related record of a point/line/polygon, such that the record does not have its own symbol/shape, find the parent symbol/shape of the record to be edited and click on that point.
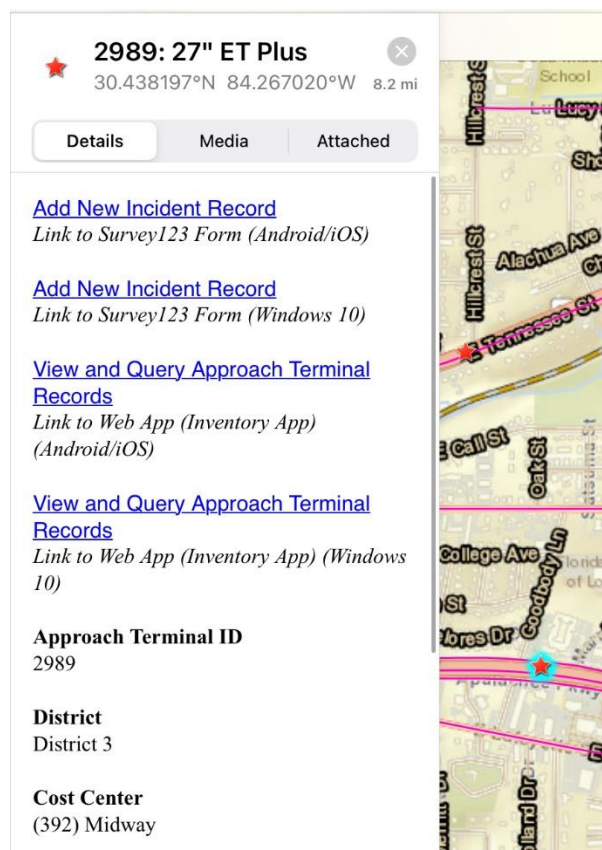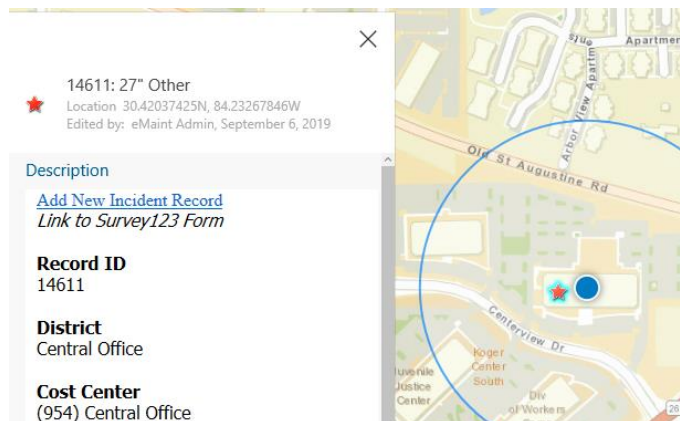
Scroll down in the pop-up of the point to find the section for related data (incidents, outages, inspections, etc.), then click on the view button.
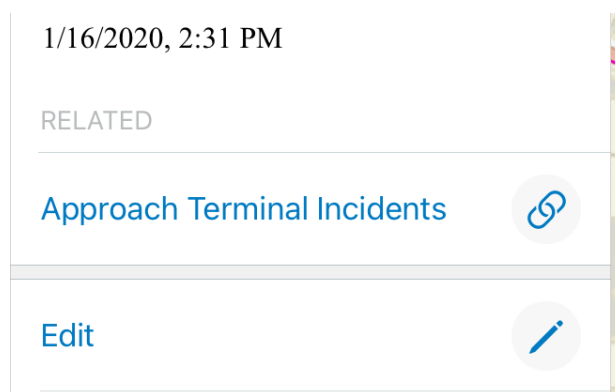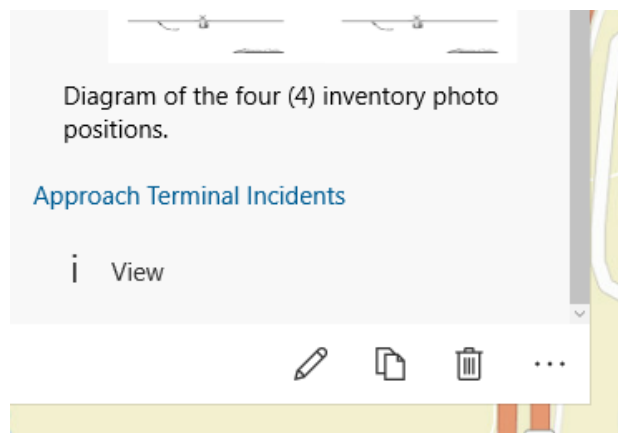
If there are multiple records displayed on this screen, click on the applicable record.

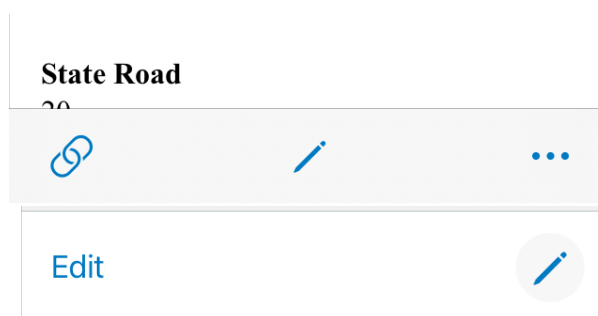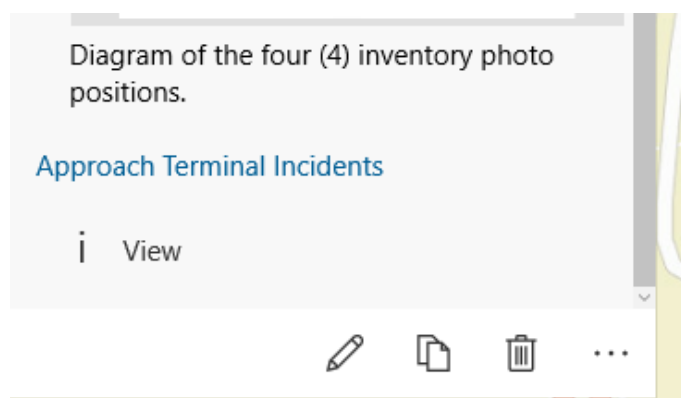| 3 features	✕
444: 9/4/2019	...
445: 9/6/2019	...
446: 9/5/2019	...

Approach Terminal I... ✕
Related to 5385: 27" ET Plus

327: 6/3/2019

326: 4/17/2019

261: 2/19/2019

211: 11/6/2018
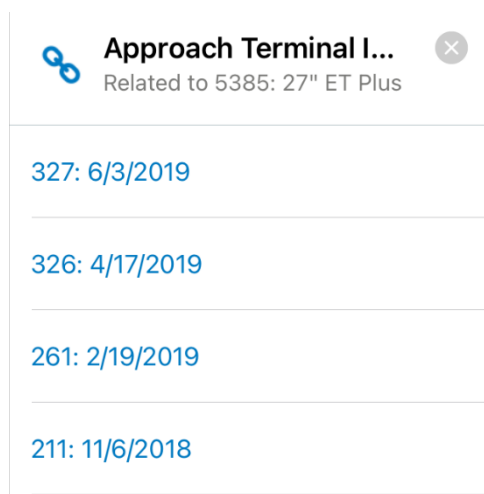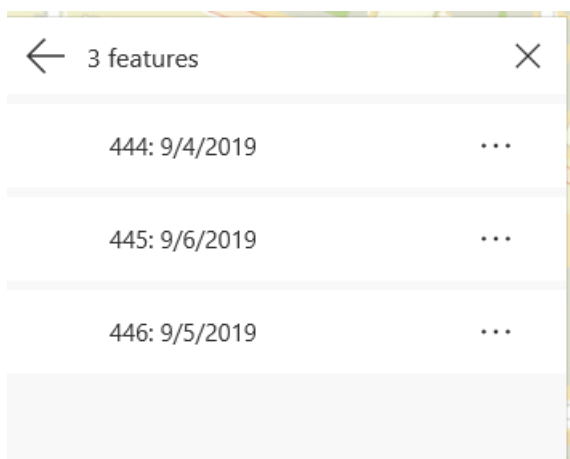
3. To edit the record, enter editing mode on the version of Collector in use.
    a. If there is an editing icon (such as a pencil), click on it to enter editing mode.
    b. If there is not an editing icon but there is a menu icon (such as a box with an upward arrow), click on the menu button, then follow the menu to find "Edit", and click it to enter editing mode. The options in this list may vary depending on the type of record being edited.

Diagram of the four (4) inventory photo positions.

Approach Terminal Incidents

i   View

State Road

🔗   ✏   ...

Edit   ✏

4. Make any edits to the record as necessary. This may include moving the point, editing the data, or attaching/removing images and file attachments.
    a. Certain fields may have restrictions on what values may be entered. The submit button will not allow the user to save the changes unless those fields receive valid data.

Mile Post
Enter a number between 0.000000 and 100.000000.

103

Number is outside the acceptable range.

b. For combinations of fields where changing the value in one field alters the list of options in another field, such as ISPE Approach Terminals where changing the <u>Guardrail Height</u> will change the list of options in the <u>Guardrail Type</u>, be sure to update all fields as necessary and applicable. In this case, a 27" height should not be matched with a 31" type, and the combinations of both fields must match.

For these types of fields, Collector may prompt the user with a warning about "Changing Feature Type". In this case, the user must select "Keep Current Values" from the list of options in order to change the type. Do **not** select "Reset to Default Values" from the list of options.

c.   For records with points displayed by a symbol on the map, the user may adjust the location of the point to move it closer on top of the asset. The user should follow the steps in #3a above to have the most accurate reference image of where to move the point.

In order to move the point, the user may simply tap on a new location on the map in order to move it. The user should zoom in as close as possible to see any additional details from the basemap imagery.
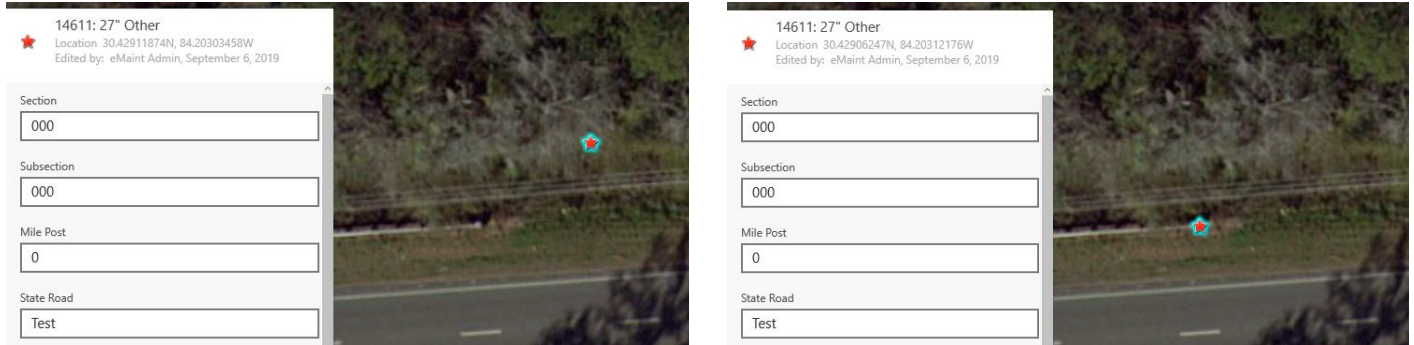

At this time, there are not any eMaintenance features or supplemental layers to edit using lines or polygons. This documentation will be updated as these different types of shapes are utilized.

d.   If the user needs to modify the attachments, scroll through the pop-up to the "Attachment" section.
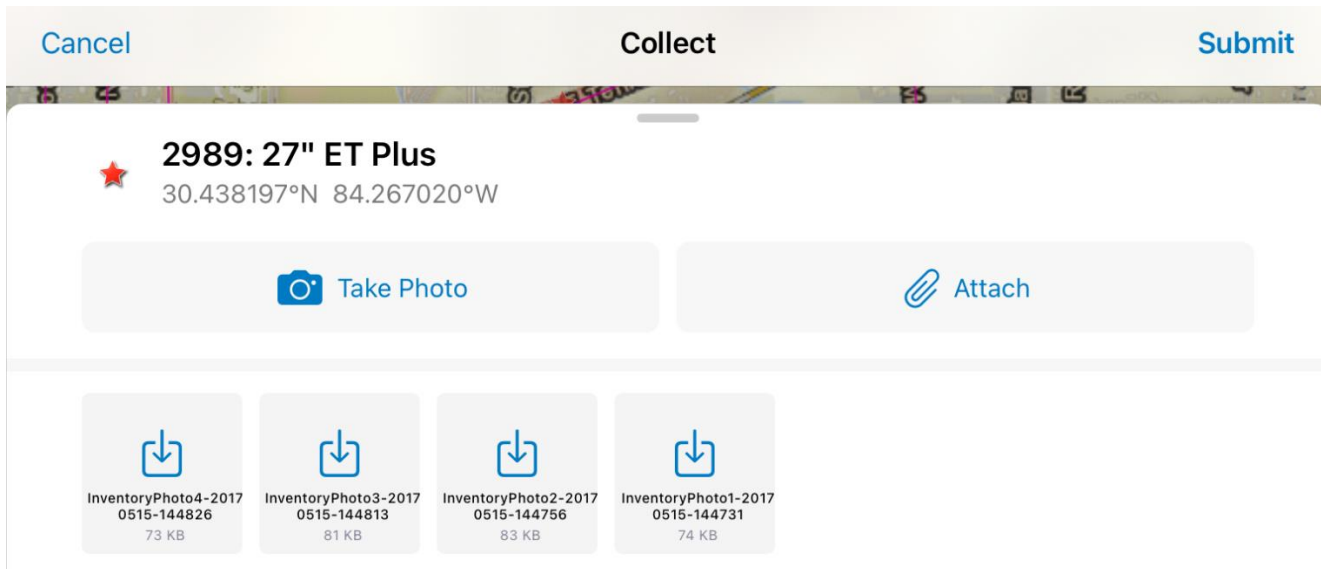
i. To attach a new photo saved on the device in use, select the icon of a folder with an arrow. This will bring up a dialog box where the user may navigate to and open the folder containing the photos, and select the photo to attach. Click "Open" to add it to the record.
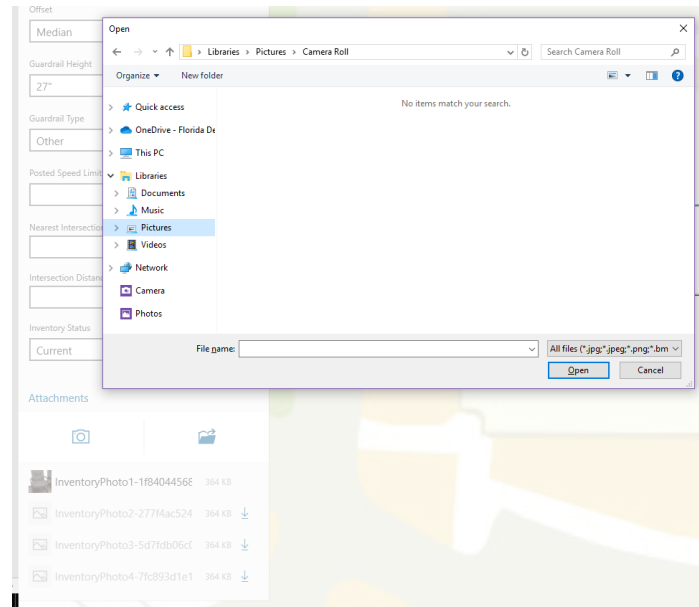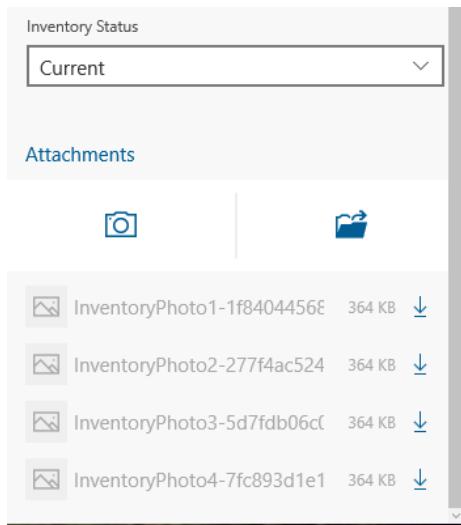

To rename or delete an existing photo attached to the record, right click on it. Select the applicable option and follow the steps to complete the action.
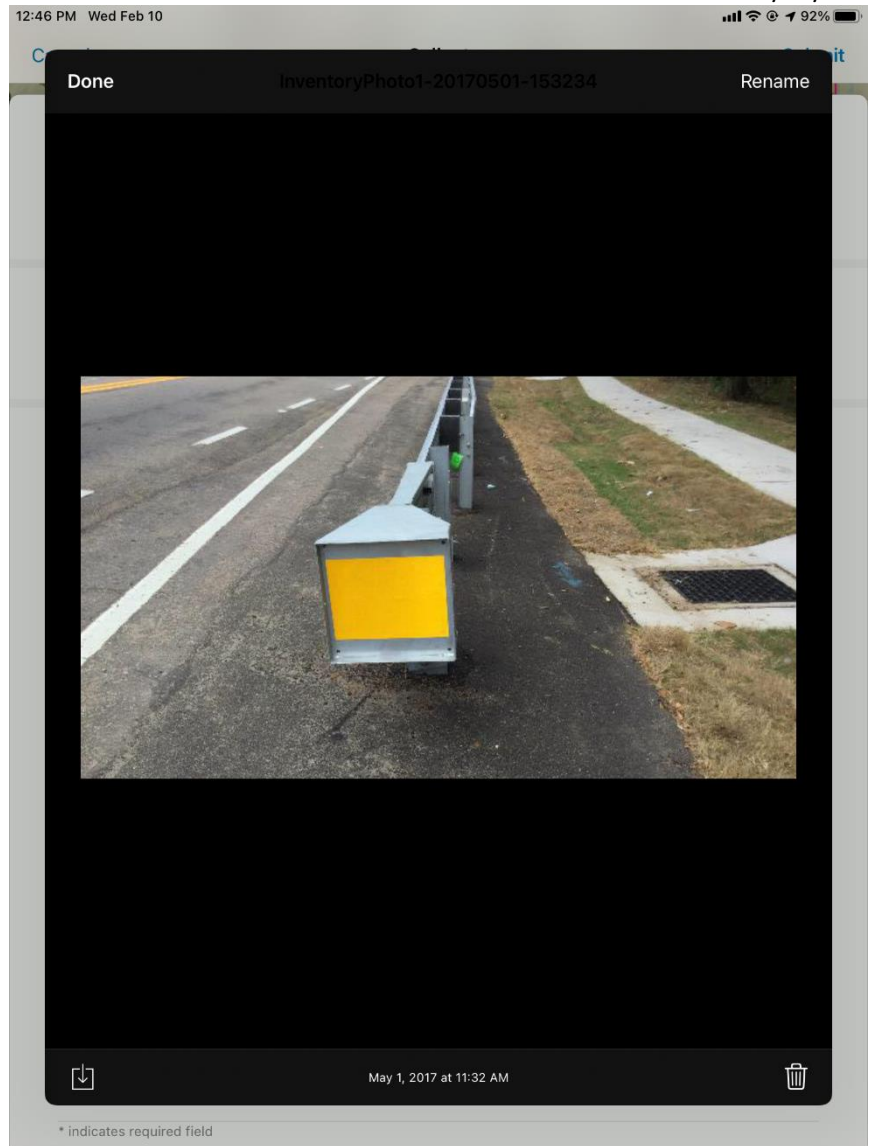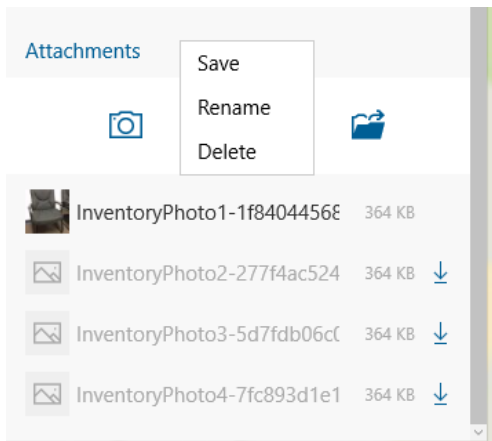
Tap the "Done" button in the upper left corner of the window to close it.

    e.   Certain fields may not be edited using Collector. For example, the District, Cost Center, and County values may not be changed on an Inventory record once it is created. If a record was newly created in the wrong location with these attributes, delete the record following the steps outlined later in this document and recreate the point using Survey123. If there are any related records attached to the inventory point, such as incident, outage, or inspection records, contact the District Champion to coordinate with an eMaintenance Admin on how to proceed.

    f.   When editing records flagged for review in one of the ArcGIS Online Web Apps for an issue such as data/location errors, low photo counts, other types, etc., there may be a delay between when the record was corrected and when the flag is removed from that record. During business hours, this may take between 30 minutes to an hour to update in the system. If a record has been corrected in order to remove the flag yet the flag remains, contact the District Champion to coordinate with an eMaintenance Admin on how to proceed.

5.   If the user has made an error in the record being updated, such as editing the wrong point, the user may choose to cancel out of editing mode and discard any edits that have not been made to the database. Depending on the version of Collector in use, this may show as a trash can icon or a cancel button. Click on it and follow the prompt to confirm discarding the changes.
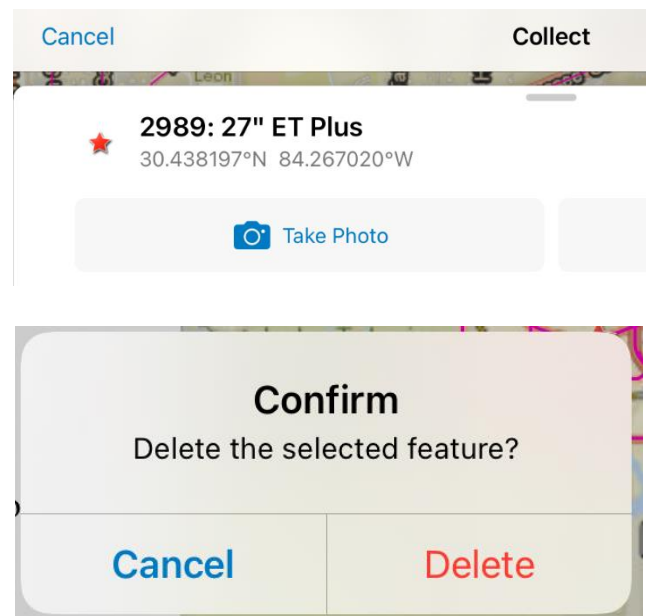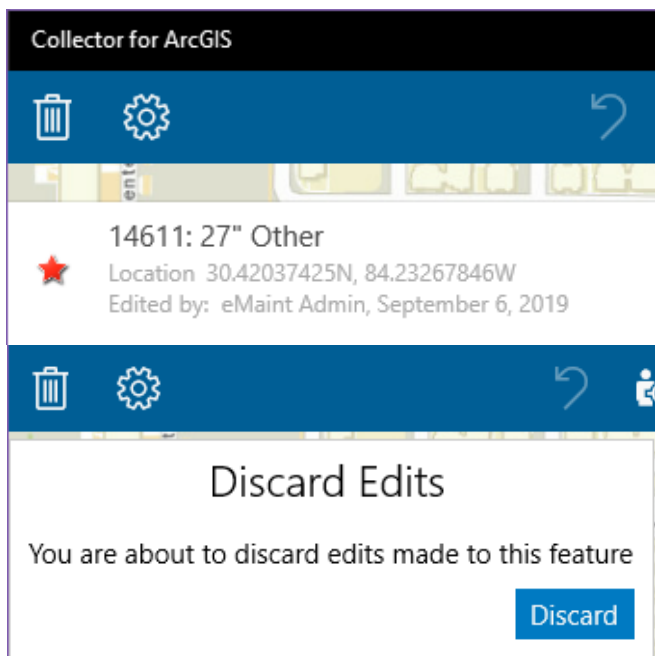

This will discard all changes in the current editing session. However, this cannot be used to reverse changes once they have already been submitted to the database.

6. When the user has completed making the necessary edits, click on the applicable button to save the changes and exit editing mode on that record. Depending on the version of Collector in use, this may show as a submit button with a checkmark or as an update button. Click on it to save the changes and update the database.
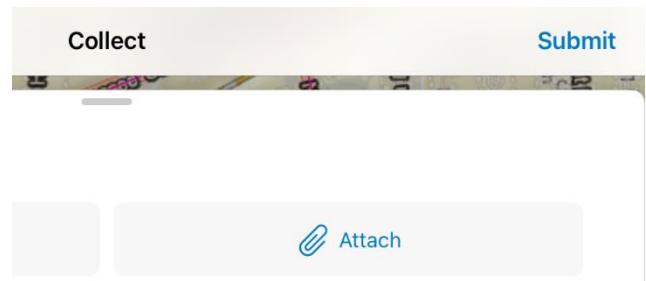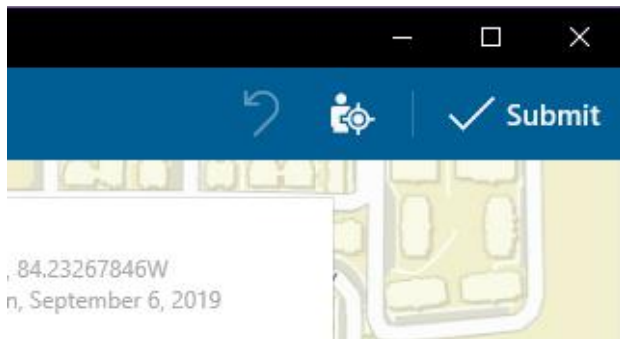
If this button is disabled or greyed out, there may be invalid data stored in one of the fields that is preventing the record from being saved. The user must correct the errors before this button will be enabled.
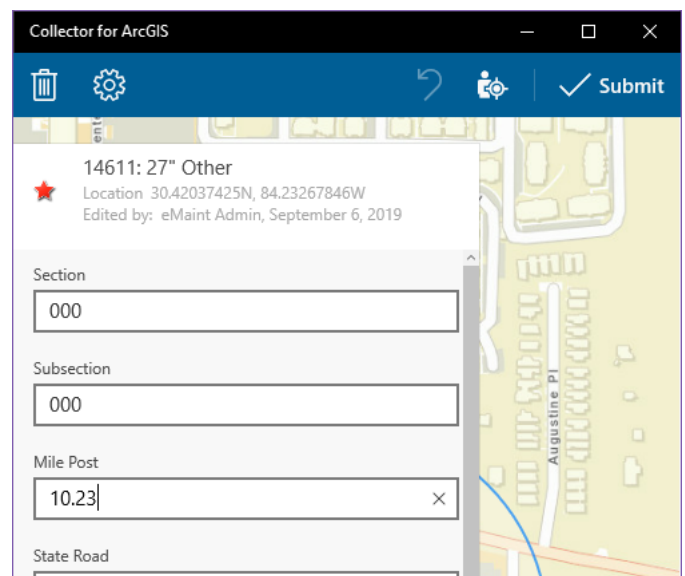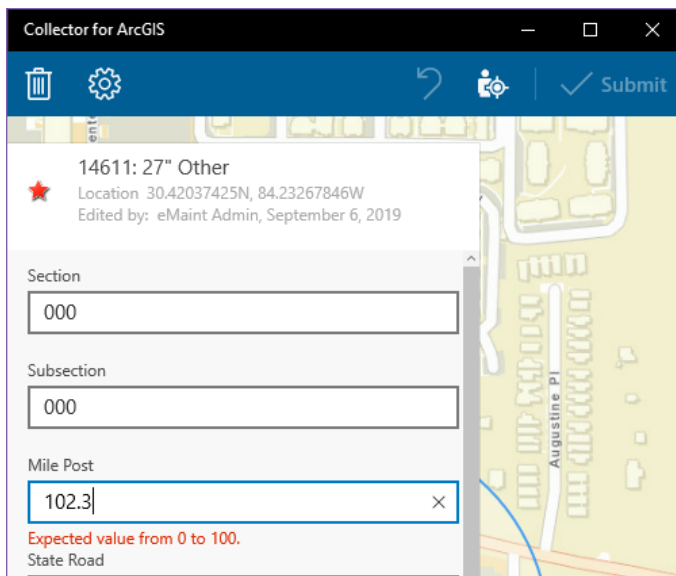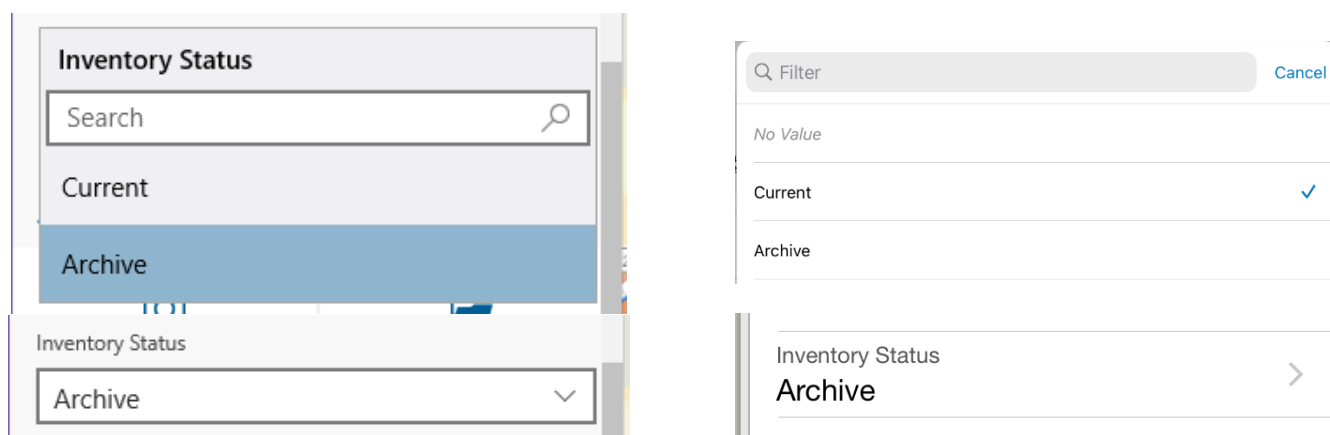
Archiving Records

1. When an inventory asset has been replaced with a new asset, either with the same type or with a different type, the user should use Collector to archive the current inventory record set (including all related incidents, outages, inspections, etc.). This will remove the point from the editing map and protect the record from further edits by other users. After a record is archived, it will still display in the ArcGIS Online Web Apps as a historical record.

    Follow the steps in the editing section above to locate the Inventory record and enter editing mode, then continue to step #2 here.

2. Scroll down to the "Inventory Status" field, which should currently be coded as "Current".

    Change this value from "Current" to "Archive", then click "Done" if applicable.


3. Follow the steps in the editing section above to locate the submit/update button to save the changes, exit editing mode, and commit this record to the archive. Shortly after the change is made, the system will automatically archive all related incident, outage, inspection, etc. records related to the inventory record.

Deleting Records

1. If the user needs to delete a record, they may do so with caution while using Collector. For example, if there is a duplicate inventory record or incident record that was created in error, these steps may be utilized. However, the user should be aware of the following:

   a. Once a record has been deleted, there is not an "Undo" button to reverse the change and restore the record. The record and its associated data and attachments will be removed from the database. The record will need recreated using the established method in Survey123 to return it to the database.

   b. For certain record relationships, deleting one record will delete all records related to it. For example, deleting a lighting Inventory point will also delete all related Outage records and attachments, while deleting an ISPE Inventory Point will also delete all related Incident records and attachments.

   However, this does not apply to all relationships. It is possible to safely delete a lighting Load Center point without affecting all related Inventory points and their attachments, but there is not currently a way to modify the Inventory point to relate to a new Load Center while using Collector.

   c. The user should contact and coordinate with their District Champion before proceeding below.

2. When the user is ready to delete the record, click on the applicable button to delete it, which will be located near the editing button. Depending on the version of Collector in use, this may show as a trash can icon or as a delete button. Click on it and follow the prompt to confirm deleting the record set.
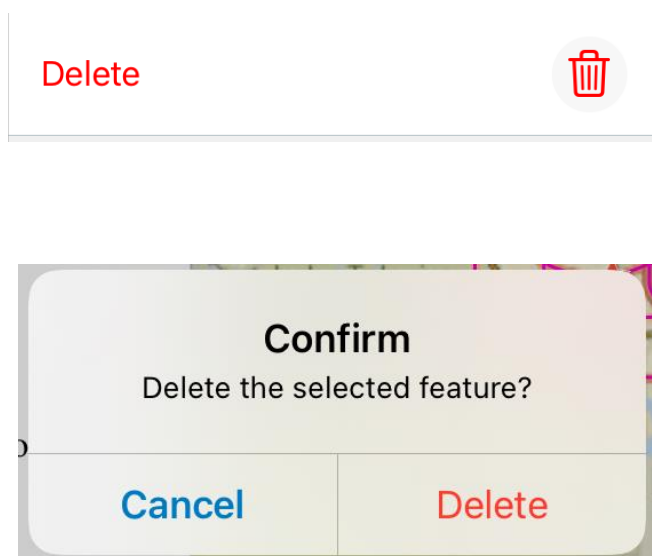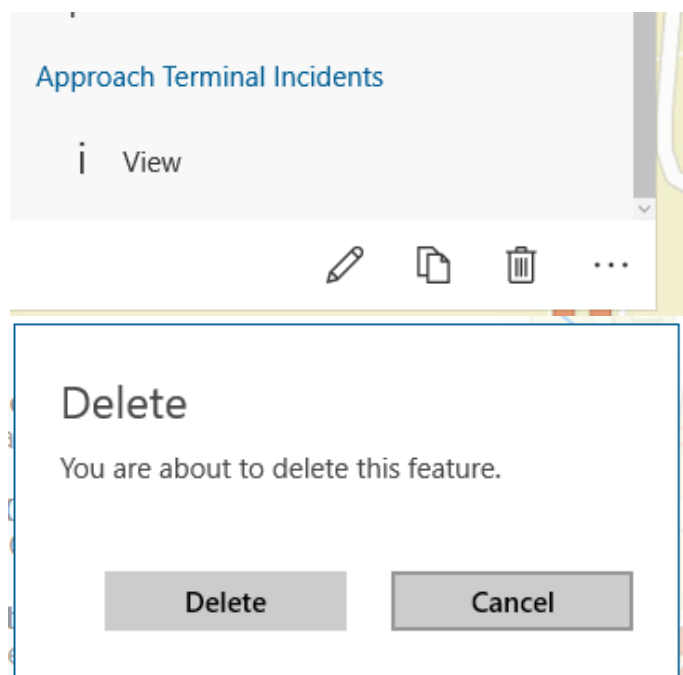
This will immediately delete the current record and attachments, as well as all related records and attachments.