GEO.works™

ADMIN MANUAL

V1.2

06/17/2020

ADMIN MANUAL INDEX

<u>SETTING UP DOCUMENT PRINTOUTS</u>

Recitals

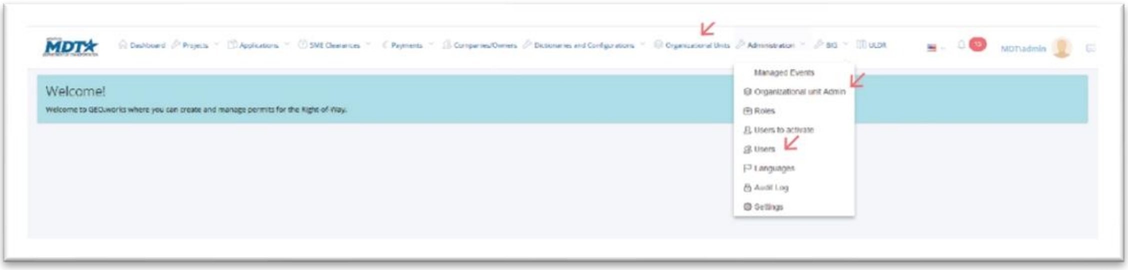
Final Provisions

Traffic restrictions

XSLT template keys

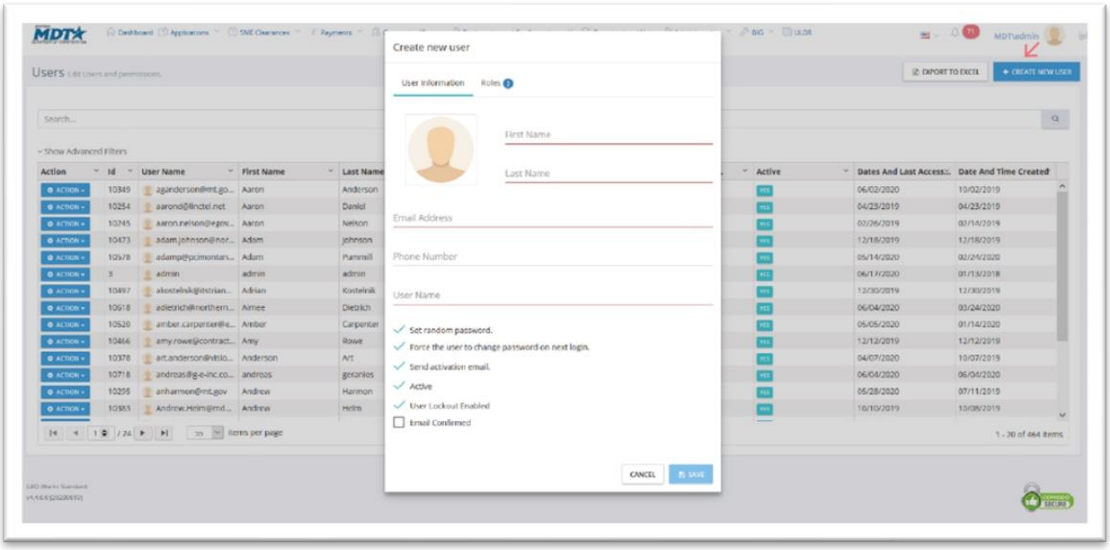
USERS, ORGANIZATIONAL UNITS AND CONTACTS

Administrators can manage Users and Contacts.

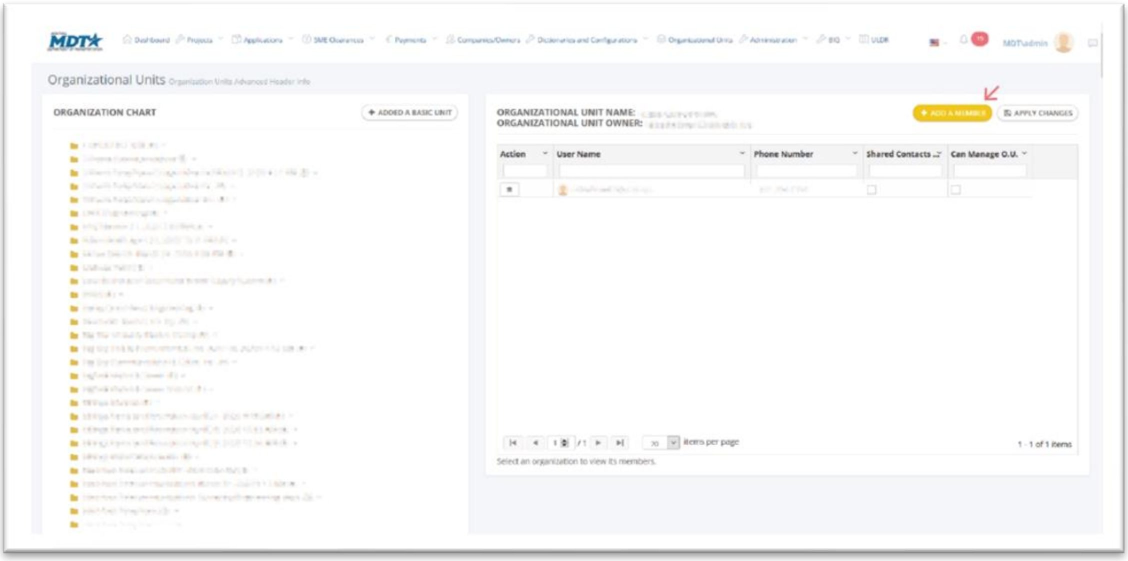


USERS and ORGANIZATIONAL UNITS

Users are people who have registered with a username and password to access the system.
Admin can add new users from interface (from Users page under Administration menu) by clicking on “Create New User” button. A username and an email are mandatory to save the new user. From this page it is also possible to set the roles to the user.



Users can be organized into groups known as Organization Units. Each Organization Unit has an Owner that can manage (add/delete) users and their use of contacts.



The owner of the Organizational Unit can allow other users to make modifications to the Organizational Unit or modify users within the Organizational Unit. Users can be members of multiple organizational units.

To enable the management of contacts, it is necessary to tick "Shared Contacts Manager". This gives the selected user the ability to modify the data and information of the contacts shared within the organizational unit.

To give a user in the Organizational Unit the ability to manage the Organizational Unit tick "Can Manage O.U.". The selected user can then add or delete users and change a user’s settings within the Organizational Unit (make them a Contacts Manager or Organizational Unit Manager).

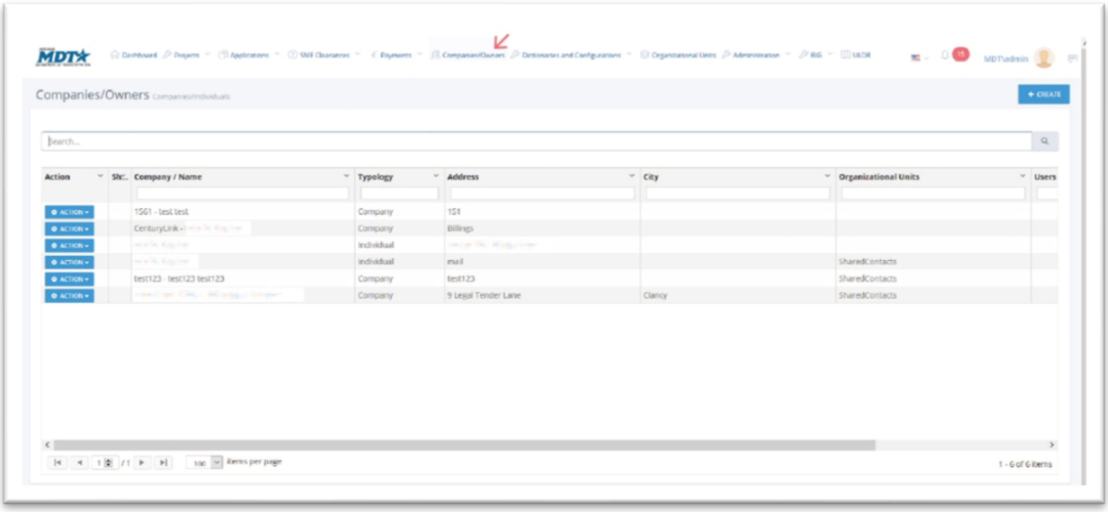
To add a user to the group, click "Add a member" and enter the user's name in the search box.

To delete a user click on the delete icon in the Action column.

CONTACTS

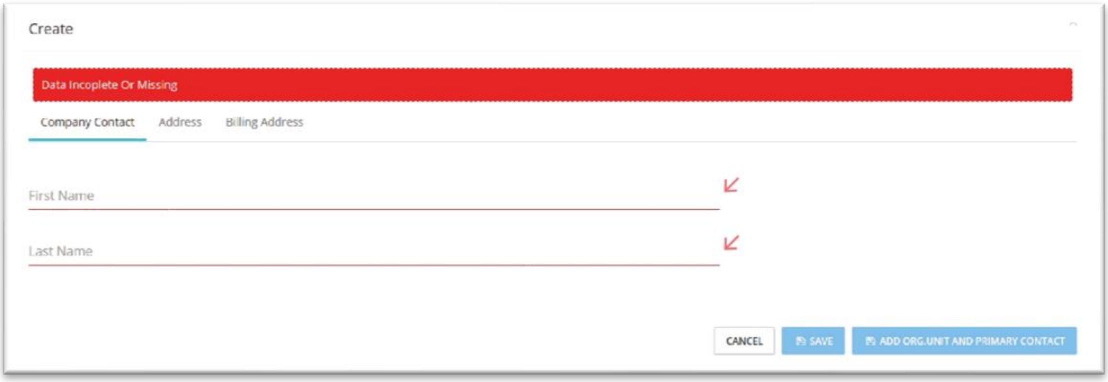
Contacts, that are created and listed in the Companies/Owners Menu, contain the contact information data (address, phone number, etc.) of individual or companies involved with or responsible for the compilation of each request.

- Individuals would be used for freelancers or specific individuals within a company or organization.
- Companies are typically utility companies, contractors and or public authorities.



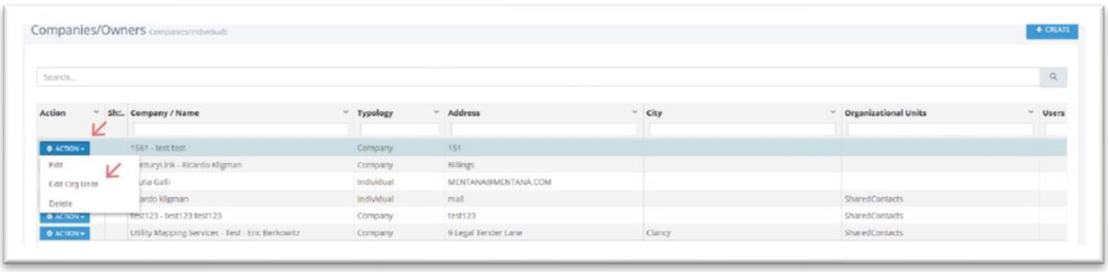
Inside the Companies/Owners Menu, it is possible to insert, modify, share contacts. While adding a contact,

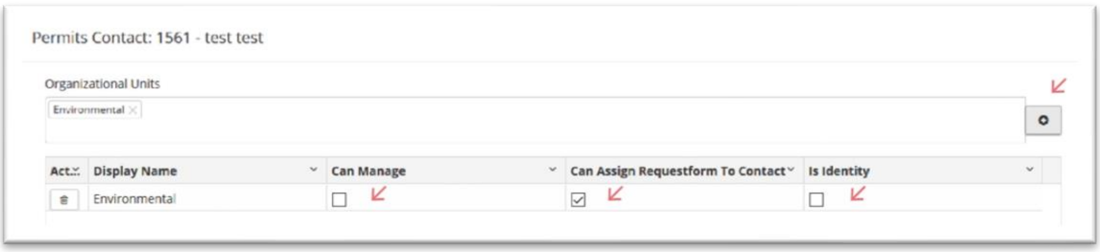
mandatory data fields are marked in red and must be completed in order to save the contact.



Contacts are normally viewable only by the user who created the contact. They can however be shared with other users within the system.

To share a Contact with an Organization Unit, click on actions, and select "edit Organization Unit". Then add or delete the Organization Unit. Each user in the Organization Unit can now use it in the permits.

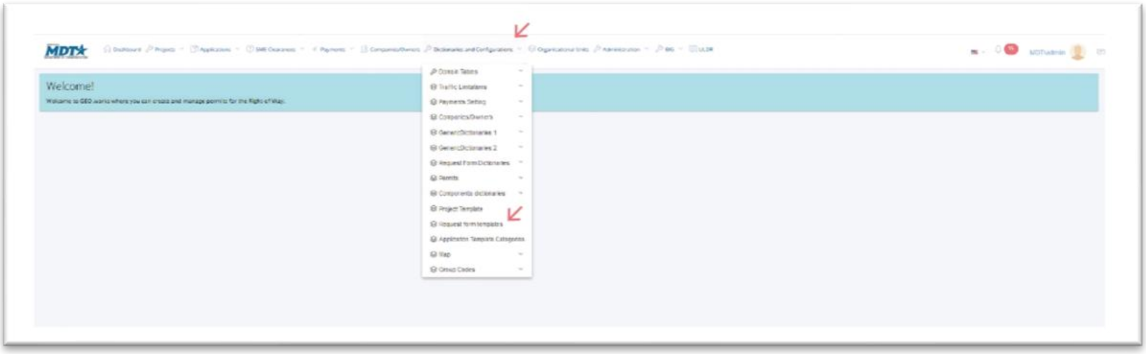




PERMIT WORKFLOW OVERVIEW

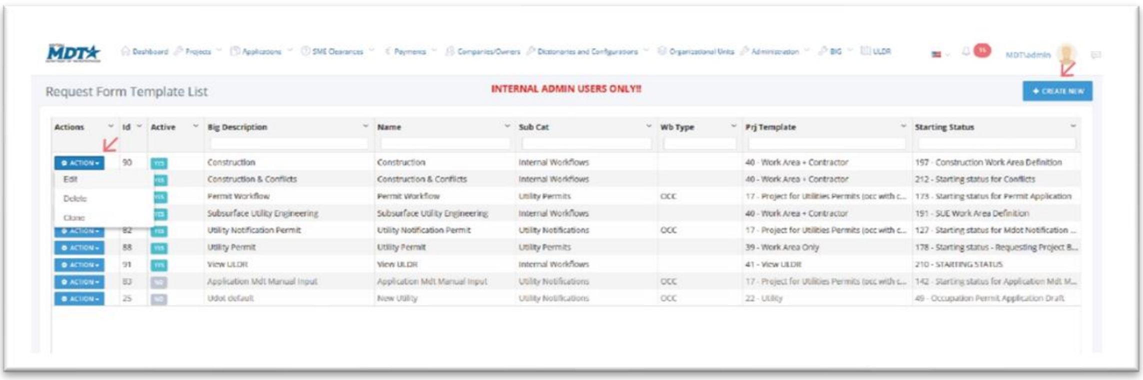
The **Request Form Templates** are the set of steps for the requesting, reviewing, and issuing of a permit application.

To create or modify a Request Form Template click on the **Dictionaries and Configurations** menu and choose the **Request Form Template** item.

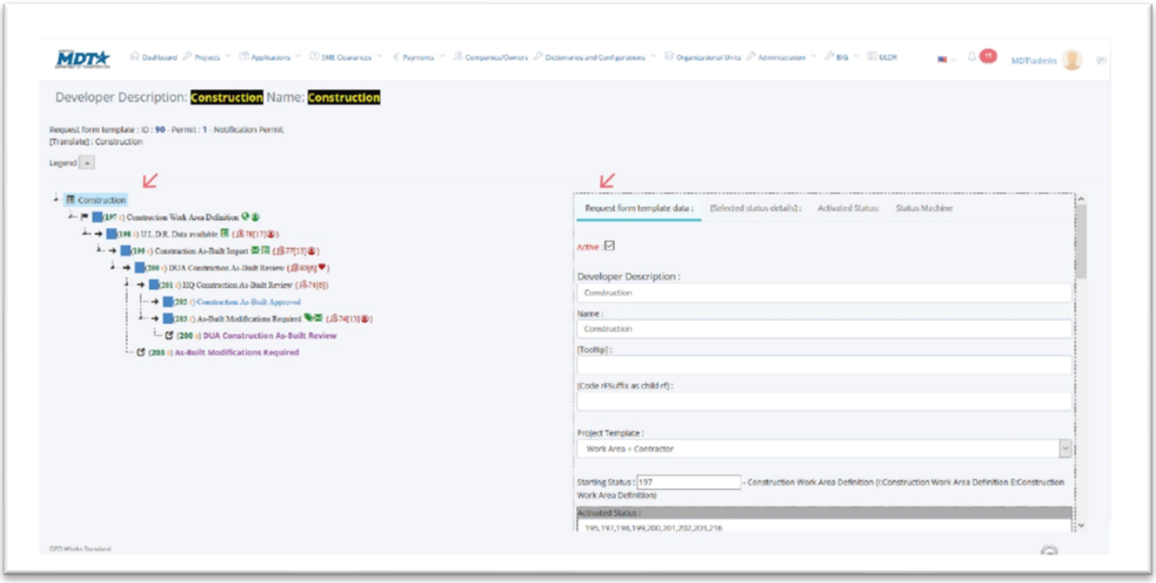


The "Request Form Template List" window list all the currently inserted workflows.
To create a new workflow, click on the **CREATE NEW** button at the top-right of the window.
From the **ACTION** button next to each workflow template it's possible to edit, delete, or clone the workflow template.

Selecting **EDIT** will open a new browser tab with a page containing all the workflow settings.



The page is made up of two sections: on the left is the workflow tree of the selected workflow showing the statuses the workflow is composed of. The panel on the right (Request Form Template Panel) contains the configuration of the selected status.

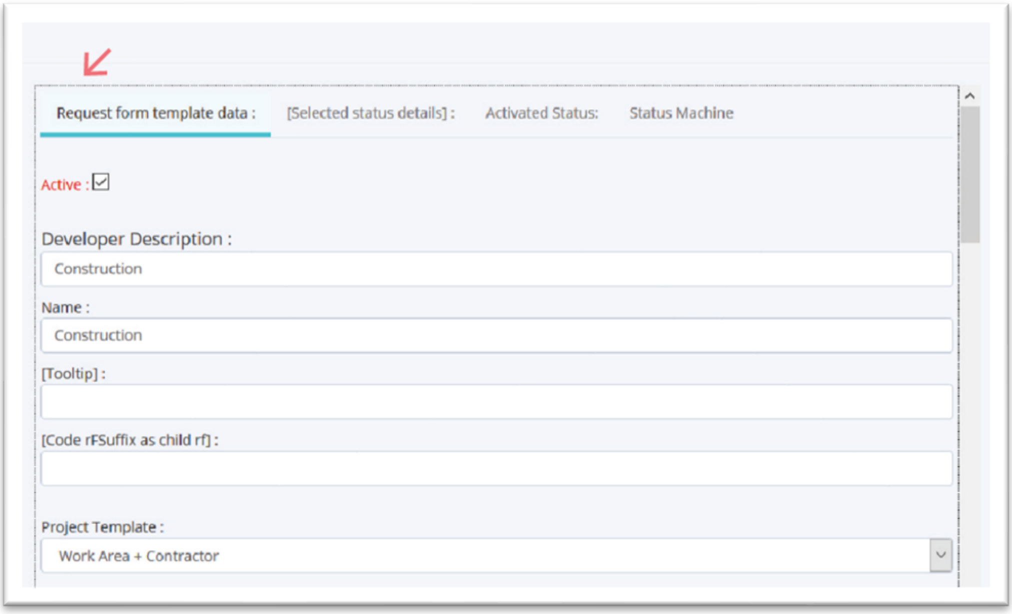


REQUEST FORM TEMPLATE DATA PANEL

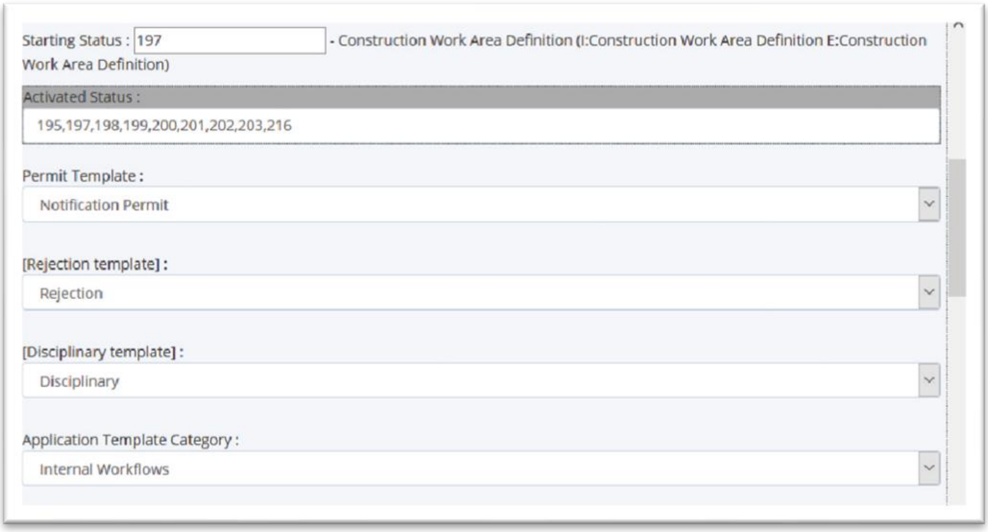
Request Form Template Data

This section shows and allows editing the general settings of the selected workflow. The following describes the sections of the request form template data section:

- Active Checkbox: activates or deactivates the workflow. If this is not checked the workflow will not appear on the **New Application** page
- Developer Description and Name: titles for the workflow (typically the same)
- Tooltip: Provides a description text that appears when you hover over the help button (?)
- Code rFSUFFIX as Child rf: used for workflows that are children of another workflow. Adding a value here adds the value to the end of the parent workflow. For example “PRM” is added to the end of the permit workflow created from the utility permit. The PRM has the same name as the originally created utility workflow with the PRM.
- Project Template: dropdown list showing the selected and available from the **Project Template** page. The template selected defines the tree structure of the workflow; the nodes and data requested within the workflow

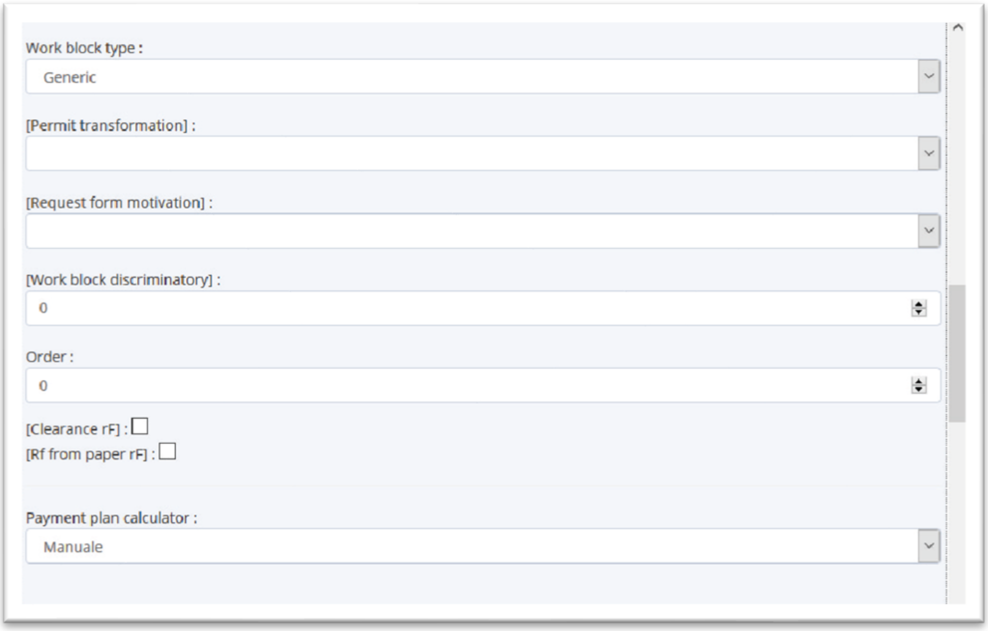


- Starting Status: shows the initial status of the selected workflow. What status is used when the workflow is started by the applicant
- Activated Status: shows all of the statuses that are active for the selected workflow
- Permit Template: allows selecting a document that can be recalled within a single status.
- Rejection Template: allows selecting a document that can be recalled within a single status.
- Disciplinary Template: allows selecting a document that can be recalled within a single status.
- Application Template Category: dropdown list that prescribes the category that the workflow is associated with. These groups can be edited from the **Application Template Categories** under the **Dictionaries and Configurations Menu.**



- Work Block Type: defines the type or category of permit associated with the workflow. The types of permit are - Occupation, Advertisement, Ordinance, or Cut Dig.
- Permit Transformation: allows defining the behavior of the permit at the time of its creation. For new permits, it is always necessary to choose the "new" setting. For derivative/child permits different configurations are available depending on the nodes that need to be copied, be blocked, or be made modifiable. Permit Transformations are preset and cannot be modified from the interface.
- Request Form Motivation: allows setting a generic reason for submitting the application request. Examples include – New Installation, Emergency, etc.
- Work Block discriminatory: a sub-category of the work block type (described above). Uses a numeric code for setting display filters for standard text such as Recitals, Final Provisions, Traffic Limitations

- Order: set the order in which the workflow is shown in the **Create New Application** window
- Clearance RF: checkbox used to define whether the permit is a clearance document or not
- Rf from paper rF: checkbox used to allow entering a code to refer to an existing paper document. Generally used when switching from a paper-based system
- Payment plan calculator: dropdown lists showing potential payment plans or methodology used to compute fees. The payment plan may also include fees referring to the current year or subsequent years for example. These can be configured from the **Dictionaries and Configurations** menu under **Payments Setting**.



The *Segments Config* section shows various dates that can be toggled on. If the dates are toggled on the fields will show on the timeframe node of the workflow tree. The available choices are with default status are shown below:

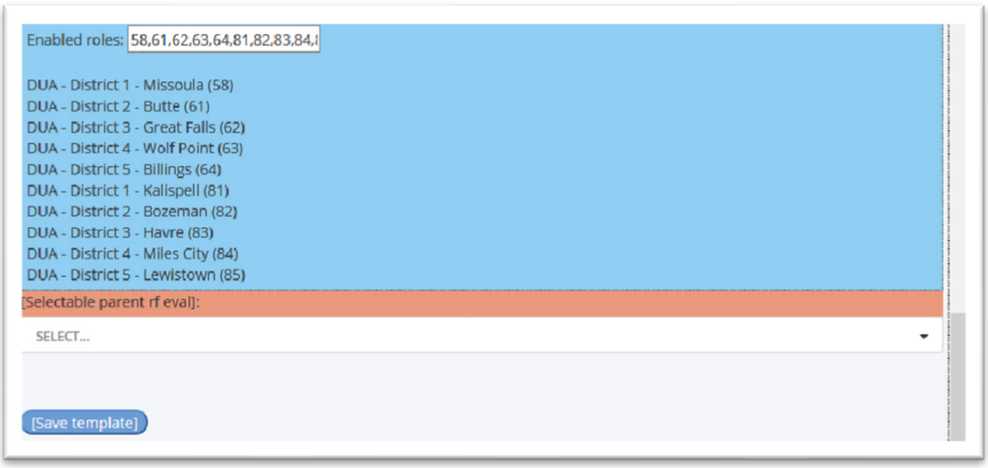
- Show Planning Start At Day: Off – planned start date
- Show Planning Duration Days: On – number of working days planned
- Show From to Hours: Off – show the planned start and end times of day for work

- Show Expected Start End: On – planned end date of work
- Shoe Expected From to Hours: Off – planned start and end times of day
- Show Works Real Start End: Off – actual start and end dates of work
- Show Works Real From to Hours: Off – actual start and end times of day for work
- Show Custom Date Start: Off – shows a start date that is different from the planned, expected or actual start dates for work
- Custom data start: Off – allows entry of a start date that is different from the planned, expected or actual start dates for work

The dates must be activated inside each of statuses to be modified during the permit workflow.

The blue box below the *Segments Config* section lists the Roles that are enabled for viewing and processing the selected workflow.

The **Selectable Parent rf Eval** field allows defining rule conditions that can be selected for linking the workflow to a derivative/child permit workflow. The rule conditions can be configured from the **Dictionaries and Configurations Menu** and then selecting **Generic Dictionaries2** and then **Condition to be Evaluated**.

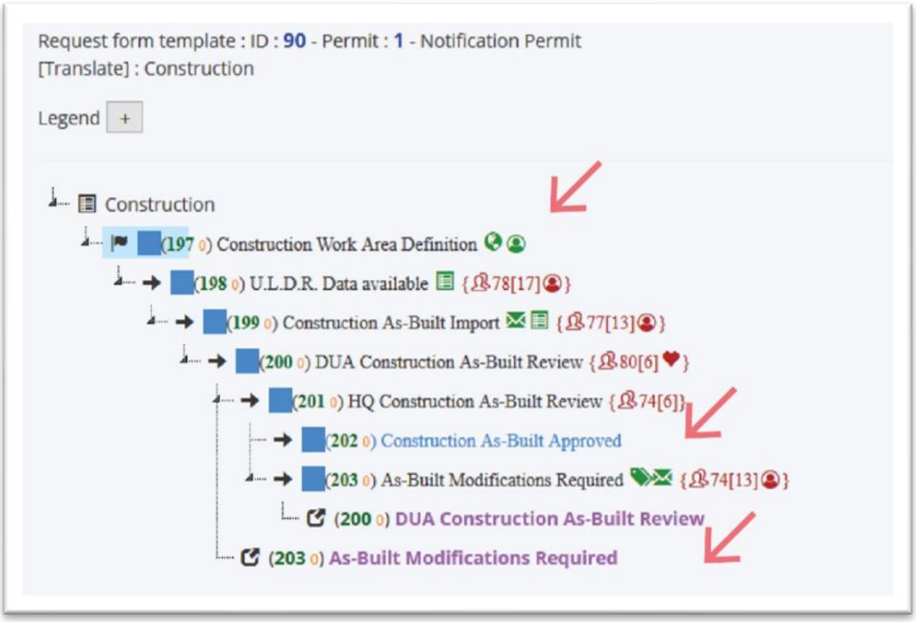


WORKFLOW TREE

The tree of the workflow is on the left side of the Request Form Template page. Workflows are made up of several statuses interconnected to each other. The first status is request status of the workflow. The request status can only be linked to one subsequent status.

From the second status onwards, several successive statuses can be associated. The following summarizes the different statuses and how they are displayed:

- Black Text – request status and other statuses.
- Existing Status - Purple Text – represents a link to an already existing status.
- Final State – Blue Text – final stat status (no successive states). Example: with purple text represent a link to an already existing status. The blue writing statuses represent a final state, that is without successive states.



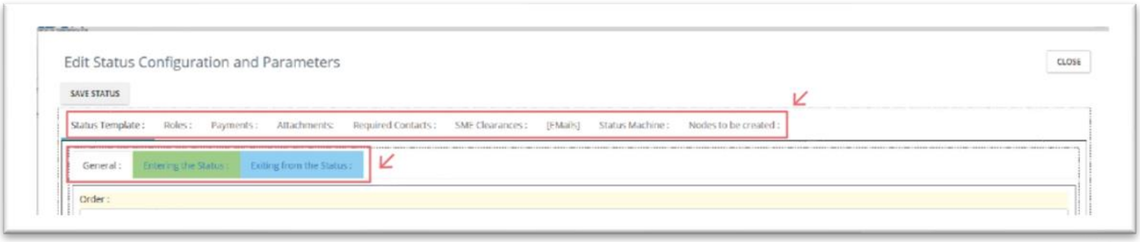
By right-clicking on a state, you can select the following:

- Edit status – allows editing of status options (see below for more detail)
- Add existing status (add a selected existing status)
- Add new status (create a new status or a copy an existing status)
- Delete status – removes that status from the current workflow (the status is not deleted from the database and can be recalled by using the Adding existing status)

Clicking on Edit status opens a page made up of several sub-tabs.

STATUS TEMPLATE TABS

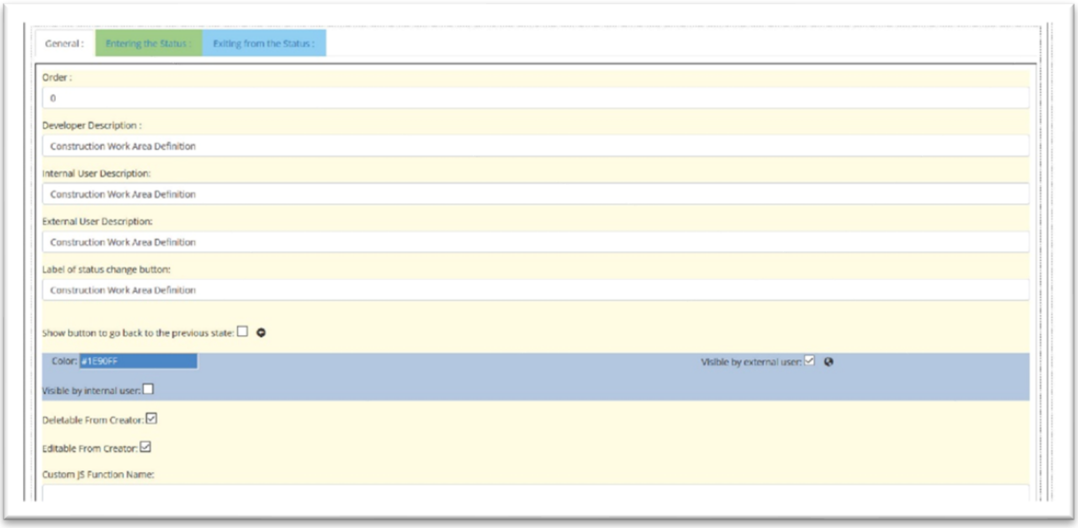
The Status Template tab shows the general settings of the status and the behaviors of the workflow when entering and exiting the selected status. The Status Template tab is divided into "General", "Entering the Status", "Exiting the Status" forms. The following describes the Status Template tab sections and components.



Status Template - General

- Order: allows sorting the sequence of the status change buttons within the permit page
- Developer Description: allows specific names for the status based on role of the user
- Internal User Description: allows specific names for the status based on role of the user
- External User Description: allows specific names for the status based on role of the user
- Label of Status Change Button: text to define the name used for the status change button
- Show Button to go Back to the Previous State: toggle button that if selected adds a button to allow the user to send the application to the previous status of the workflow
- Color: Hex color used for the status. The color specified in this window is used for the status change buttons and to color code the list of permits
    - Visible by External User – defines whether the status is listed in the summary of the workflow for external users
    - Visible by Internal User – defines whether the status is listed in the summary of the workflow for external users
- Deletable From Creator: check box to set option for the user (creator) of the application to delete the application while in the current status
- Editable From Creator: check box to set option for the user (creator) of the application to be able to edit/process the while in the current status

- Custom JS Function Name: controls the function of the workflow when the status change from the current status.
    - goToNextStatus: default value for this field
    - assignToUserAndStatusChanging: use this value if the roles assigned to the status only has a single user (see below)



- Required Protocol: dropdown for selecting a type of protocol for the status
    - Protocols: to edit select Application Protocol under, Dictionaries and Configurations, Request Form Dictionaries
- Required Signature: dropdown for specifying the type of signature
    - Signatures: to edit select Signed Documents under, Dictionaries and Configurations, Request Form Dictionaries
- Document to be generated: allows the selection of a customized document to generate other than the document selected in the general settings for the workflow. This document is generated when exiting the selected state (alternative to the permit, denial, disciplinary selected in the general settings)
- WorkProgressList: dropdown list for specifying the status of work associated with the application (Work in Progress, Work Completed etc.)

The required timeframe information for the status is in a purple box below the WorkProgressList. The selected types of dates are modifiable in the current status. The selections in this section must be compatible with the timeframe selections in the general settings of the template. You can require something that was not created by the workflow.

- Requires Planning Start At Day: planned start date
- Requires Planning Duration Days: number of working days planned
- Requires From to Hours: planned start and end times of day for work

- Requires Expected Start End: planned end date of work
- Requires Expected From to Hours: planned start and end times of day
- Requires Works Real Start: actual start date of work
- Requires Works Real End: actual end date of work
- Requires Works Real From to Hours: actual start and end times of day for work
- Requires Custom Date Start: custom start date different from the planned, expected or actual start dates for work
- Requires Custom Date End: custom end date different from the planned, expected or actual start dates for work

The "Payments additional information" and "Attachments additional information" below the timeframe information allows entry of descriptions or comments correspondence associated with the payments or attachments requested in the "Request Form" node of the file.

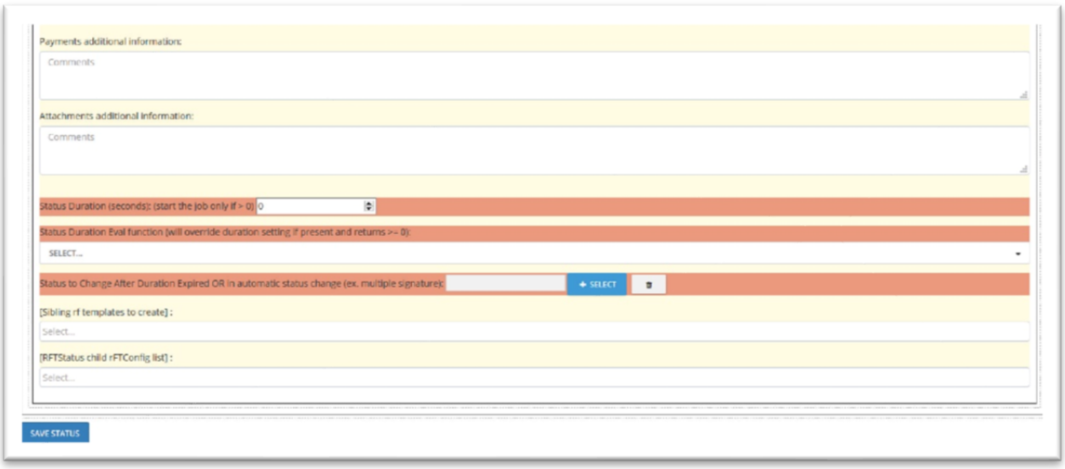
<u>Automated Status Changes</u>
Automatic status changes can be set as part of the last section in the General tab. The change can be a static change defined by the number of seconds since the application entered the current status. The status can also change based on a defined rule.

- Status Duration (seconds): (start of the job only if >0): numeric value in number of seconds from start of the status. If no action taken the application if forwarded to the next specified status
- Status Duration Eval Function (will override duration setting if present and returns >= 0): Rule selected from dropdown
  - Rules can be edited under the Condition to be Evaluated section under Dictionaries and Configurations and Generic Dictionaries2

If setting an automatic status change, it is necessary to specify in "Status to Change After Duration Expired OR in automatic status change (ex. Multiple signatures)" the target status by selecting an existing status and linking it in the workflow tree to the current status.

- "Sibling rf templates to create" defines if, in this status, the permit can be connected to a child-permit.

- "RFTStatus child rFTConfig list": defines whether, in this Status, a child permit can be created by following a specific rule or created automatically. This tool is currently under development and testing.



Status Template - Entering the Status

In the Entering the Status section it is possible to define different types of rules when the status is entered.

- "Calculate RF Workflow Condition with XPath?" allows setting the path of a fillable field of the permit. Based on the value of the field, it is possible to assign the permit to a different set of users. Refer to the section related to roles for more information on how to configure this setting.

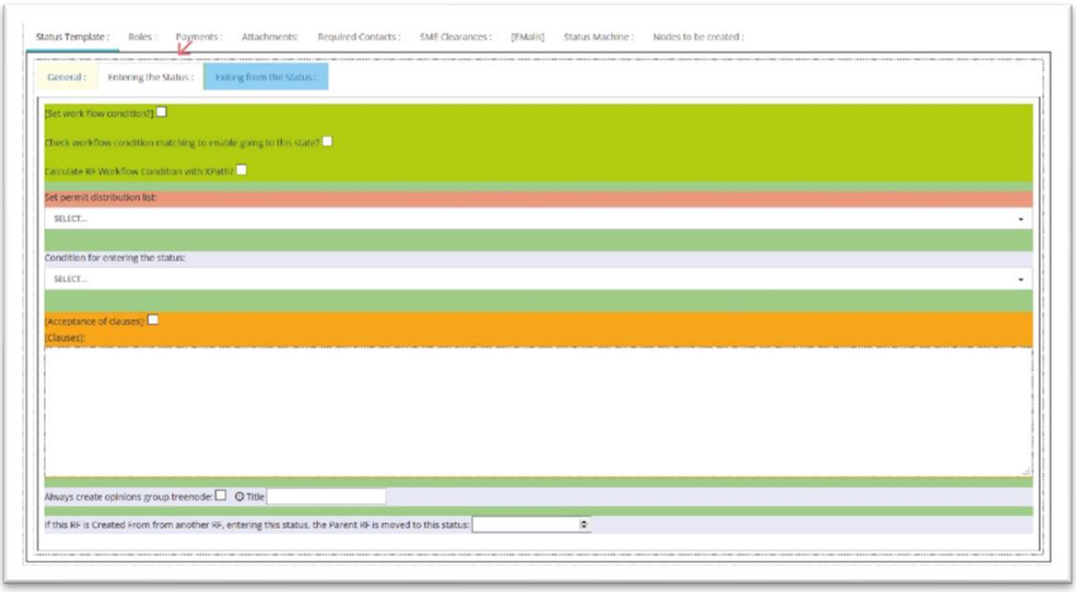
- "Set permit distribution list" is used to select a distribution list for sending email communications upon entering this status.

- "Condition for entering the status" is used for entering the status according to a defined rule.
  The rules can be set from the Dictionaries and Configurations Menu> Generic Dictionaries2, under the item Condition to be evaluated.

- "Acceptance of clauses" makes clauses appear upon entry of the status. The clauses can be, for example, reminders of data to be checked or actions to be taken before entering this status.

- "Always create opinions group tree node" creates a clearances group at the entrance of the status. The clearances group can have a personalized name.

- The field "If this RF is Created From from another RF, entering this status, the Parent RF is moved to this status" allows setting, if the permit is a derivative/child permit, if upon entering this state the mother practice performs a change of status, specifying the state in which the mother permit must enter.
  Attention: the destination status of the parent workflow must be present and connected within the template of the parent workflow.



Status Template Tab - Exiting the Status

In the Entering the Status section it is possible to define different types of rules while exiting the status is.

- "Condition for exiting the status" - used to allow exiting from the status according to a defined rule. Rules can be created using from the Dictionaries and Configurations Menu> Generic Dictionaries2, under the item Condition to be evaluated.

- "Close all open requests" - makes it mandatory to close integration requests before leaving the state.

- "Set Release date and release office on Permit" - allows recording the date and time of the status change within the summary. The date and time can be called up within the permit documents.

The Will override setting from ‘Document to be generated’ settings will create the selected document(s) when exiting the selected status:

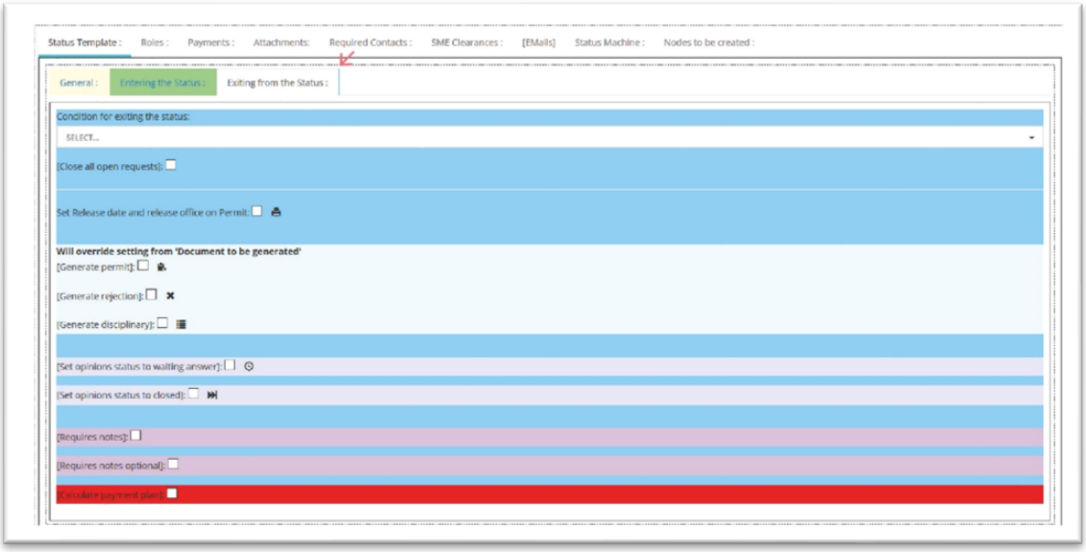
- General Permit
- Generate Rejection
- Generate Disciplinary

- "Set opinions status to waiting for an answer" - defines whether or not new options are created when exiting the selected status.

- "Set opinions status to closed" – defines whether or not the system closes the opinions when exiting from the selected status.

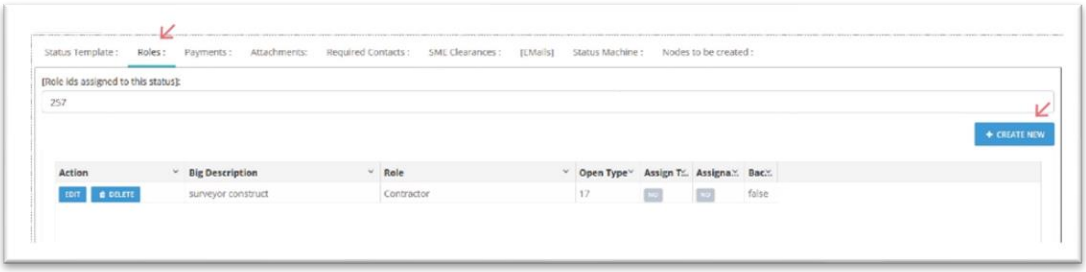
- "Requires notes" and “Requires notes optional” – if selected a text box will appear and require notes to be entered before exiting the current status. The second setting allows making the notes optional.

- "Calculate payment plan" - check box used to specify the calculation of a payment plan when leaving the status.



ROLES SECTION

This section lists all the roles assigned to and that are able to work on the application while it is in the selected status. To add a new role to the list, use the "CREATE NEW" button. To edit a role on the list click the “EDIT” button to the left of the role description and to the left of the “DELETE” button. To delete a role from the list click the “DELETE” button next to the role you want to remove.



The following describes the parameters for creating a new or editing an existing role:

- “Internal Description” and “Description” - text fields to describe the role being created or edited. There are no specific rules for creating the descriptions as they are not taken from and do not need to be the same as the name of the Role saved under the Administration menu.

- “Role” – dropdown list showing the Roles created within the system (see Roles under the Administration Menu).

- "Open Type" - a dropdown list of codes that define the action(s) the user can perform on the nodes of the permit tree. Open types are preset and cannot be modified from the interface.

“Assign to qualification” – dropdown where you can set a qualification (contact type) for the selected Role. This include the following:

- Emergency Contact
- Contractor
- SUE Company
- Surveyor

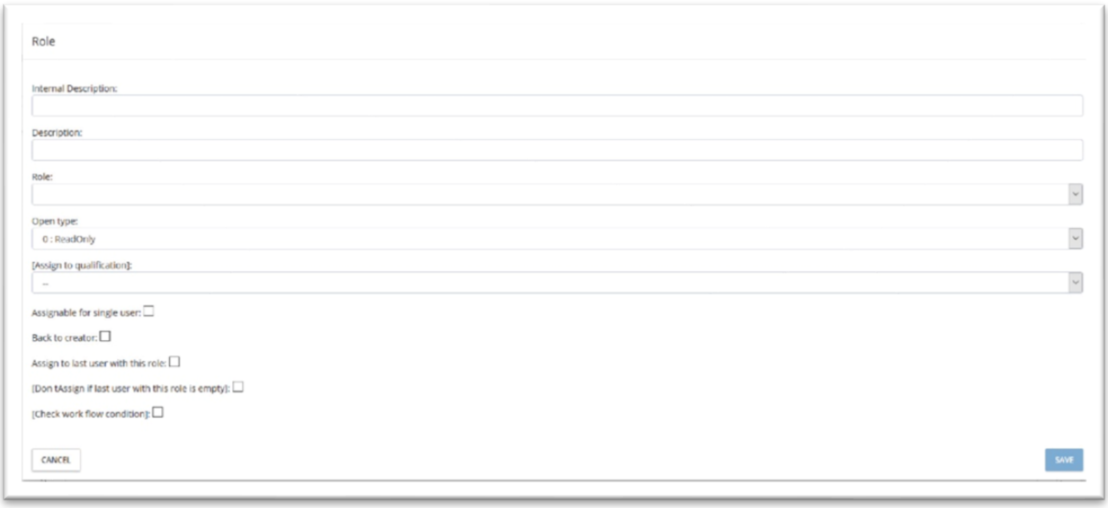
The checkboxes are used to toggle on or off the following parameters:

- “Assignable for single-user” - choose a specific user to assign the permit in the current status

- "Back to the creator" - reassign the permit to the user who created the application

- "Don t Assign if the last user with this role is empty" – forces the system to not assign the permit to the role if the role has no user linked to it

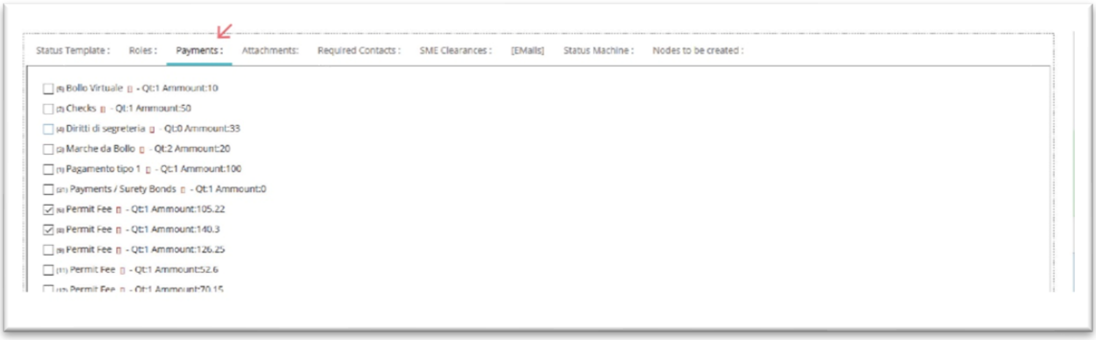
- "Check work flow condition value" - select this feature to have the system check for the value. The values depends on the condition rule set in “Entering the Status” section.



PAYMENTS SECTION

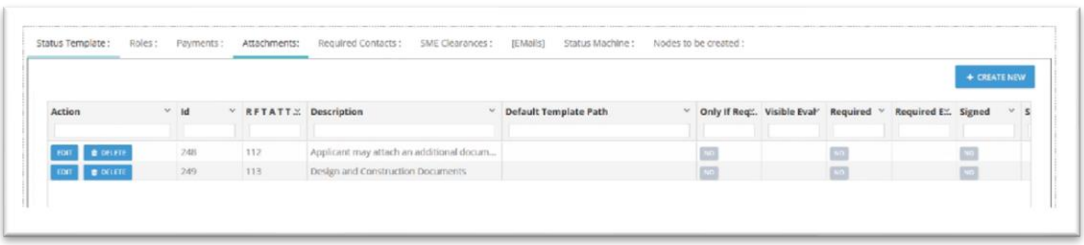
Shows all the fixed payments that can be activated or associated with the selected status.

These payments can be created/edited from the Dictionaries and Configurations> Request Form Dictionaries menu, under the Payments item.



ATTACHMENTS SECTION

The attachments section contains a list of required attachments for the selected status. To add a new attachment to the list click the “CREATE NEW” button. To edit an attachment in the list, click the “EDIT” button next to the delete button. To delete and attachment from the list click the “DELETE” button next to the attachment.



Clicking “CREATE NEW” or “EDIT” brings up the parameters that can be set for the attachment:

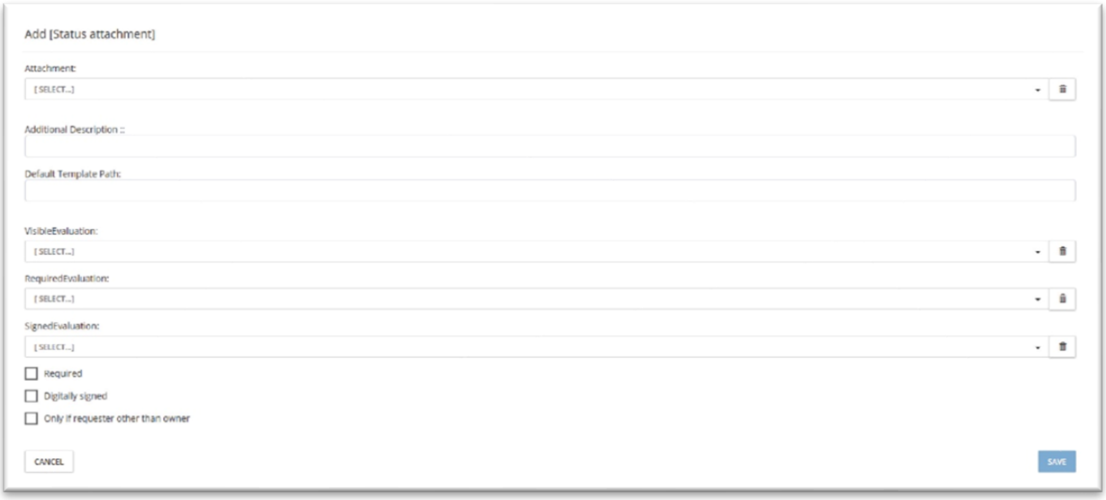
- “Attachment” – dropdown menu showing a list of possible attachments to choose from. The attachments can be set from the Dictionaries and Configurations> Request Form Dictionaries menu, under the Attachments item.

- “Additional Description” – text for adding more descriptive information about the attachment.

- “Default Template Path” –

- “VisibleEvaluation” , “RequiredEvaluation” , “SignedEvaluation” allow to set visibility, requiring evaluations and signigning evaluation by rules. Rules can be created using from the Dictionaries and Configurations Menu> Generic Dictionaries2, under the item Condition to be evaluated.

  The check boxes at the bottom can be toggled on or off to set whether or not the attachment is Required, Digitally signed, or Only if requires other than owner (displayed in cases where the applicant is different from the permit owner).

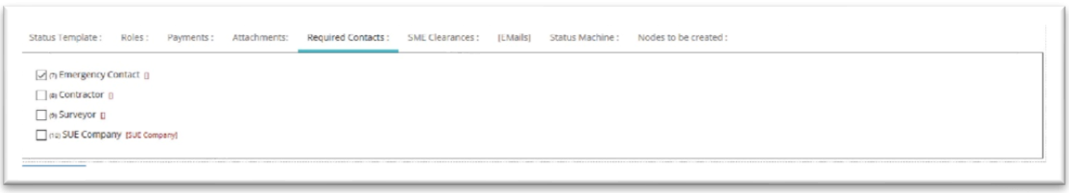


REQUIRED CONTACTS

Displays a list of contact types that can be required in the selected status.

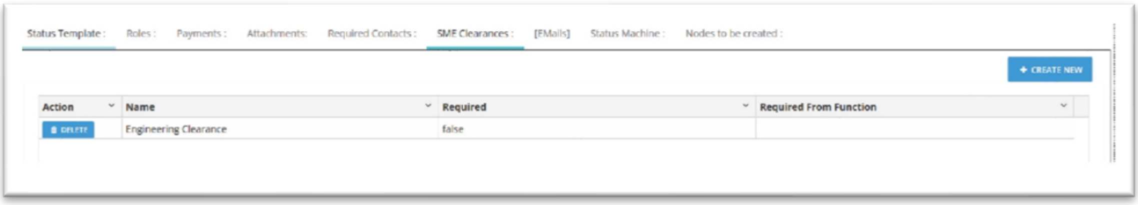
> Warning: to appear within the permit tree, the "contacts" node must be present inside the project template associated with the request form template.

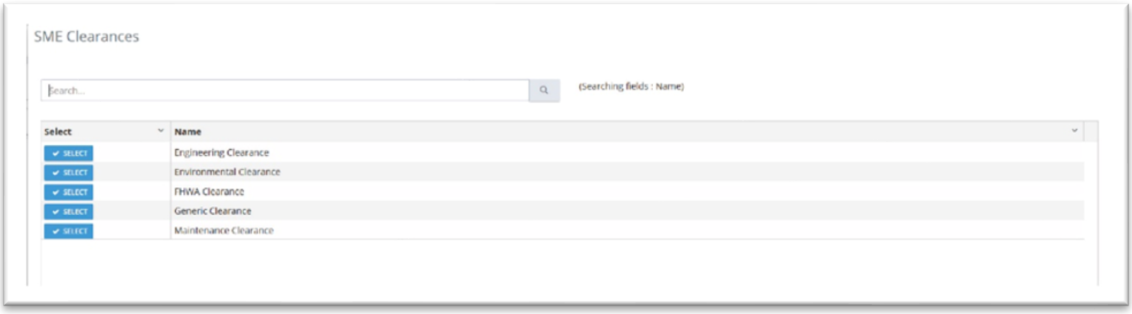
The contact types can be set from the Dictionaries and Configurations> Generic Dictionaries 2 menu, under the Qualifications item.



SME CLEARANCES SECTION

The SME Clearances section contains a list of the types of SME Clearances that can be requested. To add a clearance to the list click the “CREATE NEW” button and select the desired clearance request to add. To remove a clearance request from the list click on the “DELETE” button next to the clearance request type.



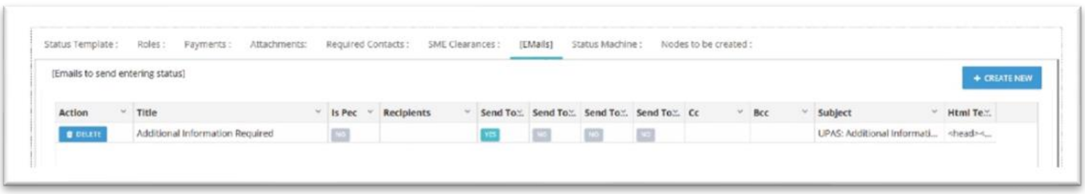


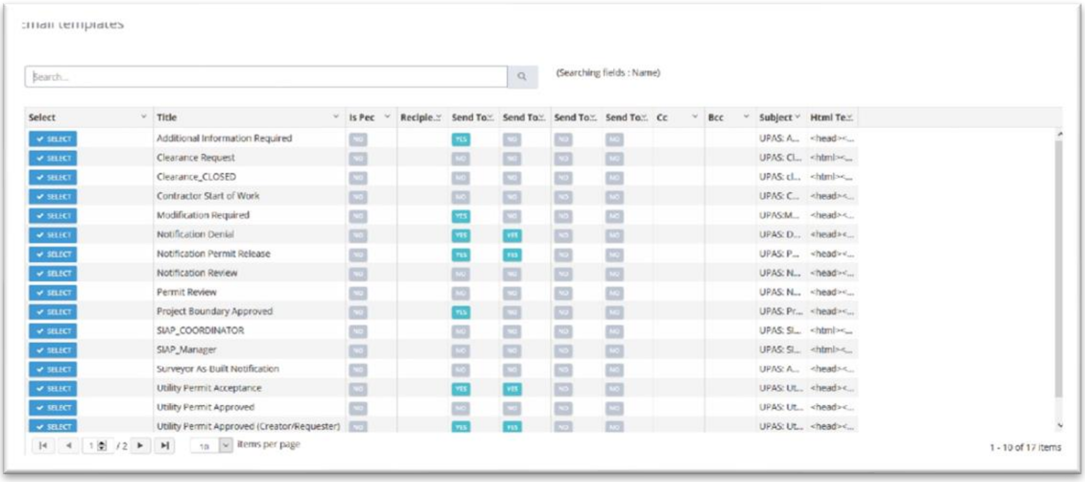
The specific settings of the SME Clearances and the text can be set from the Dictionaries and Configurations> Generic Dictionaries 2 menu, under the RFT Opinions.

EMAILS SECTION

The Email section allows selecting and configuring the email templates to use for the selected status.

The email template settings and the text can be set from the Dictionaries and Configurations> Request Form Dictionaries menu, under the E-mail templates item. The settings can not be changed or updated in this section.





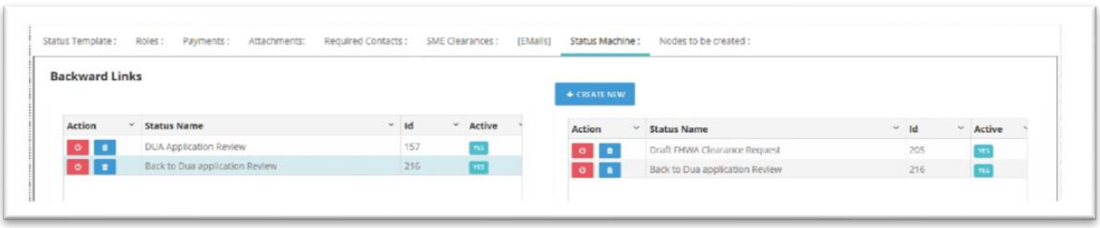
STATUS MACHINE SECTION

The status machine section contains two panels. On the left panel (Backward Links) are all the statuses preceding the selected status. The right side shows the statuses following the selected status.

To add a new status click the “CREATE NEW” button which will add the new status to the current status.

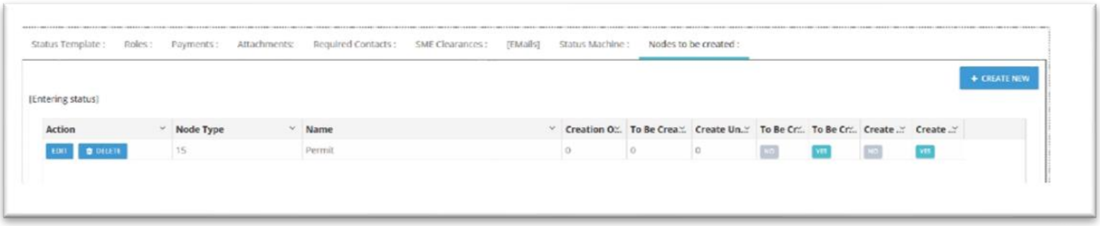
Status that are listed can be either deleted or toggled on/off using the actions to the left of the status.

> **<u>Attention: activating or dactivating the status in this section impacts the whole workflow</u>**



NODES TO BE CREATED

In the Nodes to be Created Section, it is possible to set the automatic creation of a new nodes within the permit tree in from the selected status.



To add a node click on "CREATE NEW button to add the parameters for creating the new node. Click the “EDIT” button to edit the parameters and click the “DELETE” button to remove the rule.

After clicking EDIT for CREATE NEW the form for setting the parameters can be set:

- "Creation order": defines the order of appearance of the node (starts at 0)
- “To be created_Discriminatory”: numeric field that defines properties of the created node;
- "Create under_Discriminatory": defines additional properties for the connection to the node under which it is created;
- "ToBeCreated_NodeType": drop down list that defines the type of node to be created
- "CreateUnder_NodeType": drop down list that defines under which node to add the new node;
- "To be created_Field to be completed": defines whether the compilation of the node is mandatory
- "To be created_Place holder": defines if the created node is a placeholder;
- "Create under_Each of this node type": defines if the node is to be created under each of the nodes of the type selected in "CreateUnder_NodeType" ;
- "Create under_Only if not already exist": sets whether the system creates the node only if it is not already existing within the file tree.

CLEARANCES

Geoworks allows sending requests for clearances to Offices or professionals through the Clearances tools.

The Clearances tool allows sending requests to one or multiple users at once. Requests and responses are collected within the permit tree.

The recipient can answer requests for clearances from the web application or sending a reply via an email.

The response through the portal has advanced features, i.e. the acknowledgement of positive, negative results and prescriptions settings.

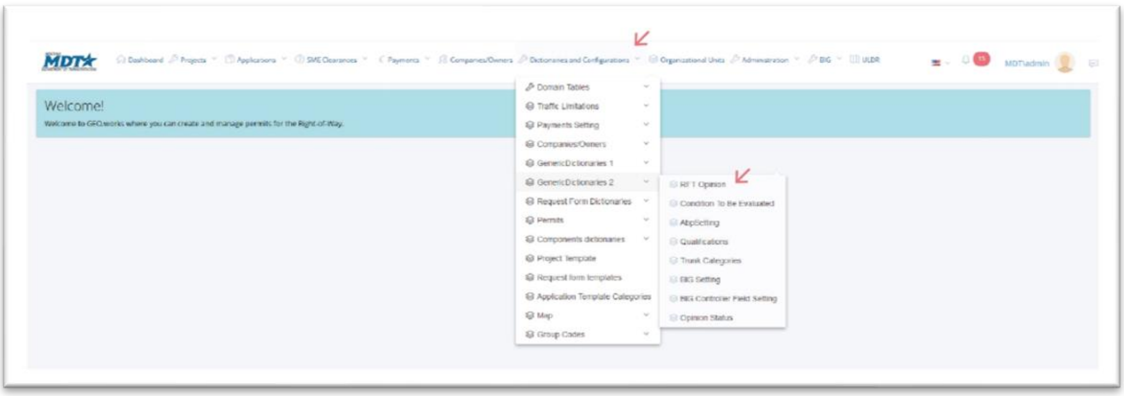
The reply by email is used if the recipient does not use the portal. The recipient will receive an email from the web application to reply to. The web application collects the email answers within the permit tree but cannot recognize the positive or negative outcome.

When the responses to clearances are received, it is possible to set an automatic change of status of the permit workflow. The automatic status change eases the requester in distinguishing the permits that are still waiting for a response from those that have already received all of them.

CLEARANCES REQUESTS: CLEARANCES MENÙ

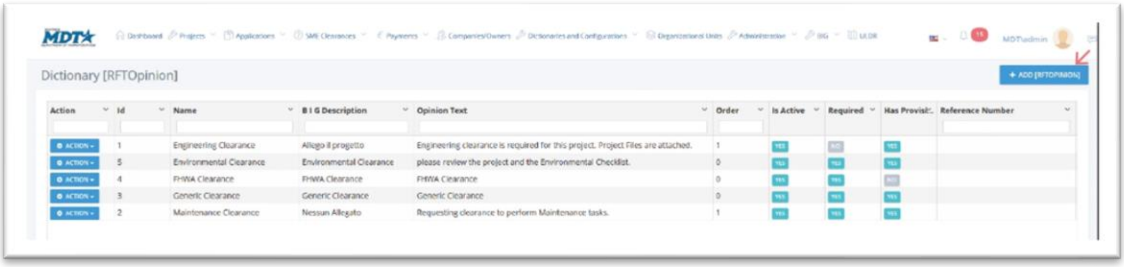
From the interface, it is possible to set different types of clearances requests and their working principles once they are brought up into the permit tree.

To access the Clearance settings, click on the Dictionaries and Configurations menu> Generic Dictionaries 2> RFT Opinion.



In "RFT Opinion" section, the clearances requests types saved in the system are listed. General settings are shown inside the table columns.

To add a new type of clearance, click "Add RFTOpinion" at the top right.



Fill in the following listed fields to save a new RFTOpinion:

- "BIG_Description" is the name used by developers, it can coincide with the "Name" or provide a brief description of the use of the clearance.

- "Name": Name that will be displayed on the interface within the permit tree.

- "Opinion Text": allows you to set a default text that will be automatically proposed to the clearance requester. The text is always editable from the permit tree interface at the time when the user creating a clearance request.

- "Order" sets the order in which the clearance will appear within the permit tree, in case of multiple clearance requests

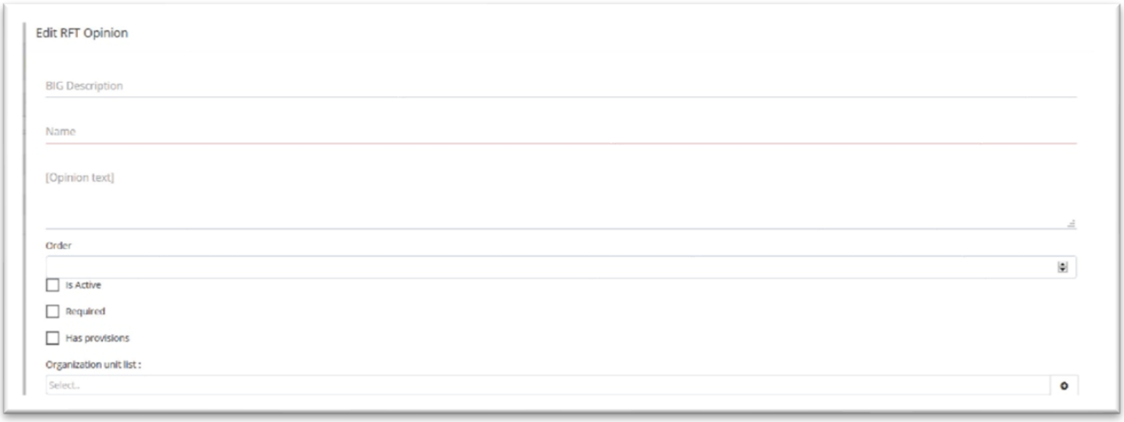
Checklist:

- "Active": active clearances can be selected at the time of creating a new request. If it is not active, it will not appear in the dropdown selection list.

- "Mandatory": the response to this clearance is mandatory and blocking; the permit workflow is blocked without this response.

- "Has Provisions": allows adding prescriptions within the clearance answer window.

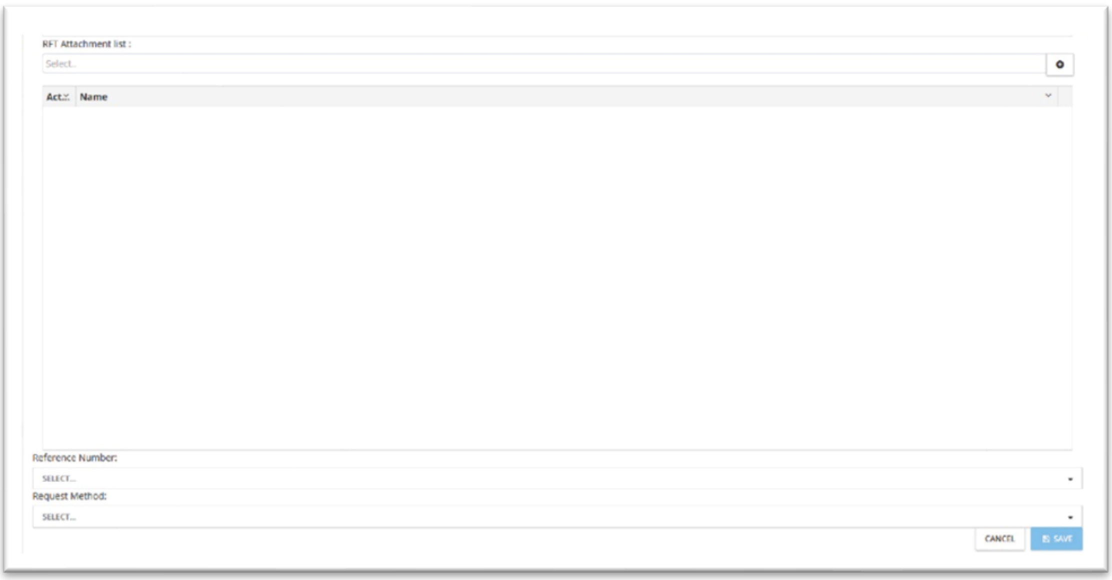
"Organization Unit List": allows selecting a group of users to whom to send this type of clearance



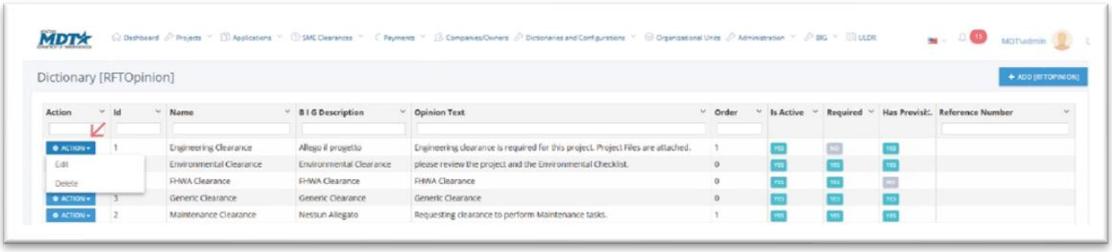
- "RFT_Attachment list": allows selecting a type attachment to the clearance request form.

- "Reference Number": allows you to set a registry for sending and receiving clearances.

- "Request method": allows selecting if the clearance answer will be received by the web application or by email, as described above.



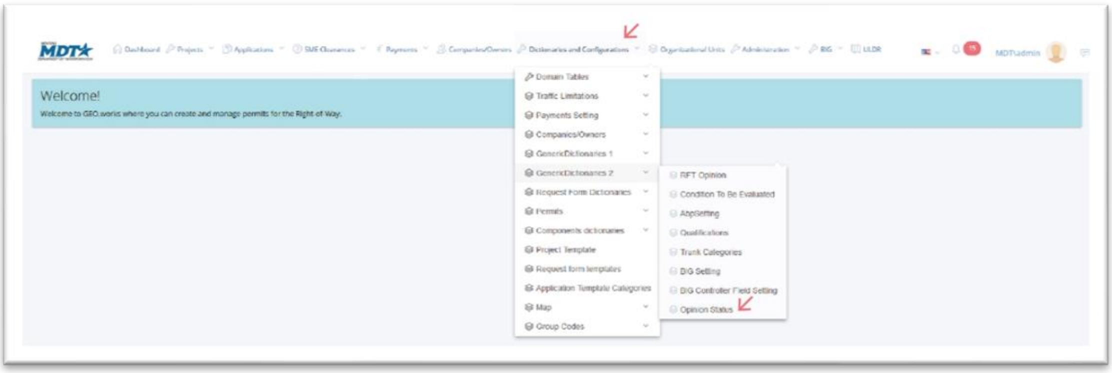
To edit or delete an existing clearance request from the list, click on "Actions" and select "edit" or "delete".



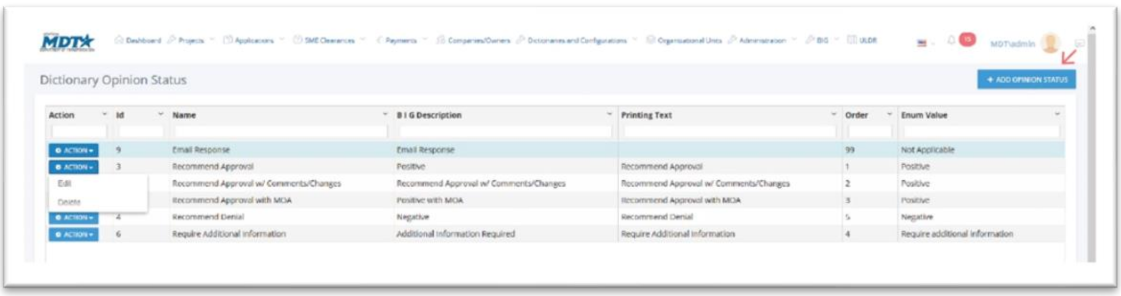
OPINION STATUS DICTIONARY/MENU

From the interface, it is possible to set different types of clearances answers and their working principles once they are called up within the permit tree.

To access the Opinion Status Dictionary, click on the Dictionaries and Configurations menu> Generic Dictionaries 2"> "Opinion Status".



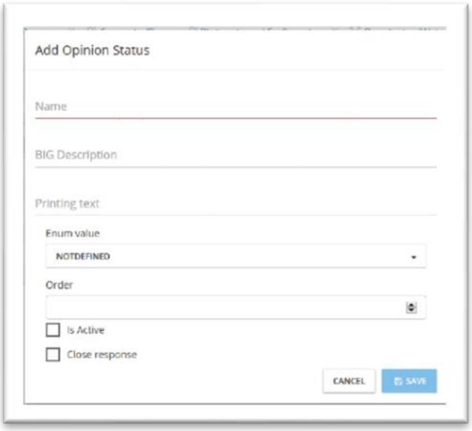
To add a new answer type on click "Add Opinion Status"



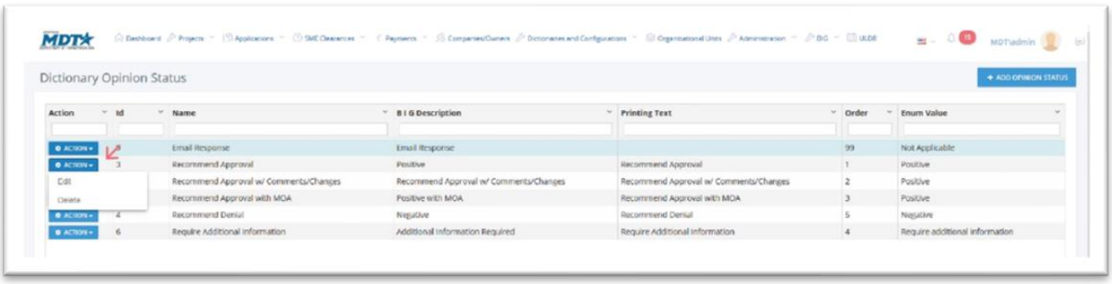
The opened window shows the following settings:

- "Name of the opinion status": allows naming the status of the clearance response.

- "BIG Description": allows naming the response status for developers.
- "Enum Value": is used to categorize the response to the clearance into different items (positive, negative, conditional, not applicable, require additional information, with provisions).
- "Order": allows sorting the clearance request in a group of clearances requests within the permit tree.
- Check "Active": makes the response status selectable in the dropdown inside the response window within the permit tree.
- Check "Close Response": Closes the clearance request. This check is necessary to set the automatic status change of the permit workflow.



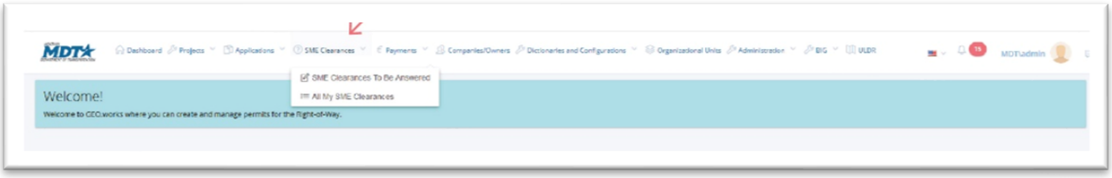
To edit or delete an existing status from the list, click on "Actions" and select "edit" or "delete".



CLEARANCES MAIN MENU

The Clearances menu is one of the main menus on the top bar.

The Clearances menu is divided into the sections "Clearances to be answered" and "All my Clearances".

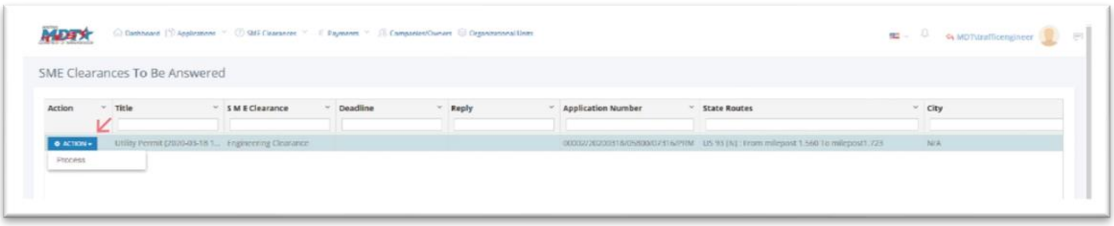


Warning: the main menu "Clearances", and the corresponding subdivisions, is active only for roles with active Clearances viewing permission. To activate the visualization for one role, access the "Administration"> "Roles" section, and modify the role's permissions.

"CLEARANCES TO BE ANSWERED" SECTION

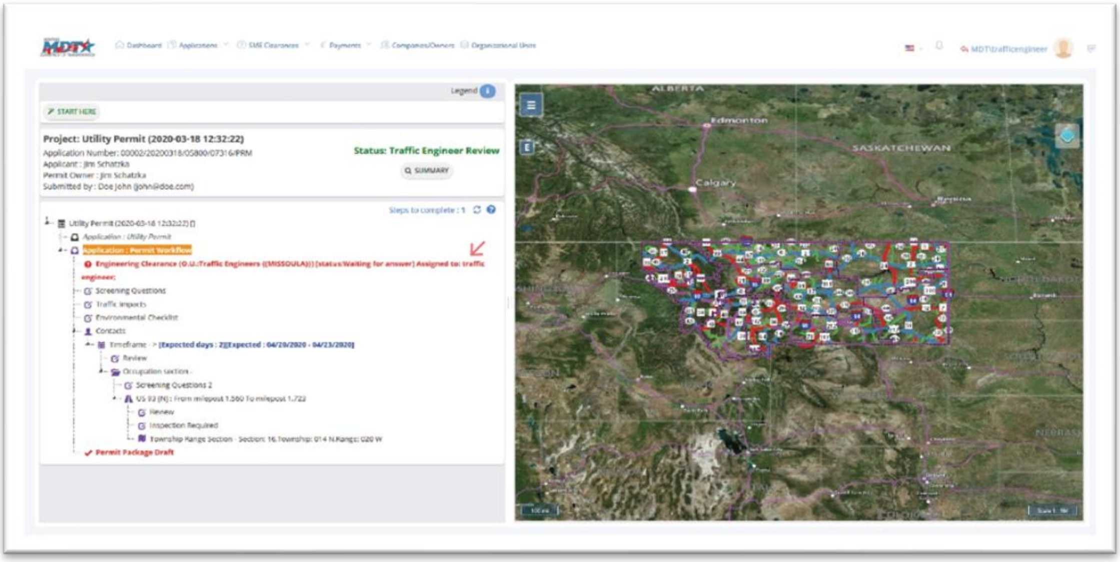
"Clearances to be answered" section lists all clearances awaiting a reply by the user.

To process a permit from the list, click on "Actions"> "Process".

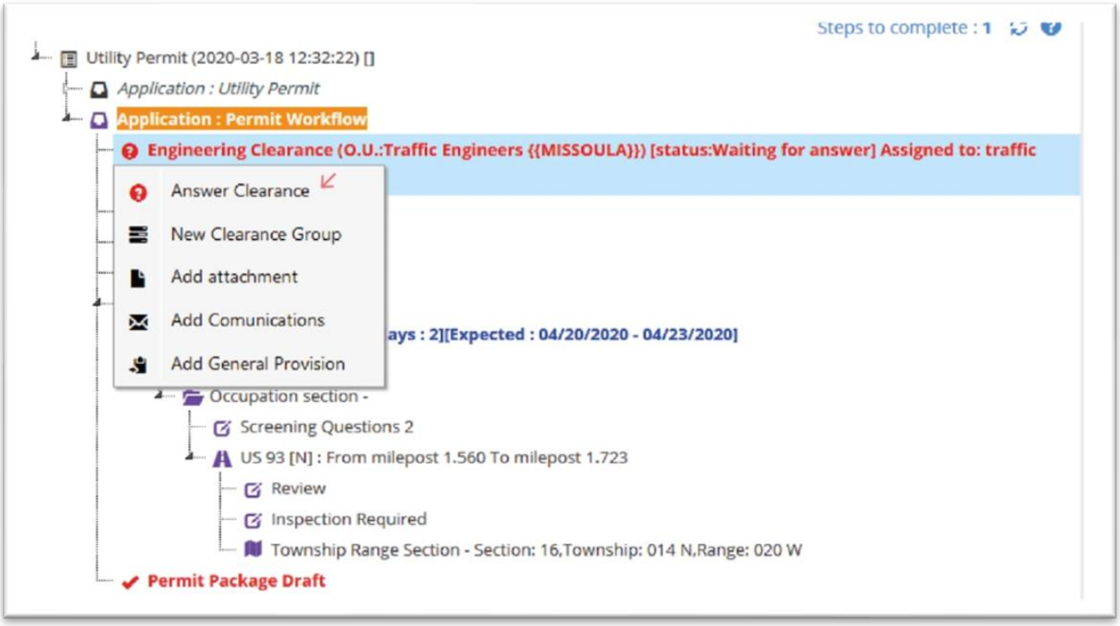


After clicking "Process", the permit page which includes the clearance request opens.

The user can then view all the data and attachments inserted by the applicant inside the permit tree branches.



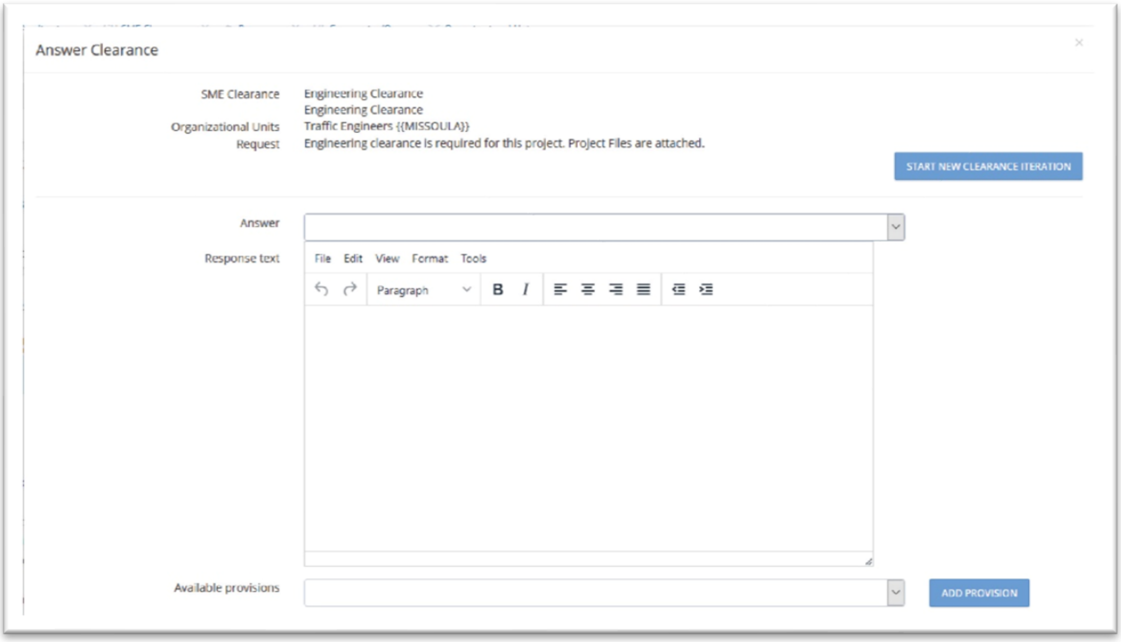
To answer the clearance request, right-click on the red node in the permit tree and select "answer clearance".



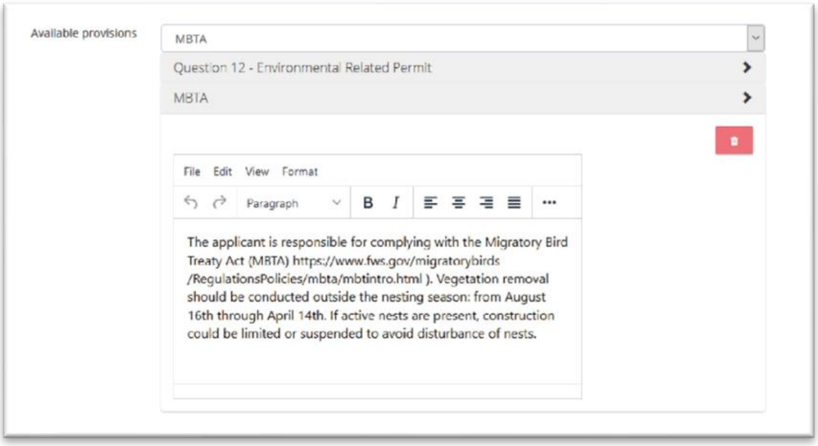
The window displays:

- title and description of the request for clearance.
- "Start New Clearance Iteration" button allows the recipient of the clearance to request clearances to a third party.

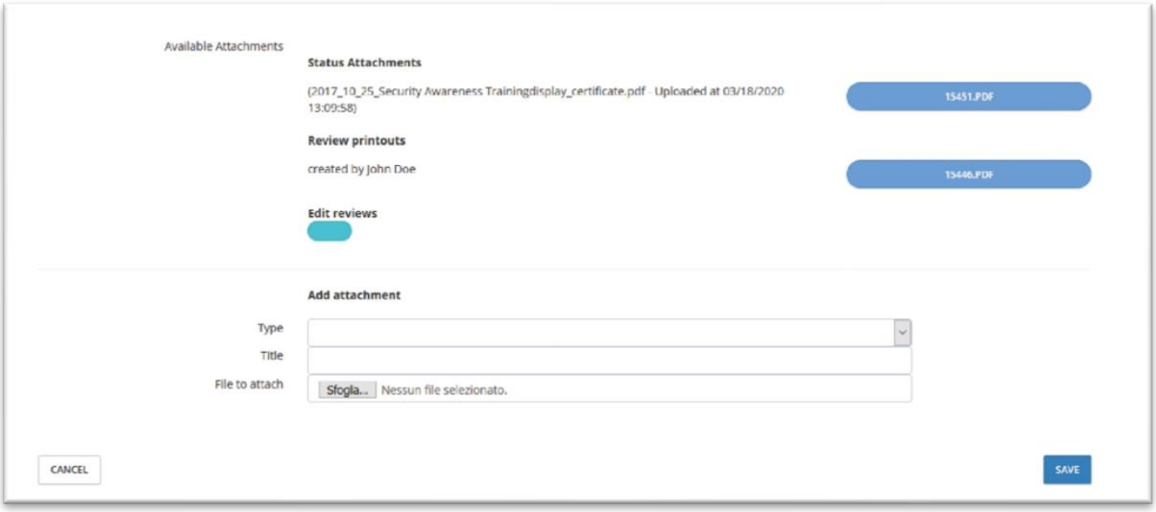
NB: the “Start New Clearance Iteration” function is only available with the web application response method.



- When answering, there is a dropdown for selecting the response, a free text field, and a list of selectable prescriptions with editable standard text. It is possible to select one or more prescriptions from the list.



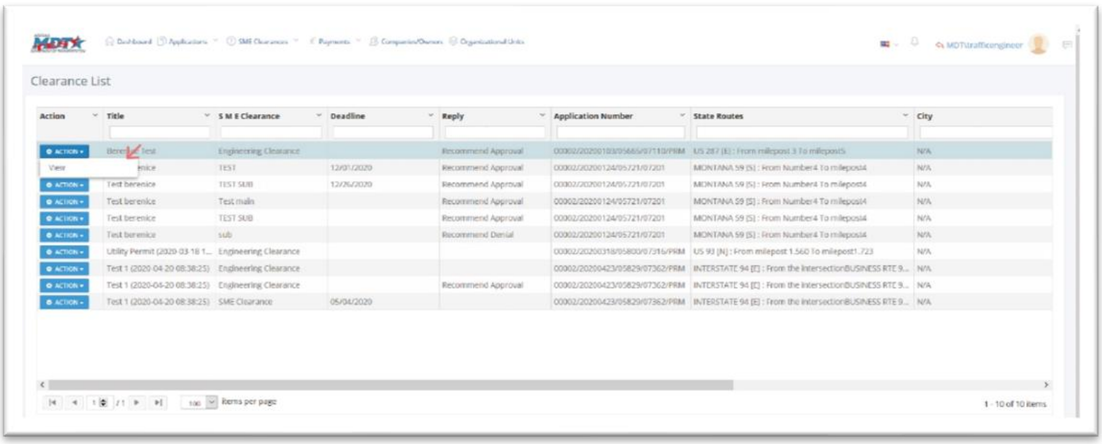
- in the lower portion of the window, it is possible to download and/or upload attachments.



SECTION "ALL MY CLEARANCES"

"All my Clearances" collects all the clearances already answered by the user.

From the table is possible to view the main data. By clicking on the "actions" button, it is possible to view the permit to which the clearance refer.



INSERTION OF CLEARANCES INSIDE THE PERMIT TEMPLATE WORKFLOW

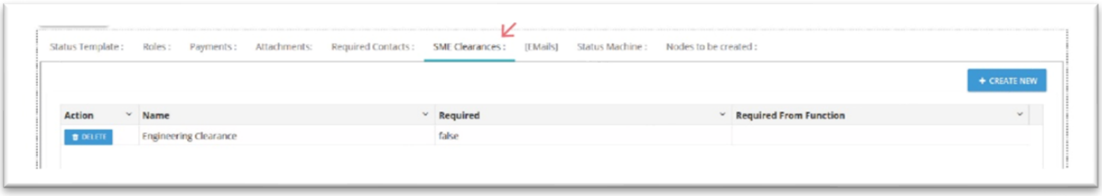
Within the permit workflow, 3 statuses are required for setting clearances:

STATUS 1: Add and send Clearance Request

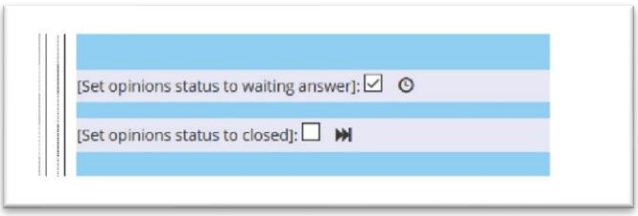
In this status, clearances to be automatically added to the permit tree are selected. To add clearances to the status, right-click on the status name from the permit workflow tree and click "edit".

Click on the "clearance" section.

Click on the button "add" opinion to choose one or more clearances request type.



Activate the check "set opinions status to waiting for an answer" (inside the "exiting the status" tab), which allows defining if clearances requests are opened and sent after exiting the status.

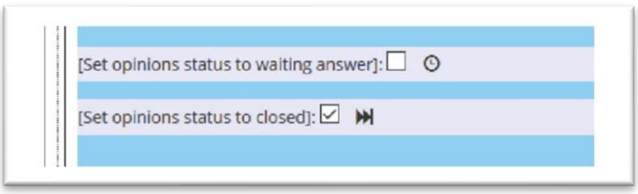


STATUS 2: Pending Clearances Response

In this status, activate the check "Set opinions status to closed" which allows checking the status of the clearance responses, allowing permit status changing when they are in the "closed" status.

This function induces an automatic transition to the next permit status (STATUS 3: Response to opinions Received) when a response to a clearance request has been received.

The permit status change can also be done manually without waiting for the response of all the clearances.



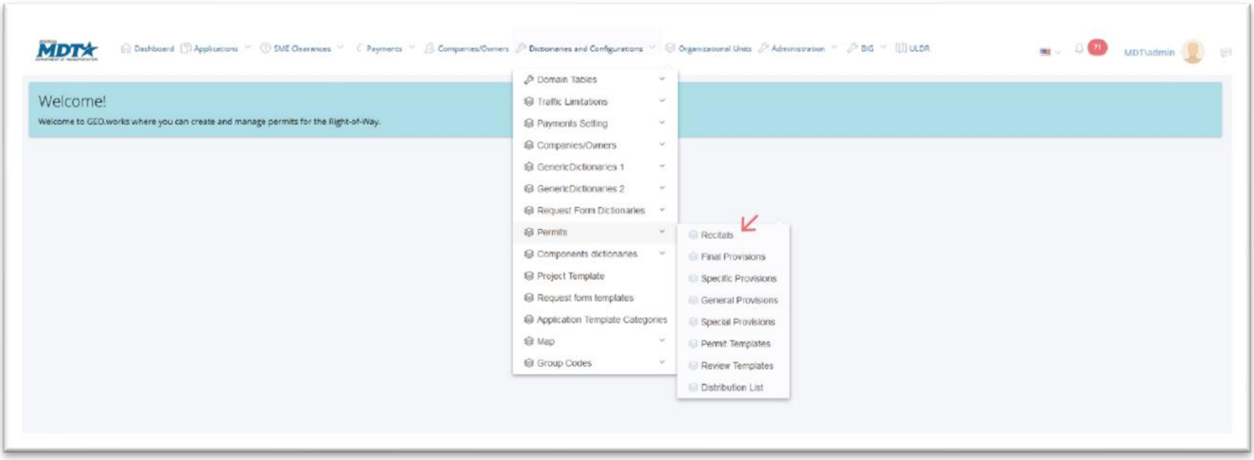
STATUS 3: Response to opinions Received

By distinguishing states 2 and 3, it will be easier to monitor the permit status within permit lists.

SETTING UP DOCUMENT PRINTOUTS

Recitals

Select "Dictionaries and Configurations" from the menu, choose from the "Permits" sub-menu and then “Recitals”. This will display a list of available recitals and an option for creating new recitals.



From this section you can create, modify, or delete recitals, and edit the title and printing order of the recital.

The **ACTION** button next to the existing recital allows the following operations:

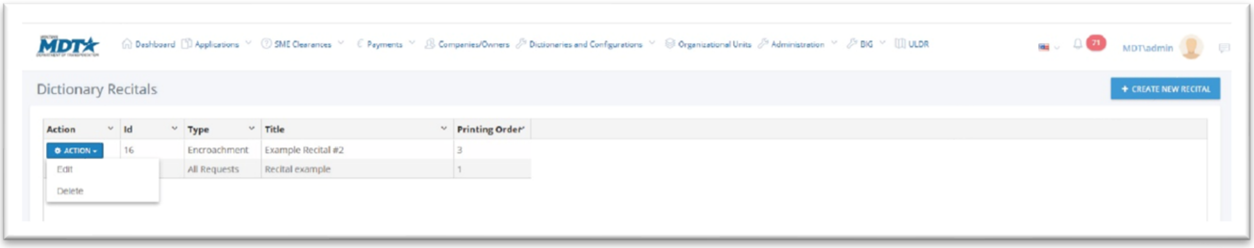
- Edit: edit the recital text and settings
- Delete: allows you to delete the recital

The id column: contains the internal unique identifier of the recital

The type column: indicates the type of permit the recital is to be used for.

The Title column: is the title that describes the recital

The print order column: indicates the order in which the recital will be printed if there are multiple recitals (this can be set later when creating the permit package).



To delete a Recital click **ACTION** next to the Recital you want to delete and select Delete. You will be prompted to confirm the action. Click Yes to delete or Cancel.

To edit a Recital click **ACTION** next to the Recital you want to edit and select Edit. This opens the form where you can manage and edit the recital:

Title: The title that identifies the recital

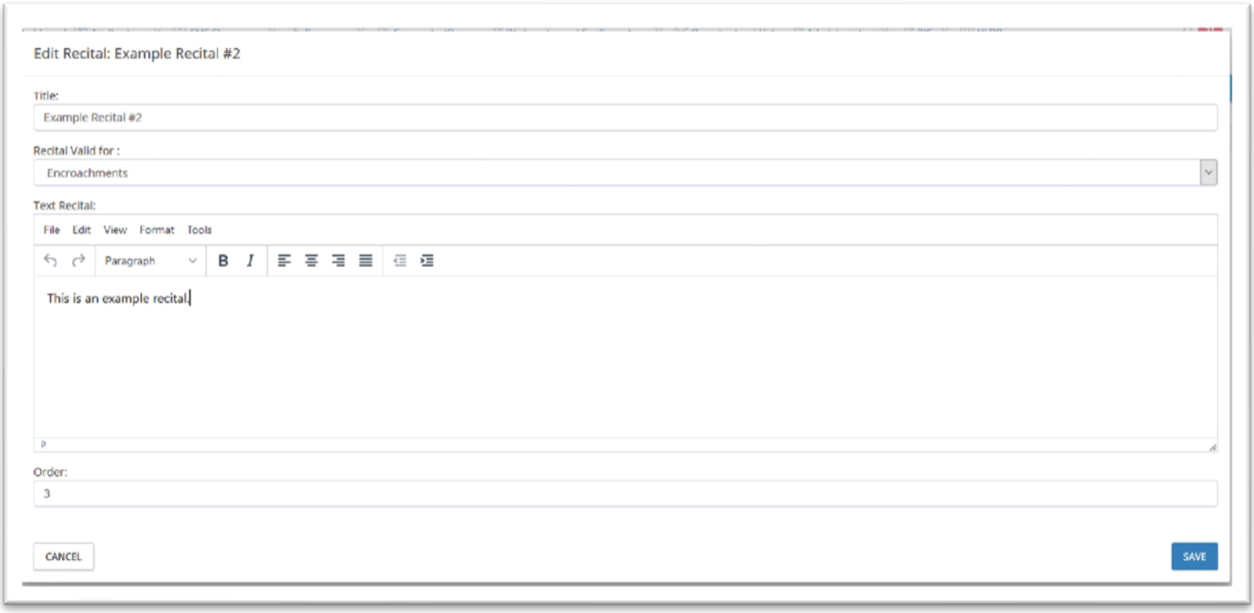
Recital valid for: it indicates the type of permit the recital may be used for. If there are sub-categories of the permit type those would be shown as can be selected individually.

Recital text: used to enter the text of the recital. They system has an editor that allows text formatting (font, bold, italic, color, any paragraphs, etc ..). It is also possible to insert metadata links for the automatic retrieval of the data entered in the permit application. To insert a metadata you have to enter the name of the field created in the XSLT section between braces (eg: {{DATE_PLANNED}}). If for example you needed to include the proposed start and end dates on the application, these data can be retrieved using the XSLT values to retrieve that information.

For more details on metadata and XSLT fields, please refer to the XSLT section below.

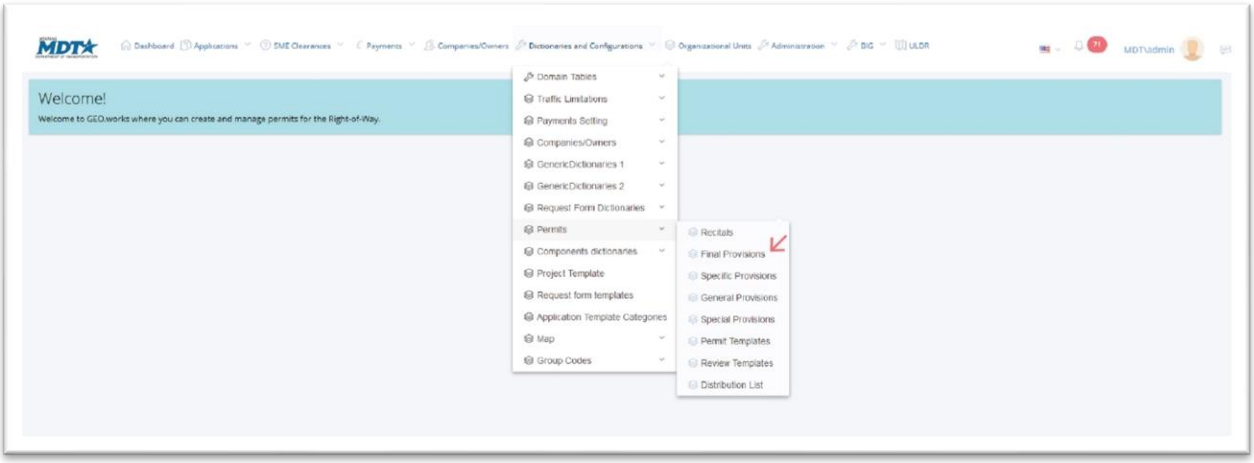
Order: sets the order in which the recital is printed in the permit.

Remember that in this section the standard/baseline recital text is set: within a permit application authorized users can recall the standard/baseline text and then customize as needed.



Final Provisions

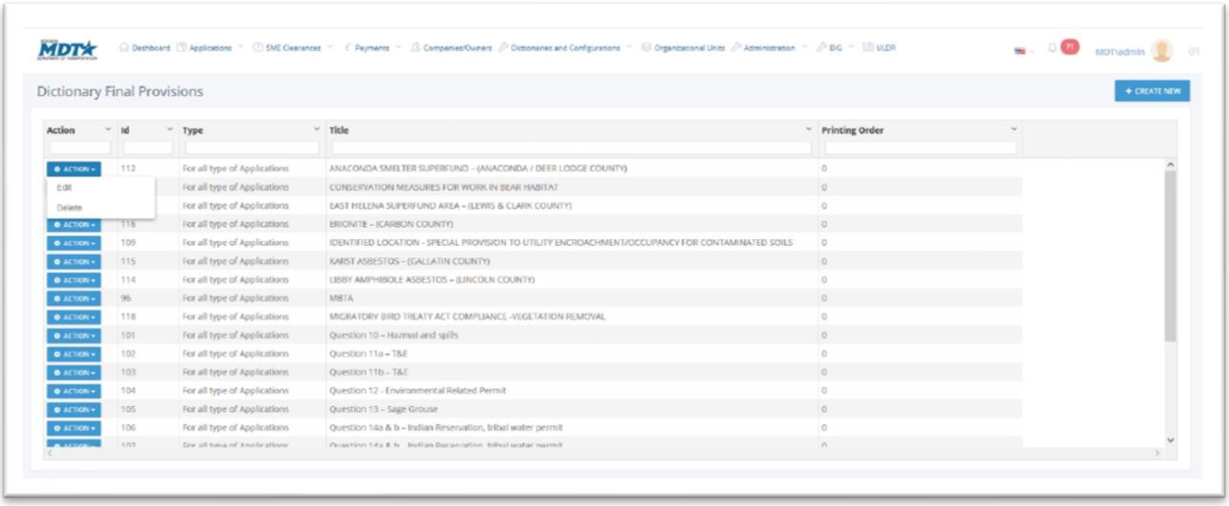
Select "Dictionaries and Configurations" from the menu, choose from the "Permits" sub-menu and then “Provisions”. This will display a list of available provisions and an option for creating new provisions.



From this section you can create, modify or delete provisions, and edit the title and printing order of the provision.

The **ACTION** button next to the existing provision allows the following operations:

- Edit: edit the provision text and settings
- Delete: allows you to delete the provision



The id column: contains the internal unique identifier of the provision

The type column: indicates the type of permit the provision is to be used for.

The Title column: is the title that describes the provision

The print order column: indicates the order in which the provision will be printed if there are multiple provisions (this can be set later when creating the permit package)

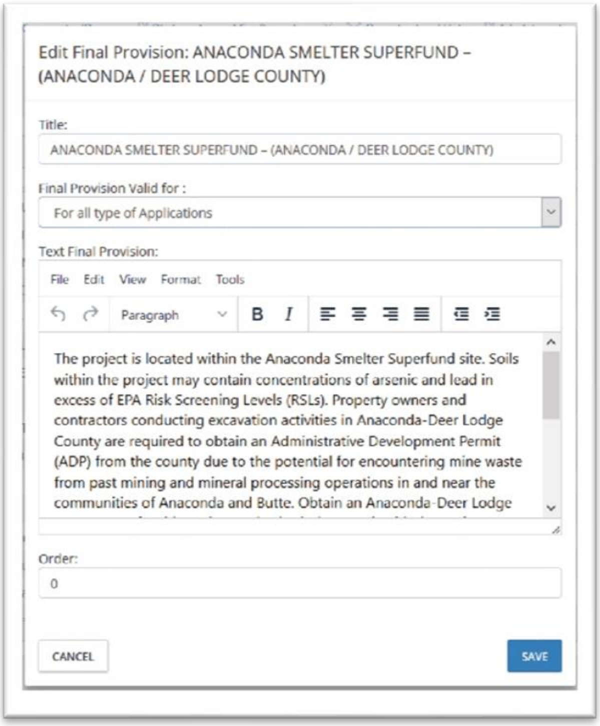
To delete a Provision click **ACTION** next to the Provision you want to delete and select Delete. You will be prompted to confirm the action. Click Yes to delete or Cancel.

To edit a Provision click **ACTION** next to the Provision you want to edit and select Edit. This opens the form where you can manage and edit the provision:

Title: The title that identifies the provision

Provision valid for: it indicates the type of permit the provision may be used for. If there are sub-categories of the permit type those would be shown as can be selected individually.

Provision text: used to enter the text of the provision. They system has an editor that allows text formatting (font, bold, italic, color, any paragraphs, etc ..). It is also possible to insert xslt template key links for the automatic retrieval of the data entered in the permit application. To insert a xslt template key, enter the name of the field created in the XSLT section between braces (eg: {{DATE_PLANNED}}). If for example you needed to include the proposed start and end dates on the application, these data can be retrieved using the XSLT values to retrieve that information.



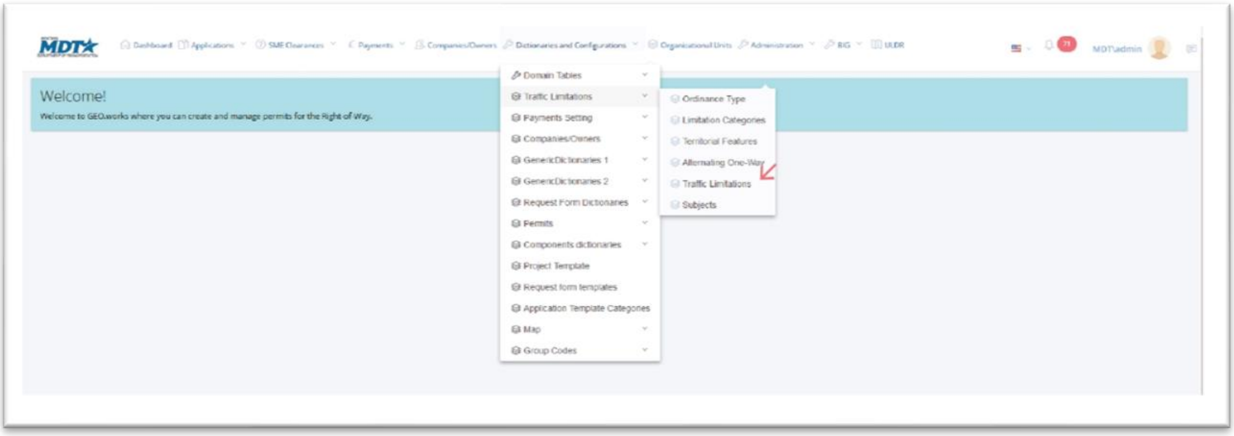
For more details on xslt template keys, please refer to the XSLT section below.

Order: sets the order in which the provision is printed in the permit.

Remember that in this section the standard/baseline provision text is set: within a permit application authorized users can recall the standard/baseline text and then customize as needed.

Traffic restrictions

By selecting the "Dictionaries and Configurations" menu, you can choose the "Traffic Limitations" item in the "Traffic Limitation" sub-menu and you can manage all traffic restrictions.



Once the section is open, there is a list of available traffic restrictions. For each restriction it is possible:

• Modify

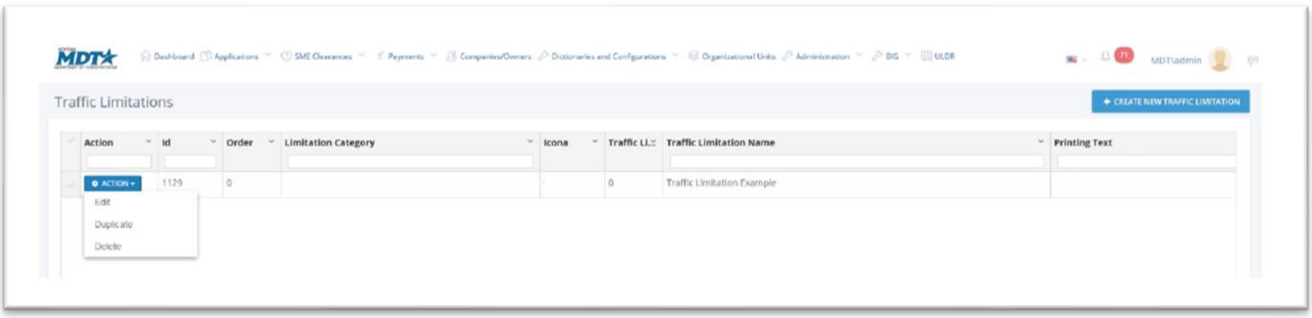
• Duplicate

• Delete

Selecting the edit action opens the edit form where you can set the following attributes:

Icon: here you can upload the image it represents graphically. To do this, press the new icon button and choose the image to upload.

With the delete button the icon you can remove the loaded image.



Signals

In this list it is possible to associate two or signals in order to create a package of measures. The measure package is a utility that allows you to create a set of measures and to insert them into a measure in one go.

Name: is the name that identifies the provision in the list.

Order: is the order in which the provision is printed in the provision

Measure Category:

Contextual help: _ it is possible to load a detailed description of the Measure that will help the operator in choosing the most suitable signal for the measure he is writing.

Only insertable by internal user: selecting this flag indicates that only a user with the active internal role can select it. It is useful if you want outsiders (citizens / companies) to be unable to select some signals when filling out the request

Request Road Side: by selecting this flag when compiling the signal, the user must indicate the side of the road involved.

Alternate One-way Management: selecting this flag in the signal compilation implies the management of an alternate one-way.

Limitation with Measurement: selecting this flag when compiling the signal, the measurement will be inserted.

Requires days of the week: by selecting this flag when compiling the signal, the operator must indicate the days of the week on which the signal is valid

Requires week of the month: by selecting this flag when compiling the signal, the operator must indicate the weeks of the month in which the signal is valid

Holidays: by selecting this flag when compiling the signal it will be valid on holidays

It requires the street numbers: by selecting this flag in the signal compilation the operator will have from which street number to which the signal is valid

Requires FROM HOURS TO HOURS: by selecting this flag when compiling the signal, the user must indicate the time of day when the signal is valid

It provides the following text in the device: selecting this flag opens a form in which you can enter the signal text

Text title: is the title that identifies the description of the signal text

Text: it is the description that is inserted in the text and that will appear in print. You have an editor to write the text

Modifiable Device Text: by selecting this flag the operator during the compilation of the provision can modify the proposed text.

Requires Drop Down: selecting this flag opens a section in which it is possible to prepare a set of choices that the user can make when filling the signal when drafting the measure

Dropdown title: is the title that describes the choice

By pressing the button: Add item to DropDown: you can enter one of the possible choices

Description: a summary of the possible choice is inserted

Text: it is the text of the choice

Order: is the order of the item in the list

Once an item has been saved, it is possible to edit or delete it with the buttons that appear on the line

Visible for: here you indicate for which categories the signal is visible.

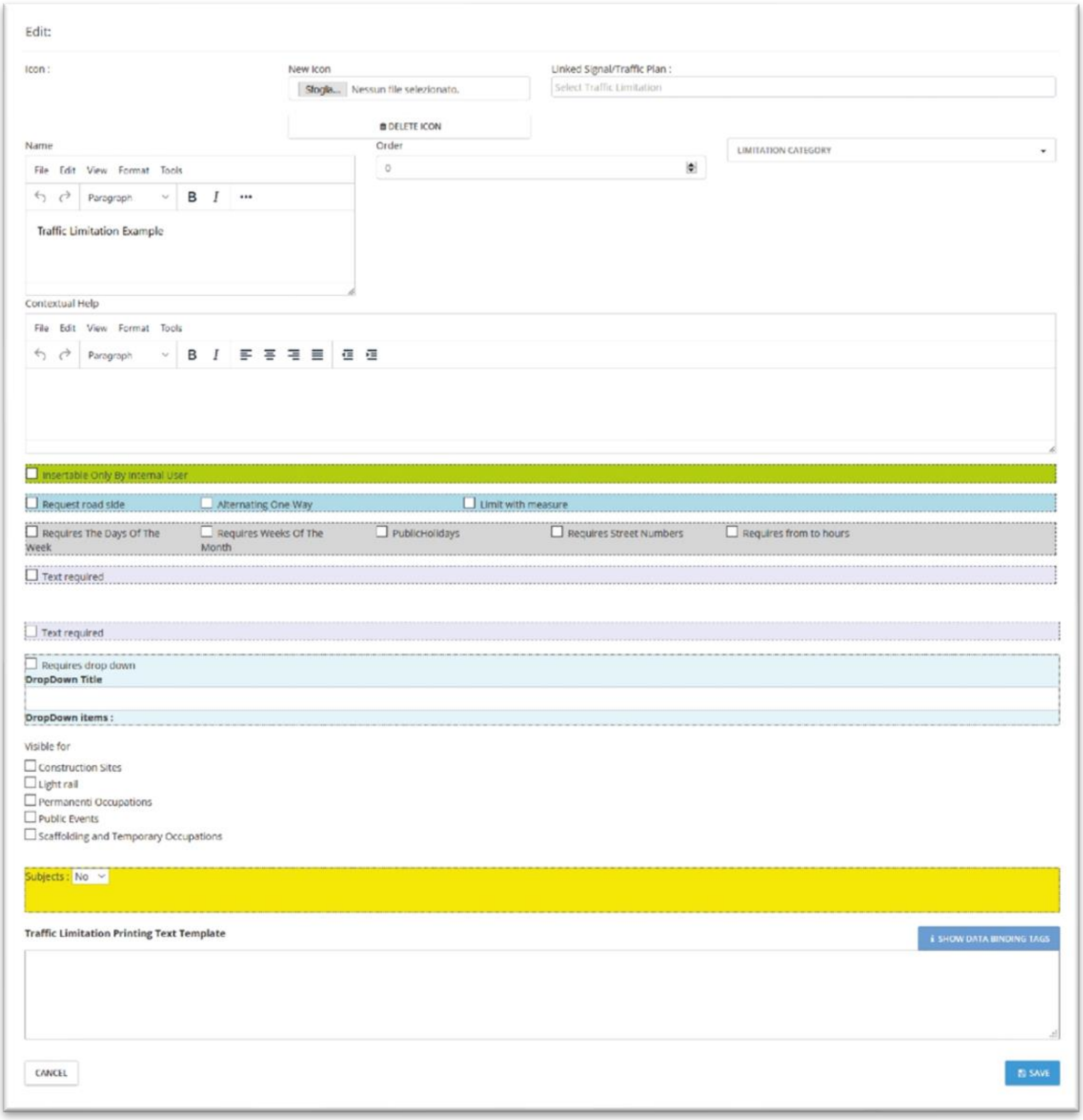
Subjects: by selecting on this flag it is possible to create a list of categories of subjects that are exempted for that signal or otherwise included in the respect.

Order: you can set the order in which they appear in the list

Show tags for data bindings: by pressing this button, the metadata that can be inserted in the section appear:

Print template in ordinance

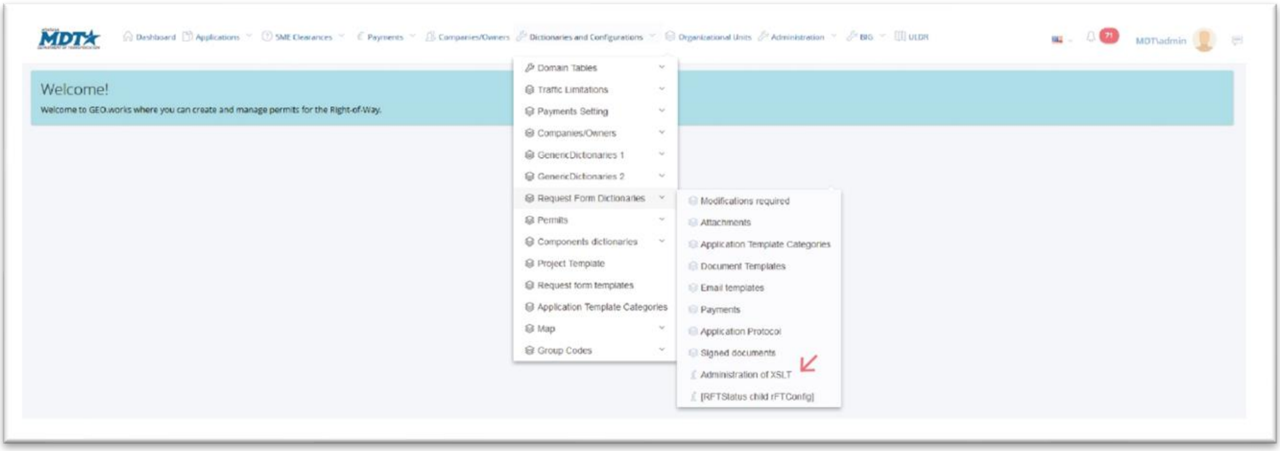
Here you can compose the signal text. In addition to inserting text, it is also possible to insert the metadata indicated in the point above.



XSLT template keys

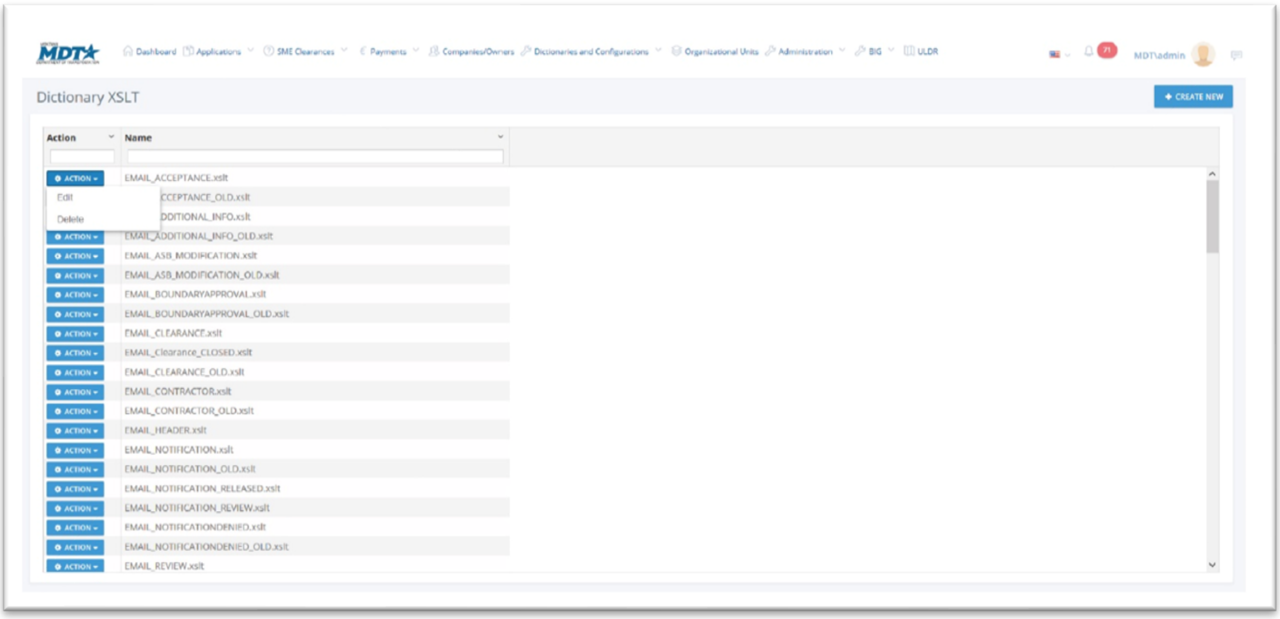
XSLT stands for Exstensible Stylesheet Language Transformation and allows transforming documents into new documents of the same format or to other formats such as PDF, PostScript, PNG.

To edit XSLTs select "Dictionaries and Configurations" menu, you can choose in the "Request Form Dictionaries" sub-menu the "XSLT Administrations" where all the xslt template keys are listed. This item enters one of the most powerful sections of the entire system.



The actions that are available for existing metadata are:

- Edit: edit the xslt template key
- Delete: delete the xslt template key



To create a new form click the “Create New” button at the top right. To edit an existing form, click the action button next to the form and click “Edit”. Once a xslt template key has been selected for edit or a new form is created, the management form opens:

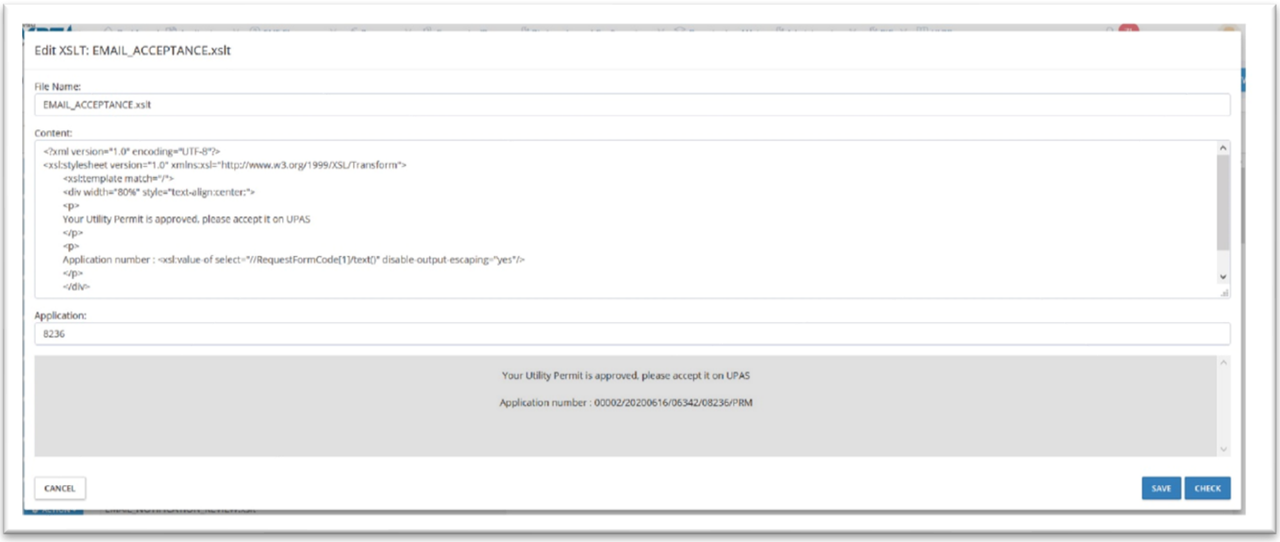
File name: is the name of the xslt template key. This is the name to use to insert the xslt template key in documents (requests, letter, orders, etc) recitals, provisions and traffic regulations.

Content

It is the XSLT construct to be written so that the desired value appears in the document, recital, provision, etc. correctly. To use it some familiarity and experience with HTML and XML is needed.

Once the content has been created or modified you can check or test the results by entering an Application number in the Application filed and then click the CHECK button. The result preview appears in the gray box above the CHECK button.

Once the desired result is obtained, press save and use the xslt template key in the documents you want. Click cancel not to save any changes made.



The delete button allows you to delete a xslt template key.