

EMSE Script Design Document

Version 1.0

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Document Control

Date	Name	Version	Change Reference
12/8/2014	Tom Edwards	1.0	
12/21/2015	Jeanne Chalk	2.0	Modified for BPT in Script Environments

1. Automatically Close a Task, Edit Expiration Date, Schedule an Inspection and Add an Expiration Notice Condition

Summary

Client requested to close a workflow task after the application review has been approved. They would also like to notify the applicant of the approval, schedule the first inspection, set the permit expiration date and add a condition so that all users know there is an expiration date.

Record Types / Entities

Record Types / Entities	<Configuration elements>	<Test Records>
Building/Residential/New/*		

Business Rules

The following business rules criteria must be met in order to successfully implement this EMSE script.

Criteria:

1. On Workflow Task - “Application Acceptance” once the user has set the status of the task to “Accepted – Plan Review Not Req”, a script will do the following steps:

STEP 1 -> Close Task: Close the Permit Issuance task with status of “Issued” and include a comment that the task was automatically closed by a script.

STEP 2 -> Edit ASI: Update the Permit Expiration Date field with a date that is 180 days from the current date.

STEP 3 -> Schedule Inspection: Schedule a Set Backs inspection 30 days out. No inspector should be assigned.

STEP 4 -> Add a Condition: Add a standard condition that informs users that the application requires As Built Plan Submission. This should be a standard condition called “As Built Plans” of type “Building Permit”, and group “Building”. It should be a notice condition. If the standard condition doesn’t currently exist, please create it for testing.

Screenshots

The following screenshots are provided to give additional information about the configuration and expected actions of the EMSE script to be developed.

Screenshot 1: Workflow

Following Workflow is updated

Record ID: BLD15-00003

Menu Submit Assign Reset Calculate Hours Cancel Help

Task Details Sub Tasks (0)

Workflow Tasks

- Application Acceptance
- Plans Distribution
- Building Review
- Electrical Review
- Mechanical Review
- Plumbing Review
- Zoning Review
- Plans Coordination
- Permit Issuance
- Inspection
- Certificate of Occupancy

There currently are no ad hoc tasks defined.

Task Details - Application Acceptance

Status * Accepted - Plan Review Not Re Status Date * 12/21/2015 Hours Spent

Department * Current Department Staff * Current User
Administrator Accela Administrator ☒ Display

Assigned to Department Building Department Assigned to Assigned D 12/21/2015

Comments
[Standard Comment](#)

Screenshot 2: ASI update

The following Custom Field is updated

ZONING

Zoning 1 (Text)

Zoning 3 (Text)

Land Use 2 (Text)

Parking Spaces Required (Number)

Planning Case Required
☐ Yes ☐ No

PERMIT DATES

Application Expiration Date 6/18/2016

Permit Expiration Date 06/18/2016

Zoning 2 (Text)

Land Use 1 (Text)

Land Use 3 (Text)

Parking Spaces Provided (Number)

Required Planning Case Type (Text)

Permit Issued Date

Screenshot 3: Inspection Scheduling

The following Inspection is scheduled

Inspections

Menu
Pending Inspections
Schedule Inspections
Cancel
Help

Selected Records
BLD15-00003
1000 ALLEN ST, PETALUMA, CA 94952

Inspection Group : BLD Residential

Available Inspection Types

Inspection Group	Inspection Type
BLD Residential	Temp Power
BLD Residential	Footings & Forms
BLD Residential	Foundation
BLD Residential	Rough Frame
BLD Residential	Frame
BLD Residential	Floor Deck
BLD Residential	Roof Deck
BLD Residential	Partial/Temp Building Final
BLD Residential	Building Final

Selected Inspection Types

Inspection Group	Inspection Type
BLD Residential	Set Backs

>>
>
<
<<

Pending Inspections
Delete

Screenshot 4: Add a Condition

The following Condition is added

Menu Search Cancel Help					
Go To Summary Record Activities Activity Summary Address Addtl Info Data Fields Data Tables Calendar Comments Flags Requireme					
Group	Type	Condition Name	Comment	Severity	
Building	Building Permit	Stop Work Order	Stop Work applied to open permit due to infractio...	Lock	
Building	Building Permit	Utility Locate	Prior to construction, the Applicant shall contac...	Notice	
Building	Building Permit	As Built Plans	As-Built Plans are required for all construction ...	Notice	
Building	Building Permit	Field Review of Minor Revisions	Minor revisions noted on plans. Items to be corr...	Notice	
Building	Building Permit	Hold CO	Certificate of Occupancy or HOLD due to recorded ...	Hold	