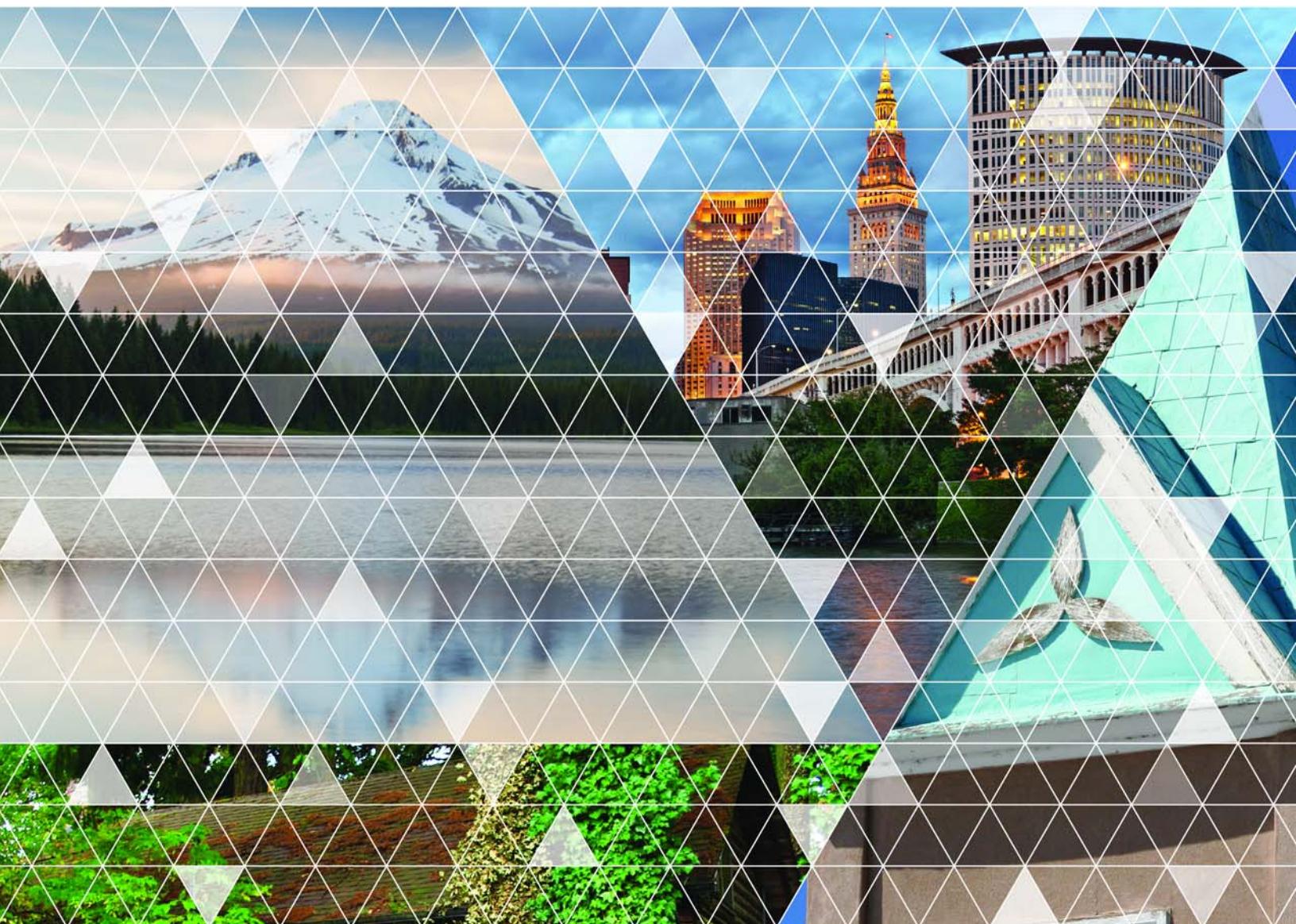


Version 9.0.0

# Accela Citizen Access®

---

## Administrator Guide



## **Accela Citizen Access Administrator Guide**

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March 2017**

### **Corporate Headquarters**

2633 Camino Ramon  
Suite 500  
Bishop Ranch 3  
San Ramon, CA 94583

Tel: (888) 722-2352  
Fax: (925) 659-3201

[www.accela.com](http://www.accela.com)

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# PREFACE

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- [Revision History](#)
- [Obtaining Technical Assistance](#)
- [Disclaimer](#)
- [Related Publications](#)
- [Documentation Feedback](#)

## Overview

Welcome to the *Accela Civic Platform - Citizen Access Administrator Guide*. This guide instructs Accela Services staff and agency system administrators on setting up Citizen Access and Mobile Citizen Access.

The environment and tasks you perform depend on your agency's implementation package and the way your Civic Platform was set up, including access permissions assigned to your user ID. Citizen Access sits on top of the Civic Platform architecture; therefore agencies can easily streamline Civic Platform portlets and expose them to citizens over the Internet.

Citizen Access is a customizable Web-based application that works with Civic Platform applications or databases to provide citizens with on-line access to government services and information. A citizen may apply and pay for permits, schedule inspections, and look up information. Mobile Citizen Access brings the accessibility features of Citizen Access to mobile phones.

Many features in Citizen Access are a reflection of features previously configured or require configuration in Civic Platform, therefore, ensure that your Citizen Access package is on the same version as your Civic Platform or you encounter numerous errors. Use this guide in conjunction with the *Accela Civic Platform Administrator Guide* to enable the features your agency requires.

Mobile Citizen Access provides quick and easy access to information about permits and associated inspections directly from an agency database, any time and anywhere. Mobile Citizen Access is available to all registered Citizen Access users. All that is needed to begin using it is a smart phone that runs operating system software providing a standardized interface and platform for applications, the URL address of the agency website, and a user ID and password. For an overview of how it works with Civic Platform, see [Mobile Citizen Access on](#)

page 19. For details on Accela Mobile Citizen Access, see Appendix E: Mobile Citizen Access on page 593.

## Revision History

**Table 1: Revision History** provides a revision history of this document. This revision history summarizes changes made during each release of this document for the stated version of Civic Platform.

**Table 1: Revision History**

Date	Description
August 2016	Initial version of document for release 8.0.3.

## Obtaining Technical Assistance

As a starting point for all technical assistance, visit the Accela Success Community. At this site you can search the knowledge base to find answers to commonly asked questions about our products and register at the Accela Forum to join in an information exchange with other Accela users.

If you still have questions after visiting Success Community, or if you encounter any problems as you use the product, contact your system administrator. If you determine that you need professional technical assistance, have your agency's designated contact call the Accela Customer Support at (888) 7-ACCELA, ext. 5 or (888) 722-2352 ext. 5. Accela Customer Support is available Monday through Friday from 6:00 AM to 6:00 PM Pacific Daylight/Standard Time.

Before calling, please have this information available for the Customer Support representative:

- The Accela product name and version number
- Steps to replicate the issue, including any error message or error number
- Screenshots, if possible
- Whether the problem is specific to a machine or to a user
- Exactly when the problem began
- Anything that changed on your computer or your network (for example, was new software loaded?)
- A copy of your configuration file, if appropriate

## Disclaimer

Your environment may look and function differently than the environment described in this guide. The feature set, portlet names, toolbar options, and displays described in this guide reflect the default settings that are delivered with most new installations. The settings on your system may be different from these defaults depending on the implementation package for your agency, your user ID, and the way your system administrator sets up your system. Your system administrator can customize several forms, drop-down lists, and field labels throughout Civic Platform.

## Related Publications

The Civic Platform product family provides a set of documents for Civic Platform users and system administrators. It also provides client-hosted sites with a document so they can set up the Accela software application on their own in-house computer system.

*Accela Civic Platform Administrator Guide* -- Instructs agency system administrators on how to set up and manage all the basic features of the Civic Platform application and how to set up functionality that is unique to the Administration portlet in Civic Platform.

*Accela Civic Platform On-Premise Administrator Supplement* -- Provides Accela Services staff and agency system administrators with details on setting up the Civic Platform application server as a client-hosted system.

*Accela Civic Platform User Guide* -- Instructs agency users, inspectors, and clerks on how to use the Land Management application to manage and track the building and inspection processes along with fees and people. It also explains how agency users or clerks can set up and use Asset Management to track, schedule, and maintain assets and work orders.

*Accela Civic Platform Configuration Reference* -- Provides detailed reference data for Standard Choices and Function Identifications (FIDs).

## Documentation Feedback

Accela wants to provide you with the most accurate and useful documentation possible. We welcome your feedback in helping us improve future versions of this guide. Send an email message with your feedback to [documentation@accela.com](mailto:documentation@accela.com). Please include the product name and product version number, whether the feedback involves a printed manual or online help, the topic title, and a description and context of the suggestion.

PART I

# GETTING STARTED

---

- Chapter 1: Introduction
- Chapter 2: Introducing the Architecture and Interface
- Chapter 3: Understanding User Accounts
- Chapter 4: Global Settings Configuration Page
- Chapter 5: Feature Settings Page
- Chapter 6: Registration Settings Page
- Chapter 7: Configuring Notification E-mails
- Chapter 8: Module Settings Configuration Page
- Chapter 9: Page Flow Configuration
- Chapter 10: Working with Web Pages

## CHAPTER 1: INTRODUCTION

### Before You Configure

Planning your Citizen Access set up requires that you decide what functionality your agency wants to provide to the public. For example, you must decide if your agency wants users to be able to search for permits, apply or renew licenses, schedule inspections, or create a service request online. You must also decide if you want to display the application type name as your agency refers to it internally or display it using an alias so the public identify it more easily. For example, if your agency refers to the application using the typical Civic Platform label of Building/Planning/Residential/NA, you may want the public to see the permit simply as New Application. To help you determine how your agency can best use Citizen Access, contact an Accela Services implementation specialist to discuss requirements agency's and software solutions.

Use this guide in conjunction with the *Accela Civic Platform User Guide*, *Accela Civic Platform Administrator Guide* and *Accela Civic Platform Configuration Reference* to ensure a successful implementation.

#### This guide contains the following parts:

1. [Part I Getting Started](#) introduces users to Citizen Access and provides information about the architecture, interface, configuration pages, and audience. The chapters include:
  - [Chapter 2: Introducing the Architecture and Interface](#) provides an overview of the software architecture, including how Citizen Access interacts with Civic Platform. This chapter also introduces basic page elements, such as the navigation panel, configuration pages, Web pages, buttons, and icons.
  - [Chapter 3: Understanding User Accounts](#) explains account management information, user account types, and supporting configurations.
  - [Chapter 4: Global Settings Configuration Page](#) explains configurations within sections of the Global Settings page, including global search features, shopping cart, GIS functionality, and report controls.
  - [Chapter 5: Feature Settings Page](#) explains configurations within sections of the Feature Settings page including, enabling modules, forced registration login, link display, and search functionality.
  - [Chapter 6: Registration Settings Page](#) explains configurations within sections of the Registration Settings page including, expiration interval, license registration features, and activation e-mail customization.

- [Chapter 7: Configuring Notification E-mails](#) explains the various configurations associated with sending e-mails to public users for processes such as registration, forgotten passwords, account activation, license verification and renewal.
  - [Chapter 8: Module Settings Configuration Page](#) explains configurations within sections of the Module Settings page including inspection scheduling, education/examination functionality, and map settings.
  - [Chapter 9: Page Flow Configuration](#) explains how to create the user experience through designing page flows for a module.
  - [Chapter 10: Working with Web Pages](#) explains how to customize and configure Web pages including, customizing text, controlling field display, and field configurations.
2. [Part II Managing Implementation](#) introduces users to the various ways an agency can implement and maintain the Citizen Access environment for their agency. This part provides information and supportive configuration tasks for the Citizen Access administration site and refers to configurations in Civic Platform. The chapters include:
- [Chapter 11: Implementation Planning](#) explains the available features and functionality your agency can offer the public through Citizen Access, such as tasks related to implementing registration and questions to prepare the agency for implementing record query and inspections.
  - [Chapter 12: Defining the Registration and Account Management Process](#) explains the decisions, tasks, and configurations to implement the registration process, including customizing activation e-mails and requiring a license at registration.
  - [Chapter 13: Configuring Record Inquiry](#) explains the decisions, tasks, and configurations to implement record inquiry, such as global search, cross module search, search for a licensee, and search filter configurations.
  - [Chapter 14: Creating Records](#) explains the decisions, tasks, and configurations to implement and support the ability to create records online, including how to create and enable record types for ACA, display links, and configure document attachment functionality.
  - [Chapter 15: Fees and Online Payments](#) explains the decisions, tasks, and configurations for online fees and online payment processing, including fee estimation and shopping cart.
  - [Chapter 16: Managing Inspections](#) explains the decisions, tasks, and configurations to implement inspections and inspection scheduling online, including optional inspections, pending inspections, and multiple inspection scheduling.
  - [Chapter 17: Authorized Service](#) explains configuration information for you to complete the implementation of authorized service throughout the various areas of Civic Platform and ACA Admin.
  - [Chapter 18: License Verification and Online Renewal](#) explains the decisions, tasks, and configurations to implement licenses, license verification, and online renewals, including scripts, customizing validation e-mails, and setting expired license and insurance functionality.
  - [Chapter 19: Certifications and Education](#) explains the tasks and configurations to implement education, continuing education, and examination functionality, including Web page customization, component information, customization of e-mails, and scripts.

- [Chapter 20: Reporting Information](#) explains the decisions, tasks, and configurations supporting reports functionality in Citizen Access including Report Manager configurations, parameters, and standard reports.
  - [Chapter 21: Maintaining the ACA Website](#) a chapter explaining features that assist in maintaining the Citizen Access website, including partial application purge and expired interval settings.
3. [Part III Appendices](#) offers additional reference information that can assist in configuring and implementing Citizen Access. The appendices include:
- [Appendix A: Accela Engineering Event Scripts](#), an appendix that lists the available scripts associated with elements in Citizen Access and Civic Platform.
  - [Appendix B: Features Requiring Interface Implementations](#), an appendix that lists the features which require interface implementation.
  - [Appendix C: Variations for Creating Records](#), an appendix that provides alternative methodology for creating records in Citizen Access, such as amendment functionality and multiple agency services.
  - [Appendix D: LDAP Authentication and SSO](#), an appendix that provides instructions on how to enable LDAP authentication and how to enable SSO support with Oracle Access Manager.
  - [Appendix E: Mobile Citizen Access](#), an appendix that lists and explains the Citizen Access features that extend to mobile functionality in AMCA. It provides administration configuration and user access information.

## CHAPTER 2:

# INTRODUCING THE ARCHITECTURE AND INTERFACE

---

Citizen Access allows agencies to interact with their public users in a more meaningful way by providing online access to government services and information. Mobile Citizen Access brings the accessibility features of Citizen Access to mobile phones. This chapter introduces you to Citizen Access and Mobile Citizen Access. It covers highlights of the architecture and provides a complete overview of the Citizen Access administrative user interface. It includes information on the navigation area, buttons and icons, configuration settings, and the Web page designer with its associated Web page tasks.

The Citizen Access administrative tool, known as **ACA Admin**, serves to configure and design your ACA website. Use this tool to enable modules and their associated features, including the design of page flows for record types for the module. You can modify text on a Web page, display or hide fields, customize drop-down lists, limit search functionality, define permissions to information, and customize the content of e-mails that relate to Citizen Access tasks. You can also use this tool to define the features available to Mobile Citizen Access users.

The term “CAP” is legacy terminology, and is replaced by “record” throughout Civic Platform and Citizen Access. The term Record defines a broader range of items or forms that users manage within Civic Platform, such as application, case, license, permit, service request, and work order.

- [Architecture Overview](#)
- [Payment Processing and Trust Accounts](#)
- [Mobile Citizen Access](#)
- [Accessing the Citizen Access Administration Tool](#)
- [Understanding the User Interface](#)
- [Using the Navigation Panel](#)
- [Reviewing Buttons and Icons](#)
- [Introducing General Panel Configuration](#)
- [Introducing Module Tab Configurations](#)

## Architecture Overview

Citizen Access is built on the Civic Platform architecture, which integrates enterprise information resources and lets users access this information from any perspective. By providing a common framework, standardized interfaces, and an open architecture, Civic Platform provides the infrastructure that offers agencies a complete 360 view of their total government

enterprise. Additionally, Civic Platform provides a comprehensive self-service function that easily integrates with the jurisdiction website or existing e-government portal.

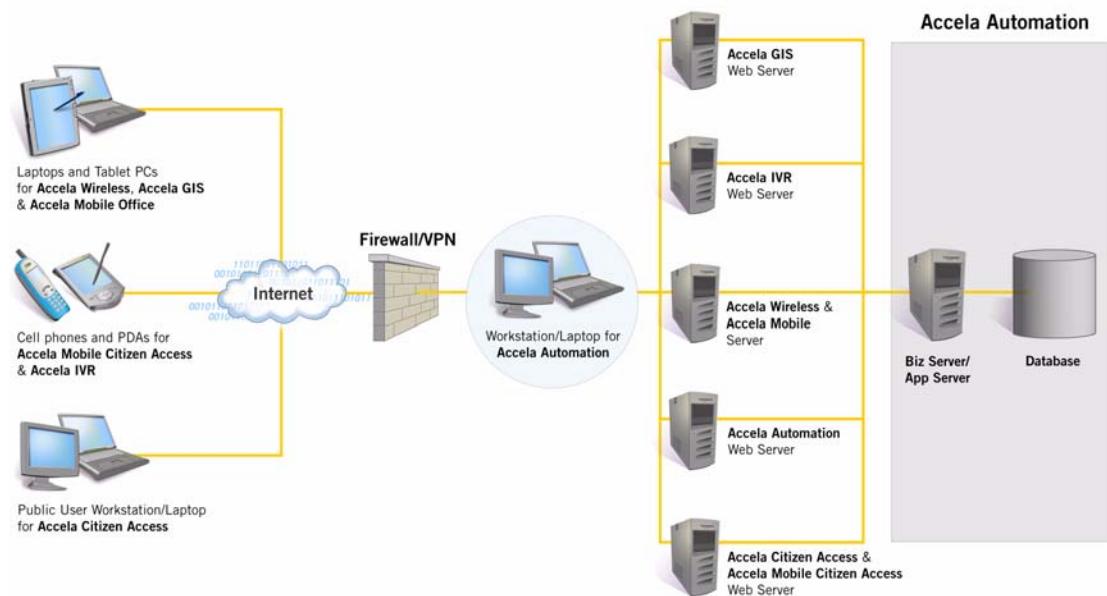
This architecture provides direct access to government citizens – public users can access real-time information with this model. Whether the public users want to file a complaint or check on the status of a permit or license, public users can use Citizen Access, which is an add-on to Civic Platform, to get up-to-date information.

- [Civic Platform Architecture](#)
- [Accela Add-on Architecture](#)

## Civic Platform Architecture

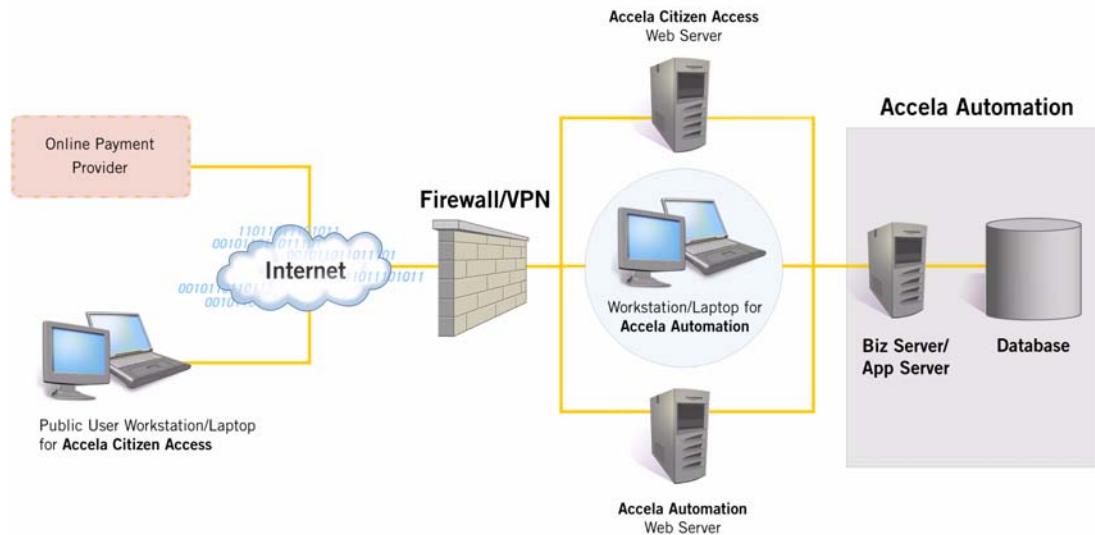
Civic Platform enables Accela software modules to integrate enterprise information resources and features a powerful set of tools that allow users to enhance the way they interact with agency data. Following is an illustration of the deployment of Civic Platform.

**Figure 1: Civic Platform Enterprise Deployment**



## Accela Add-on Architecture

Citizen Access and Mobile Citizen Access integrate with agency data as illustrated below.

**Figure 2: Citizen Access Deployment**

## Payment Processing and Trust Accounts

You need to configure Civic Platform for in-house and online payment processing. This configuration allows for payment intake at your agency's place of business. In addition, your agency can accept payments online in the form of credit cards and electronic funds transfers. See [Fees and Online Payments](#) for instructions.

Payment processing may require configuring an ePayment adapter, such as the ones provided for use with Accela CivicPay, PayPal, and other popular services. The Accela Delivery Team is available to configure the ePayment adapter for you, or you can use a do-it-yourself approach. To get started with the do-it-yourself approach, download the *ePayments SDK Development Guide* and the *ePay SDK.zip* file from Success Community. The *ePay SDK.zip* file includes all of the scripts and web services needed for configuring an ePayment adapter.

You can also set up trust account functionality in Citizen Access. Registered public users can review and download a statement of one or multiple trust account balances and transaction histories for a record. Make deposits to and withdrawals from the associated trust accounts. Make payments from the trust account associated with the parent record.

To set up the trust account functionality for public users in Citizen Access, administrators must perform configurations in both Civic Platform and in Citizen Access. For a summary of the setup steps, see [Trust Accounts](#). This section provides references to the Civic Platform documentation, including the required Function Identification numbers that enable specific Trust Account operations. It also highlights the setup steps within the Trust Account and Account Management pages in Accela Citizen Setup.

## Mobile Citizen Access

Mobile Citizen Access provides mobile phones with quick and easy access to information about permits and associated inspections directly from an agency database.

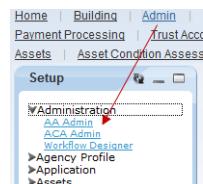
Mobile Citizen Access is available to all registered Citizen Access users. All that is needed to begin using it is a smart phone that runs operating system software providing a standardized interface and platform for applications, the URL address of the agency website, and a user ID and password. This guide provides details on how to use the **ACA Admin** to configure and set up features so they function in Mobile Citizen Access. For AMCA configuration steps, see [Appendix E: Mobile Citizen Access on page 593](#).

## Accessing the Citizen Access Administration Tool

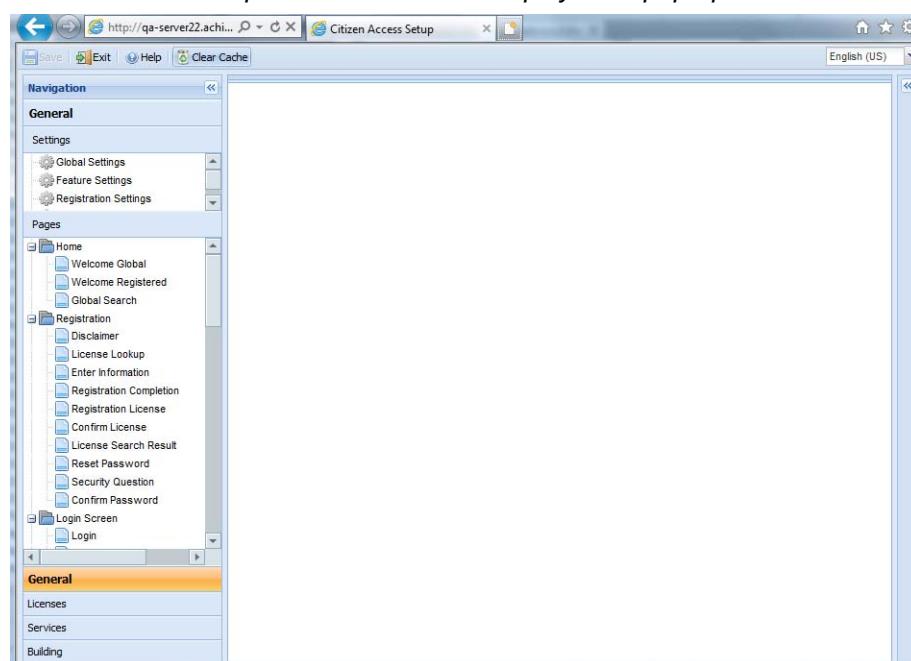
3. Navigate to **Civic Platform > V360 Administration**.

*Civic Platform displays the Setup administration portlet.*

4. In the **Setup** portlet, click the **Administration** item and choose **ACA Admin**.



*Citizen Access Setup administrative tool displays in a pop-up window.*



## Understanding the User Interface

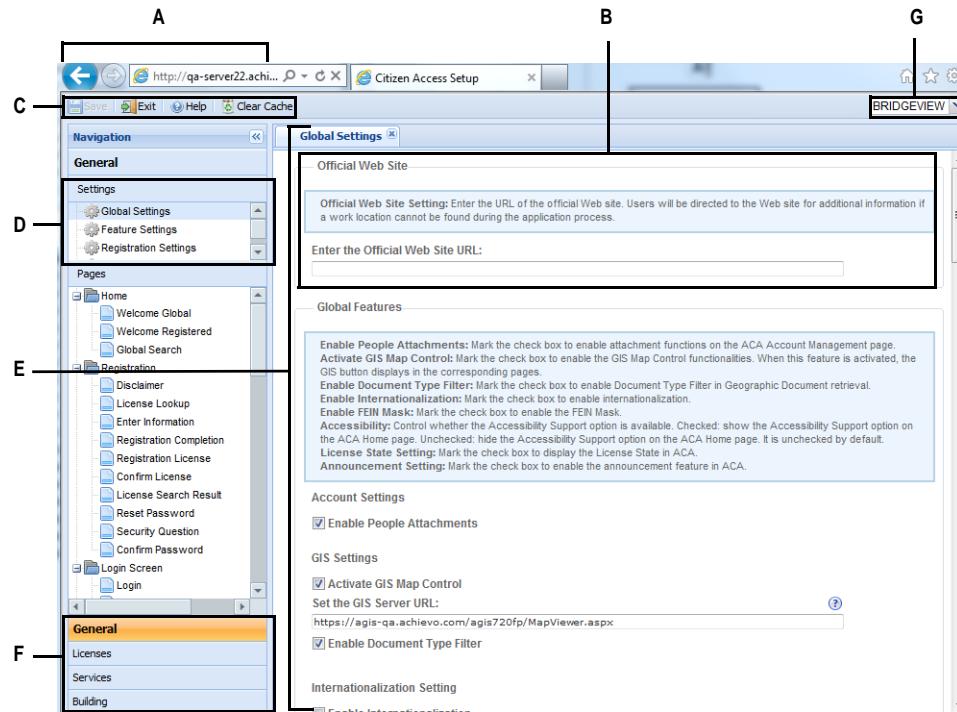
As you work with the Citizen Access administrative tool, you see that it provides two main user interfaces. Use the settings interface to configure the entire ACA site and the associated modules enabled for use. Use the designer user interface to design and customize functionality on a Web page. Both interfaces look similar. The two user interfaces both have a navigation panel and a work area. The main difference between interfaces is that the designer interface has a properties panel on the right side of the work area that provides customizations and configurations specific to the Web page in which you are working.

- [Viewing the Settings Interface](#)
- [Viewing the Designer Interface](#)

## Viewing the Settings Interface

The settings user interface provides a work area dedicated to configure the ACA website, features, registration options, and modules. When working with a settings interface, you view a page with two distinct panels, a navigation panel on the left side and a large workspace on the right side. See [Figure 3: Settings User Interface](#). The ACA Admin tool provides a settings interface for the following options: Global Settings, Feature Settings, Registration Settings, and Modular Settings. These areas are in the top portion of the navigation area under the Settings block. For more information about the navigation area, read [Using the Navigation Panel](#).

Figure 3: Settings User Interface



- A Navigation Panel. Use the left side of the page to navigate to the various areas of configuration, including Web pages so you can customize and design your Citizen Access website.
- B Configuration Box. A settings page displays numerous configurations organized by theme in a light inactive box.
- C Save, Exit, Help, and Clear Cache buttons. Use the buttons to save your changes, exit the ACA Admin, access Help content, or clear cache data manually.
- D Settings Area. Use this area to select the settings page associated with the configurations you want to define.
- E Workspace. The center panel provides the interactive work space. Once you choose a settings page or Web page, it displays in this section for configuration and customization.
- F Module Tab. Any module enabled for ACA has an associated configuration tab to hold the modular specific configurations and Web pages. Click the module configuration tab to access and configure modular settings, create Page Flows for Record types, or customize modular Web pages.
- G Agency Drop-down List. This drop-down list displays only when your agency acts as super agency by implementing the multiple agency services management features. Super agency administrator can switch among the super agency's and the sub-agencies' Citizen Access Setup sites. For detailed information on multi-agency services management, see [Creating Records for Multiple Agencies on page 532](#).

## Viewing the Designer Interface

The designer interface has a left navigation panel and a right properties panel that expands or collapses anytime, which is particularly useful when you need to maximize the size of the center workspace. Use the left panel to navigate within the ACA Admin and select Web page(s) for

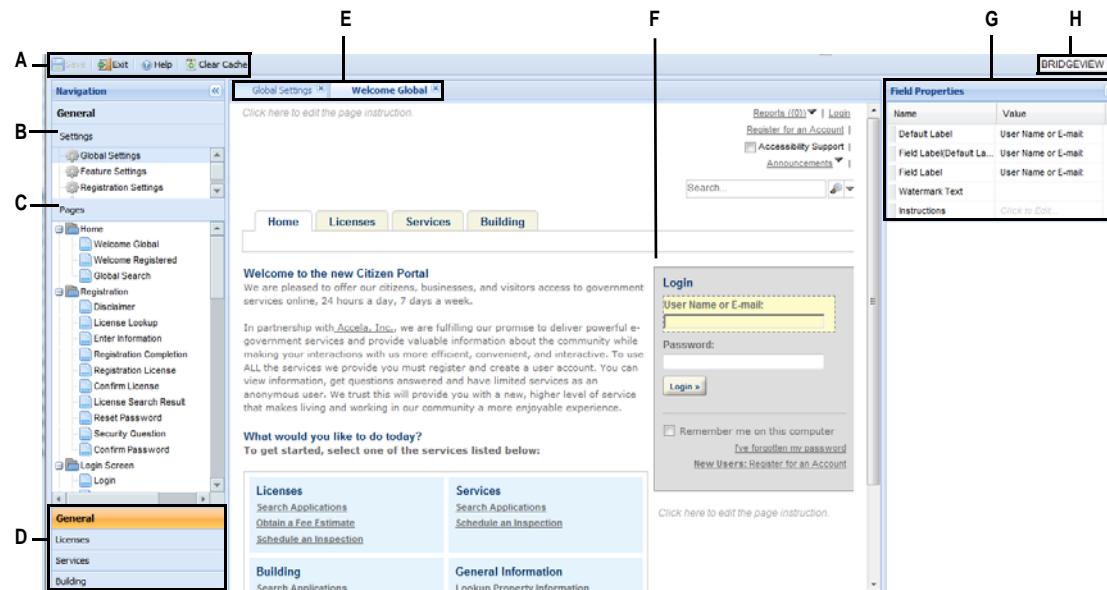
customization. For an illustration of the user interface, refer to [Figure 4: Web Page Designer User Interface on page 22](#).

The center panel provides the interactive work space for where you can view the customized Web page content. The administrative tool allows you to work on multiple Web pages at a time. The center work area displays tabs corresponding to each opened Web page near the top of the screen. Move from one open web page to another by clicking on the corresponding tab. If you modify a Web page, an asterisk displays next to a tab heading to indicate the page is modified, but not saved. Make sure you save each page separately.

The right panel provides a list of properties or customization options that are specific to the Web page displayed in the center workspace.

To save any edits made on Web pages, click the Save button located in the upper left hand corner. To close the ACA Admin application, click the Exit button.

**Figure 4: Web Page Designer User Interface**



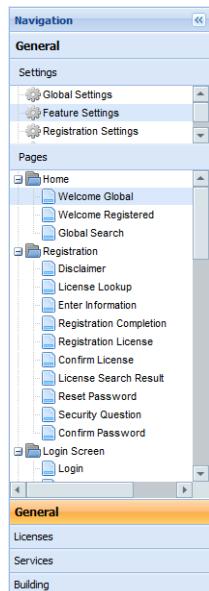
- A** Save, Exit, Help, and Clear Cache. Use the buttons to save your changes, exit the ACA Admin access Help content, or clear cache data manually.
- B** Navigation Panel. Use the left panel to configure settings, navigate within the ACA Admin, and select Web page(s) for customization.
- C** Pages. ACA Admin displays Web pages in a tree view for easy selection. Any page selected from the tree displays in the center work area.
- D** Configuration tabs. All modules enabled on the Feature Settings page have an associated configuration tab. Click the module configuration tab to access and configure modular settings, create Page Flows for Record types, or customize modular Web pages.

- E** Page tabs. Any Web page or configuration page you open from the left panel displays in the center work area. You can have multiple pages open at a time. Move from one page to another by clicking on the page tab associated with the page you want to work with. Click Save to save changes and exit the page by clicking the x in the top right corner of the tab.
- F** Center Panel. The center panel provides the interactive work space for configuring login settings and customizing Web pages.
- G** Right Panel. The right panel provides a list of properties or customization options directly related to the Web page displayed in the center workspace.
- H** Agency Drop-down List. This drop-down list displays only when your agency acts as super agency by implementing the multiple agency services management features. Super agency administrator can switch among the super agency's and the sub-agencies' Citizen Access Setup sites. For detailed information on multi-agency services management, see [Creating Records for Multiple Agencies on page 532](#).

## Using the Navigation Panel

The navigation panel locates on the left side of the page. It directs you to various modules enabled for ACA, the Settings pages, and individual Web pages. See [Figure 5: Navigation Panel](#).

**Figure 5: Navigation Panel**



## Reviewing Buttons and Icons

This section introduces you to the buttons and icons displayed in Citizen Access Setup. Refer to [List 1: Buttons and Icons](#) for a graphical representation and brief description for each icon and button of page element.

**List 1: Buttons and Icons**

	Asterisk. This icon displays on a page tab in the center panel once a Settings or Designer page is modified. This symbol serves as a notification to the public user that changes are made and to click the Save button to retain them.
	Clear Cache. Use the Clear Cache button to clear cache data manually when you want the administrative edits in Citizen Access Setup to immediately take effect on Citizen Access.  <b>Note:</b> Access Citizen Access <i>clears cache data automatically every two minutes</i> .
	Close. This button displays on the right side of a page tab in the center panel. Click to close the page.
	Exit. Click the Exit button to sign out of Citizen Access.
	Expand/Collapse buttons. Click the chevron button to expand or collapse the navigation left panel or properties right panel.
	Help. Click the help button to open the <i>Citizen Access Administrator Guide</i> .
	Navigation Tree icons. Click the plus sign to expand or the minus sign to collapse a tree view. These icons appear on the Feature Settings page. You can see the icons in the Pages area to expand Web Page folders to view the associated Web pages.
	Page Flow Configuration icon. This icon represents the page flow configuration page, access it to define what information is available on Web pages during an intake process. It uses building blocks to create a unique flow of information customized for and assigned to a record type to create the user experience.
	Save. Click the Save button to retain modifications to a configuration settings page or designer Web page.
	Setting Icon. This icon identifies the Setting pages in the software.

**List 1: Buttons and Icons (Continued)**

	Web Page Folder Icon. This icon identifies a Web page folder. Expand the folder to view the Web pages requiring customization.
	Web Page Icon. This icon identifies a Web page in Citizen Access. You must customize the content and settings for each Web page to reflect the message and features your agency wants to provide to public users.

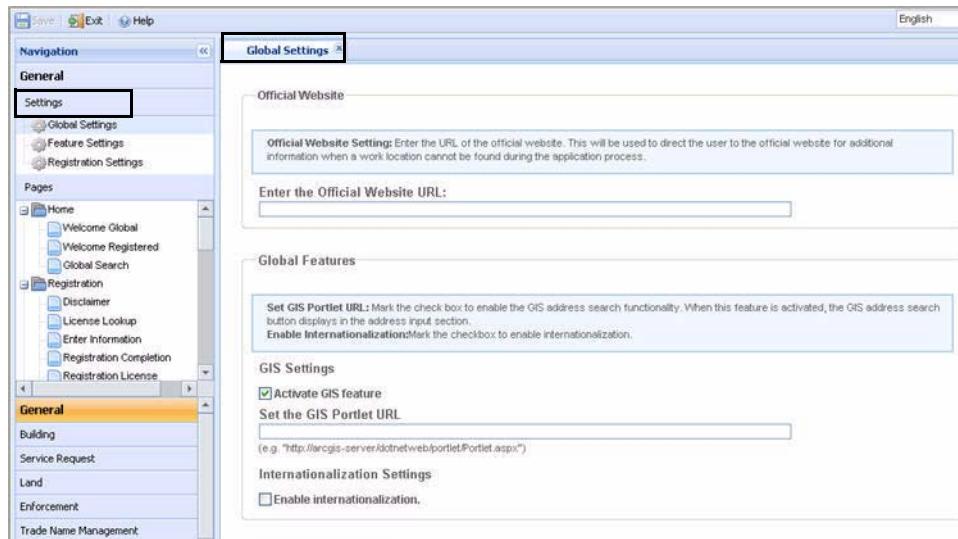
## Introducing General Panel Configuration

The General tab in the navigation panel houses the Global Settings page, the Feature Setting page, Registration Settings page, and Email Setting page. It also contains the welcome Web pages and additional general Web pages applicable to all modules, such as registration page or general search page.

- [Viewing the Global Settings Page](#)
- [Viewing the Feature Settings Page](#)
- [Viewing the Registration Settings Page](#)
- [Viewing the General Pages Area](#)

### Viewing the Global Settings Page

The Global Setting page provides the possibility to define the official website and other Global features for your website including: GIS, Global Search, Report Access and Display Configurations, Internationalization, Fees, Online Payment Processing, and Shopping Cart. You can view the Global Settings page by clicking Global Settings from the Settings area of the General navigation panel. See [Figure 6: Global Settings Page](#). For an overview of the configurations available on the Global Settings page, see [Chapter 4: Global Settings Configuration Page](#).

**Figure 6: Global Settings Page**

### To view the Global Settings page

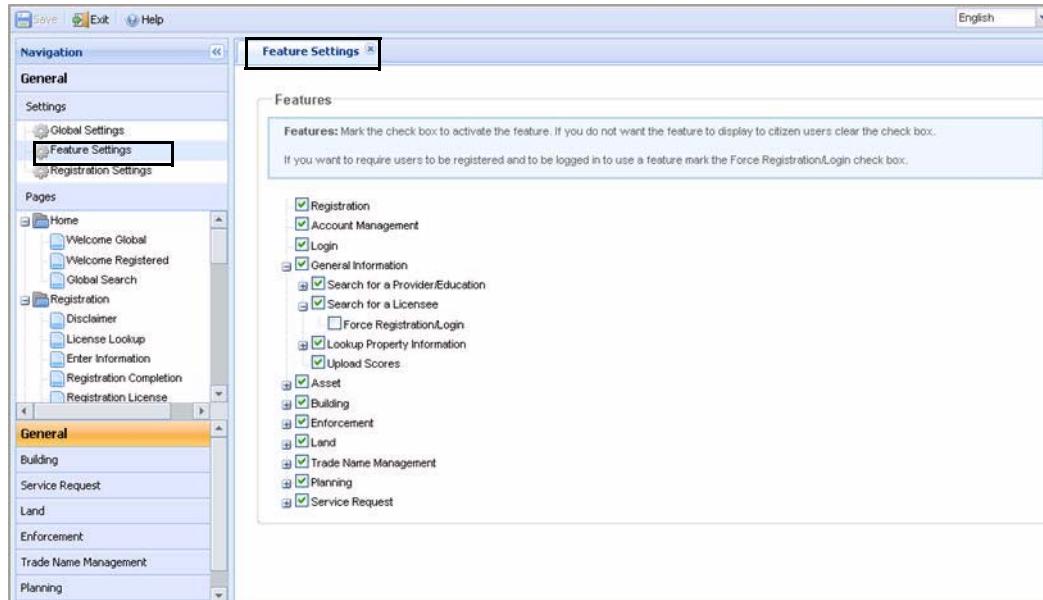
1. Navigate to Citizen Access Setup. For instructions see [Accessing the Citizen Access Administration Tool](#).
2. Verify **General** is active in the navigation panel.
3. Locate the **Settings** area and click **Global Settings**.

*Citizen Access Setup displays the Global Settings page in the center panel.*

## Viewing the Feature Settings Page

The Feature Settings page is used to enable modules, display hyperlinks, enable features, and define login requirements for your ACA website. The page is identified by a column of check boxes of features, modules, and links. Additional check boxes display when a module is expanded in the tree view. See [Figure 7: Feature Settings Configuration Page](#).

When you enable a module on the feature settings page, Citizen Access creates a tab for the module on the Home page and a module tab in the navigation panel. When you click the module tab in the navigation panel, Citizen Access activates the module settings page and associated module Web pages for customization. For more information about the configurations associated with the Feature Settings page, refer to [Chapter 5: Feature Settings Page on page 82](#).

**Figure 7: Feature Settings Configuration Page**

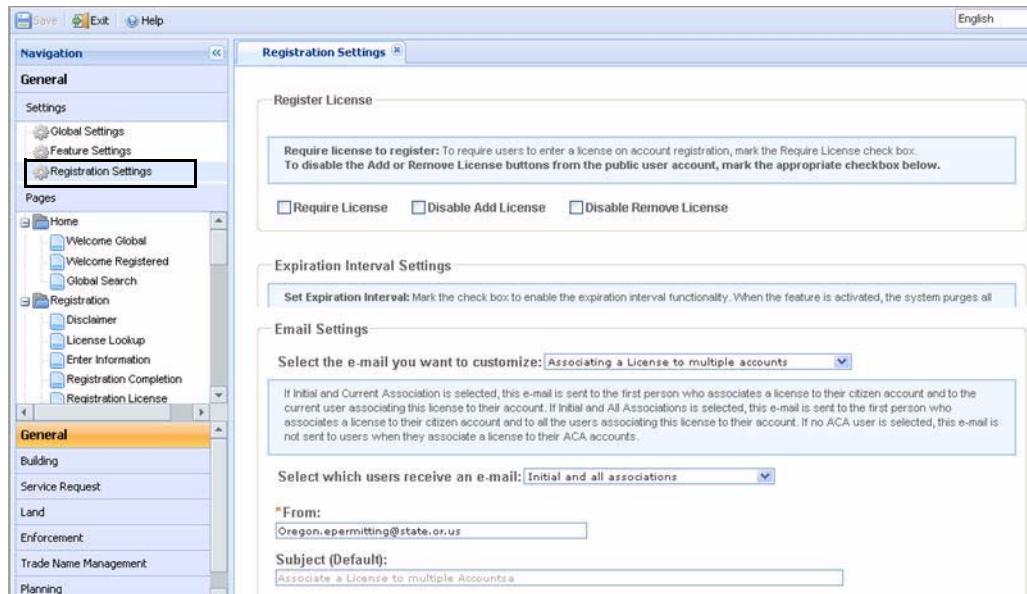
### To view the Feature Settings page

1. Navigate to Citizen Access Setup. For instructions, see [Accessing the Citizen Access Administration Tool on page 19](#).
2. Verify **General** is active in the navigation panel.
3. Locate the **Settings** area and click the **Feature Settings** page. See [Figure 7: Feature Settings Configuration Page](#).

*Citizen Access Setup displays the Feature Settings page in the center panel.*

## Viewing the Registration Settings Page

The Registration Settings page is used to enable features and e-mails relating to registered users, licensed registered users, and the license renewal or modification process. Please refer to the registration and license renewal chapters for detailed information on how to implement the license renewal and modification processes with your ACA website.

**Figure 8: Registration Settings Page**

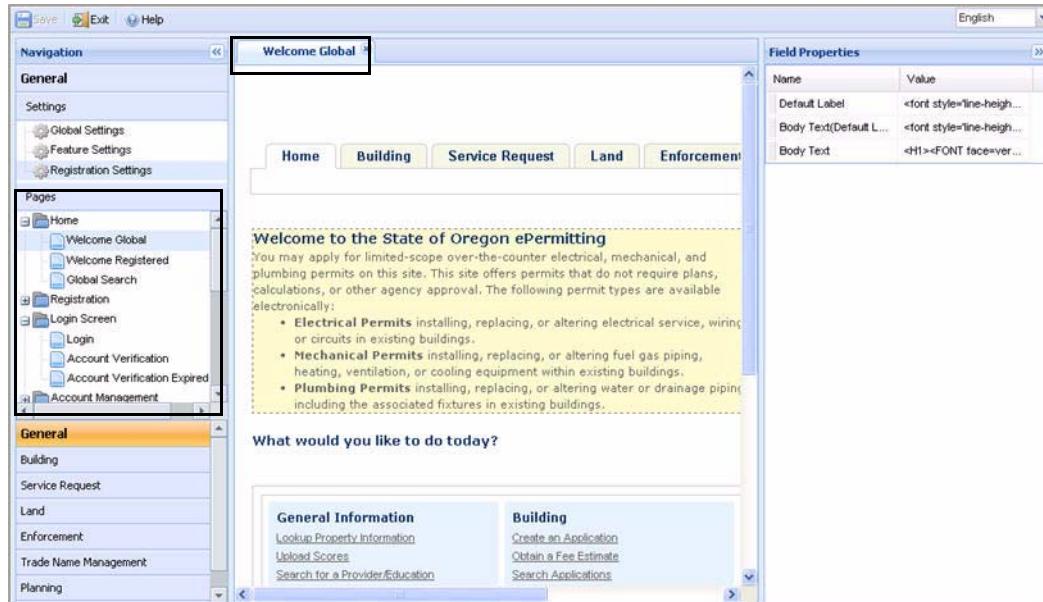
### To view the Registration Settings page

1. Navigate to Citizen Access Setup. For instructions see [Accessing the Citizen Access Administration Tool on page 19](#).
2. Verify **General** is active in the navigation panel.
3. Locate the **Settings** area and click the **Registration Settings** page. See [Figure 8: Registration Settings Page](#).

*Citizen Access Setup displays the Registration Settings page in the center panel.*

## Viewing the General Pages Area

The navigation panel displays general pages that require customization. You can access Web pages by using the +/- buttons to expand a Web Page folder and display the contents in a tree view. See [Figure 9: General Web Pages](#). The General Web page folders include: Home, Registration, Login, Account Management, APO Search, Shopping Cart, Collections, and Provider/Education/Licensee Search. For information on how to customize Web pages, see [Chapter 10: Working with Web Pages](#).

**Figure 9: General Web Pages**

### To view the General Pages area

1. Navigate to Citizen Access Setup. For instructions see [Accessing the Citizen Access Administration Tool on page 19](#).
2. Verify **General** is active in the navigation panel.
3. Locate the **Pages** area to view Web page folders and associated Web pages.
4. Click the Web page you want to customize from the tree view.

*Citizen Access Setup displays the Web page in the center panel. See [Figure 7: Feature Settings Configuration Page](#).*

## Introducing Module Tab Configurations

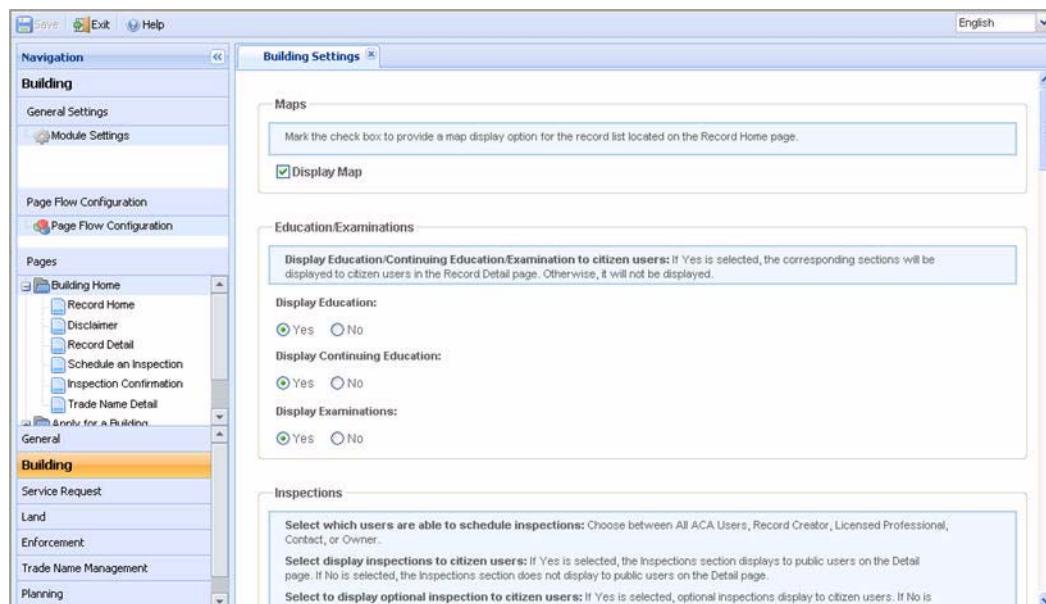
Each module has a corresponding tab in the navigation panel which houses feature functionality and Web pages for the module. Configure features including: maps, education/examinations, inspections, record search functionality, filtering options, user permissions, application status, reporting permissions, and other module-specific features. Define user experience using the Page Flow Configuration page. Customize modular web pages with the text and field functionality that represents agency implementation.

- [Viewing the Module Settings Page](#)
- [Viewing the Page Flow Configuration Page](#)

## Viewing the Module Settings Page

The Module Settings page houses numerous configurations to define modular-specific features and functionality including: maps, education/examinations, inspections, workflow, contact display controls, record search permissions and functionality, filtering options, application status implementation, and report permission control. See [Figure 10: Module Settings Page](#) for an example of a Module Settings page for a Building module. For more information about the configurations on the Module Settings page, see [Chapter 8: Module Settings Configuration Page on page 103](#).

**Figure 10: Module Settings Page**



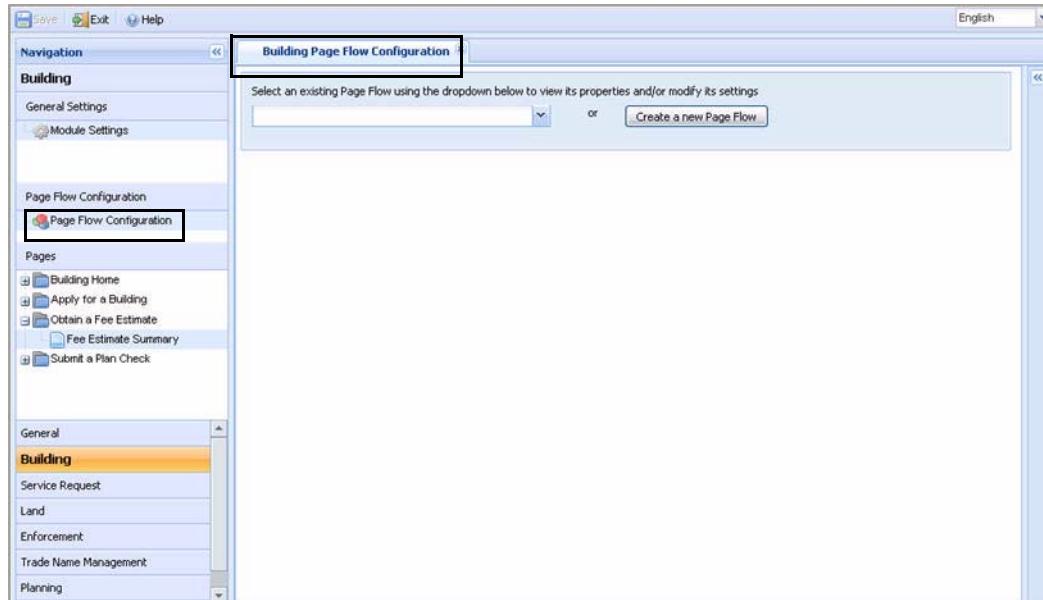
### To view the Module Settings Page

1. Navigate to Citizen Access Setup. For instructions see [Accessing the Citizen Access Administration Tool on page 19](#).
2. Choose a module from the navigation panel.
3. Locate the **General Settings** area and click the **Module Settings** page.

*Citizen Access Setup displays the Module Settings page in the center panel. See [Figure 10: Module Settings Page](#).*

## Viewing the Page Flow Configuration Page

The Page Flow Configuration page is used to define what information is available on Web pages during an intake process. It uses building blocks (pages, steps, and components) to create a unique flow of information customized for and assigned to a record type creating a user experience. See [Figure 11: Page Flow Configuration Page](#). For information on how to configure a page flow, see [Chapter 9: Page Flow Configuration on page 132](#).

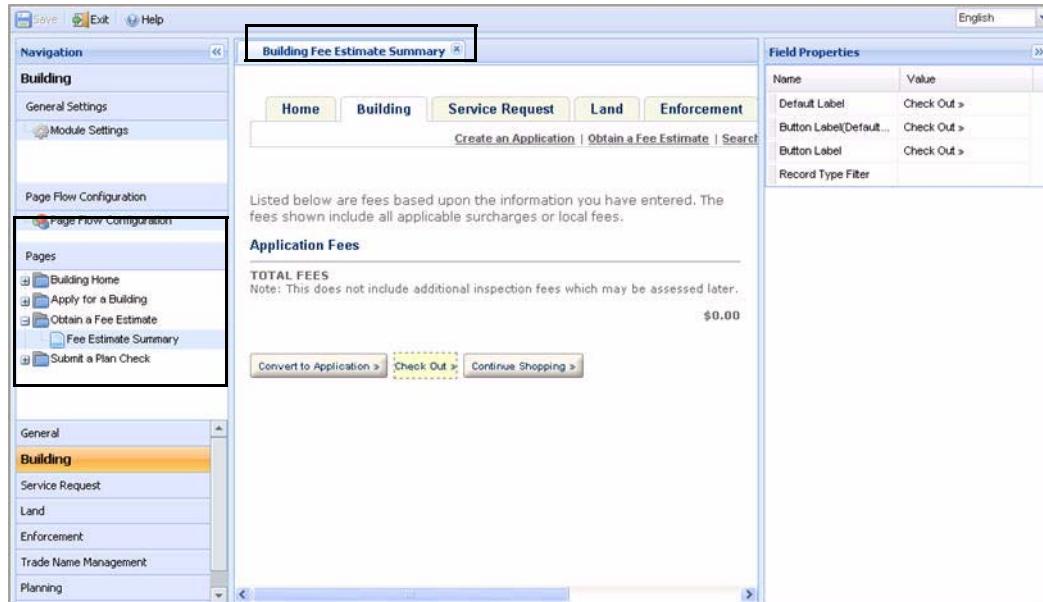
**Figure 11: Page Flow Configuration Page**

### To view the Page Flow Configuration Page

1. Navigate to Citizen Access Setup. For instructions see [Accessing the Citizen Access Administration Tool on page 19](#).
2. Choose a module from the navigation panel.
3. Locate the **Page Flow Configuration** area and select the **Page Flow Configuration** page. *Citizen Access Setup displays the Page Flow Configuration portlet.*
4. Choose an existing Page Flow from drop-down menu or click the **Create a New Page Flow** button.
5. Create a page flow using the configuration building blocks: pages, steps, and components. See [Figure 64: Page Flow Configurations on page 133](#).

## Viewing the Module Pages Area

Citizen Access provides the module name at the beginning of every configuration page for a module. This helps to keep track of the multiple Web pages, Setting, and Configuration pages that may appear similar. Expand the tree view of a Web page folder to view the Web pages requiring customization. Module pages include Home, Inspection pages, Application pages, Fee pages, and Pages for Plan Check implementation. See [Figure 12: Module Pages](#). For information on how to customize a Web page, see [Chapter 10: Working with Web Pages](#).

**Figure 12: Module Pages**

### To view a Module Page

1. Navigate to Citizen Access Setup. For instructions see [Accessing the Citizen Access Administration Tool on page 19](#).
2. Choose a module from the navigation panel.
3. Locate the **Pages** area to view Web page folders and associated Web pages.
4. Click a Web page you want to customize from the tree view.

*Citizen Access Setup displays the Web page in the center panel. See [Figure 12: Module Pages](#).*

**CHAPTER 3:**

# UNDERSTANDING USER ACCOUNTS

---

This chapter introduces you to the various types of Citizen Access users who go online to work with your government agency. This chapter also identifies the configurations to retrieve a forgotten password, log in to the site, and designate a public user as a delegate.

After public users log in to Citizen Access, they can make updates to their account management details by modifying their personal information, grouping the records associated with their account in a collection, or designating another public user to be their delegates. See [Figure 13: Account Management Page](#). You must customize the associated Web pages for these tasks.

Some user types, such as licensed professionals and agency employees, have user-specific configurations that you can apply. Use [Chapter 2: Introducing the Architecture and Interface](#) for directions on how to get to the various areas of Citizen Access Setup so you can perform configurations.

The best practice to use this chapter with the other chapters of implementation as described in [Chapter 11: Implementation Planning](#) so your website reflects the agency services you want to display in Citizen Access.

## Topics

- [Introducing User Types](#)
- [Introducing Registration Options](#)
- [Associating a Contact with a Public User](#)
- [Associating a License with a Public User](#)
- [Enabling Account Management Functionality](#)
- [Managing Public User Passwords](#)
- [Organizing Personal Records in Collections](#)
- [Managing Delegates](#)
- [Defining Agency Employee Display Settings](#)

**Figure 13: Account Management Page**

The screenshot shows the 'Account Management' section of the Accela Civic Platform. At the top, there's a navigation bar with links for Home, LUEG-APCD, Agriculture Weights and Measures, APCD, Building, and AMS. Below this, a sub-navigation bar includes 'Collections (0)', 'Reports (1)', 'Account Management' (which is highlighted with a red box), and 'Logout'. The main content area is titled 'Manage Your Account' and contains a message: 'Your current account information is shown below. Click an Edit button to update information within a section.' A 'Citizen Account' section is shown with tabs for 'Login Information' and 'Contact Information', both with 'Edit' buttons. Under 'Login Information', fields include User Name (sandy.liu), E-mail (sandy.liu@achievo.com), Password (\*\*\*\*\*), Security Question (What is the brand of your first car?), and contact details for shenzhen, sandy.liu@achievo.com, and E-mail. Under 'Contact Information', fields include Home Phone, Work Phone, Mobile Phone, and Fax. Below this is a 'Trust Account Information' section showing a table with columns: Balance, Account ID, Action, Description, Status, and Ledger Account. A note says 'Showing 0-0 of 0' and 'No records found.' There are navigation arrows at the bottom of the table. Further down are sections for 'License Information' (with a link to 'Add a License') and 'Delegates' (with sections for 'People who can access my account' and 'People whose account I can access', both currently empty). A note in 'License Information' says: 'You may add professional license(s) to your public user account by clicking the Add a License button. Your professional license(s) may need to be validated by the agency before you can use it. Smoke Test'.

## Introducing User Types

This manual refers to various users who access Citizen Access. This section provides a description for user types so you know for whom you are configuring features and functionality. User types include anonymous users, public users, registered users, licensed professionals, contacts, owners, record creators, and agency employees.

### Topics

- [Public Users](#)
- [Anonymous Users](#)
- [Registered Users](#)
- [Licensed Professionals](#)
- [Contacts](#)

- Owners
- Record Creator
- Agency Employee

## Public Users

Public users are any persons that visit your Citizen Access website. They include anonymous public users and registered public users, all licensed professional types, owners, contacts, and agency employees. Registered public users have a Public User account in Civic Platform that they or someone at the agency can manage online.

## Anonymous Users

Anonymous users are people that visit the website, but do not have a registered account, or do not log in to their account to perform a task. For example, an anonymous user may want to get a fee estimate for a business license so he can prepare for the impending expenses associated with that process.

## Registered Users

A registered user is any person that has a public user account in ACA. He has gone through the registration process and has username and login information. He may be registered licensed professionals, contacts, owners, and record creators that can login to ACA and perform a task.

## Licensed Professionals

Professionals are contractors, architects, engineers, and developers (CAED) who have received licenses. Professionals can also be business owners, beauticians, pharmacists, doctors, nurses, etc. Anyone that requires a license to provide a service or to do something is a licensed professional.

## Contacts

A contact can be any person that relates to an application or a parcel. For example, it may be the accountant responsible for paying the fees associated with the numerous building permits for a developer. It can be a contact at an attorney's office for a property owner.

## Owners

The person or people who own the related property or parcel. You can relate this person to public user accounts so they have access to an application process. For example, a contractor can share permitting information online by associating the owner with the permit application in ACA.

## Record Creator

The person associated with the completion and submittal of an application. This person may be different than the owner or licensed professional. For example, an administrative assistant may have created a business license renewal record for an architect.

## Agency Employee

Someone that works at the agency and performs tasks to assist in moving an application through the workflow. They may also have relevant tasks to verifying information submitted through Citizen Access. For example, they may have to approve a license associated with a public user account. Agency employees perform their tasks in Civic Platform.

## Authorized Agent

Someone who can manage agent clerks and sell authorized licenses to citizens. An example of the license is fishing and hunting license.

## Authorized Agent Clerk

Someone that an authorized agent creates for selling authorized service licenses to citizens on behalf of the authorized agent.

# Introducing Registration Options

Your agency may want to require public users to register before accessing information in Citizen Access. There are several ways for a user to become registered in the Citizen Access website.

### Topics

- [Registration in Civic Platform](#)
- [Registration in Citizen Access](#)
- [Registration from External System](#)
- [Registering Licensed Professional Accounts by EMSE](#)

## Registration in Civic Platform

As administrators, you can add new public user accounts for Citizen Access directly in the Public User administration portlet in Civic Platform. For more information, see the “Public Users” section in the *Accela Civic Platform Administrator Guide*.

## Registration in Citizen Access

Citizen Access offers a registration process to collect user account information. For information on implementing the registration process in your Citizen Access website, see [Chapter 12: Defining the Registration and Account Management Process on page 222](#).

## Registration from External System

Citizen Access allows public users to log in using an external user account with LDAP authentication or the single sign-on feature. When an external user, for the first time, accesses a Citizen Access page that is accessible to only registered users, Citizen Access creates a new public user account for him and a reference contact for the new account based on the contact information from the external user account. The new Citizen Access user account then has association with the external user account in the later-on Citizen Access access.

**Note:** *Different from normal account registration, Citizen Access does not look for close matches in the reference contacts based on the contact information from the external user account.*

In the Account Management page, an “Update” action option is available for the reference contact created with the external account information. If a public user clicks the Update, the standard contact fields in the reference contact synchronizes with the contact information in the external account.

## Registering Licensed Professional Accounts by EMSE

If your agency uses Citizen Access, you can configure the EMSE script `REFLICPROFADDAFTER` EMSE to create a public user account associated with the new referenced licensed professional with a completed e-mail field on an application. After the intake process, EMSE initiates the public user account registration process in Citizen Access for the referenced professional associated with the e-mail address and sends a validation e-mail. After agency receives the validation, Civic Platform sends the registration confirmation e-mail to the referenced professional.

Only an Accela Implementation specialist or a system administrator who has received training from an Accela Implementation specialist or a Product Manager should write and implement this sample script. Improperly written scripts can seriously damage your system by incorrectly altering or deleting data for many records.

For information on writing and implementing scripts, refer to the *Accela Civic Platform Scripting Guide*.

## Associating a Contact with a Public User

Citizen Access manages contact information about public user accounts as reference contacts associated with public users.

When a public user registers or adds a new contact to his account, if the new contact is a close match with an existing reference contact in the agency, he can confirm whether to associate the reference contact with his account. Otherwise, Citizen Access creates a new reference contact and associates the new reference contact with the public user account.

Each public user account must have approved association with at least an enabled contact to remain enabled and active.

Citizen Access gets the information about the reference contacts that relates to a public user account, and uses the information in various places:

- The auto-fill field in page flows for adding contacts lists the reference contacts and licensed professionals and owners that relate to the user account.
- The following places or fields apply the contact name if there is a single reference contact relating to the public user, or the public user login ID if there is none or more than one reference contacts relating to the public user:
  - “Logged in as” field in the ACA website;
  - Delegate user name and inspection requestor name;
  - UserID parameter for payment API;
  - \$\$UserName\$\$ parameter in email configuration.

**Note:** *The following variables are no longer available in email configuration: \$\$FirstName\$\$, \$\$MiddleName\$\$, \$\$LastName\$\$, \$\$businessName\$\$, \$\$state\$\$, \$\$city\$\$, \$\$address\$\$, and \$\$zip\$\$ parameters.*

- The following places or fields always apply the public user login ID:
  - Public user information passed to EMSE functions or events;
  - “Created by”, “Uploaded by”, and “Modified by” fields in applications;
  - “Uploaded by”, and “Modified by” fields when users upload scores.

There are some changes to the following fields in the public user accounts and their associated contacts:

- These fields are no longer available: Pager, Preferred Phone, User Role.
- These fields hide by default: Mobile Phone and Receive SMS Messages.
- The Preferred Channel field lists the options configured in the Standard Choice CONTACT\_PREFERRED\_CHANNEL. By upgrading to the current version, the previous hard-coded Preferred Channel options are merged to the options in the Standard Choice CONTACT\_PREFERRED\_CHANNEL.

For additional information about associating a contact with a public user, see [Configuring Contact Associations on page 227](#).

## Associating a License with a Public User

Your agency can configure a way for registered public users to associate a license with their public user account. You must perform Standard Choices configuration for successful

implementation. Normally, a licensed professional's public user account has the addition of a license; however, exceptions may exist when the owner of the license wants to extend license privileges to someone. For example, a business owner may want to associate the administrative assistant with the license so she can schedule inspections. When this happens, you must configure the multiple licenses on an account e-mail to notify the owner of the license, the person who associates the license to their account, and also internally to the agency. See [Defining License Notification E-mails on page 102](#).

For additional information about licensing, see [Chapter 18: License Verification and Online Renewal](#).

### To associate a license with a public user

1. Administrators must configure the related Standard Choices.

<b>Standard Choice Configuration of LICENSED PROFESSIONAL TYPE</b>	Standard Choice Values of contractor types. For example, electrical, mechanical, gas, plumbing, and/or general.
<b>Standard Choice ACA_CONFIGS</b>	Standard Choices Value: PA_EMAIL_VERIFICATION Value Desc: NO - all citizen registration requests do not require activation by agency Value Desc: YES - all citizen registration requests do require activation by agency before use
<b>Standard Choice ACA_EMAIL_REGISTRATION_TO</b>	Enter each e-mail address in a Standard Choice Value field to include it in the "CC" line of the registration e-mail and designate it to receive a copy.

2. Configure associated scripts.
  - RegistrationSubmitAfter
  - RegistrationSubmitBefore
3. Enable or Disable Associated Functional Identification (FID) numbers.
  - a. Enable 8223 and disable 8224 for access to activate a license.
  - b. Enable 8224 to create/edit public user information.
4. Customize the ACA\_MESSAGE\_ASSOCIATING\_LICENSE\_TO\_MULTIPLE\_ACCOUNTS notification template in Civic Platform, by navigating to **Administration > Setup > Communication Manager > Notification Templates**.

Refer to the Notification Templates section of the *Accela Civic Platform Administrator Guide*.

For more information on **Associating a License to Multiple Accounts**, see [Defining License Notification E-mails on page 102](#).

## Enabling Account Management Functionality

Visitors to your Citizen Access website can register for a Public User account. The account information is available online with the registrant and also available in Civic Platform for agency users to manage. By default, public users can manage their own public user accounts online on the Account Management page. They can access this page by clicking the Account Management link from the Welcome registered page and edit their account information on the Account Management page as necessary. To set up the account management feature, you must enable the following links: Register for an account, Login, and Account Management on the Feature Settings page. Then, you must customize the Account Management page, Welcome Global page, Welcome Registered page, and the Login page. Specially, for licensed professional users to upload attachments to their accounts, you can enable the people attachments feature in the Global Settings page.

### To enable account management functionality

1. Navigate to the **Feature Settings** page.

*Citizen Access displays a column of features and modules.*

2. Complete the following:

- Mark the **Registration** check box to display the registration links on the Welcome Global page and the Login page.
- Mark the **Account Management** check box to display the Account Management link on the Welcome Registered page.
- Mark the **Login** check box to display the login link on the Welcome Global page.

3. Click **Save**.

4. Go to the Pages area in the navigation panel.

5. Customize the following pages in the Home folder. For customization tasks, see [Chapter 10: Working with Web Pages](#).

- Welcome Global
- Welcome Registered

6. Customize the following page in the **Login Screen** folder:

- Login

7. Customize the pages in the **Account Management** folder. For more information, see [Customizing Registration and Account Management Web Pages on page 225](#).

8. Click **Save** on each page to save, individually, what you customize.

## Managing Public User Passwords

Public users can create their own user name and password for Citizen Access. When the instance happens that public users forget their user name or password, they can resolve this situation in a few different ways. They can click the hyperlink on the Citizen Access Home page

to request sending the username and password information to them by e-mail. See [Figure 14: Forgotten Password Link](#). Public Users can also request their information in person or by phone. In this situation, agency employees can access the public user account information through the Public User portlet in Civic Platform. The public user account holds contact and security information about identity verification.

When a public user requests that you reset his password either in person or by phone, ask him his security question and verify the user's identity. Then, you send him a new system generated password e-mail.

If you need to customize the Password E-mail, customize the related e-mail notification template in Civic Platform, by navigating to **Administration > Setup > Communication Manager > Notification Templates**. Refer to the Notification Templates section of the *Accela Civic Platform Administrator Guide*.

**Figure 14: Forgotten Password Link**

The screenshot shows the 'ON-LINE SERVICES' header with links for 'Register for an Account', 'Reports (2)', and 'Login'. Below the header is a search bar and a 'more' dropdown. A navigation menu includes 'Home', 'Building', 'Service Request', 'Land', 'Enforcement', and 'more'. The main content area has two sections: 'Please Log in' (for existing users) and 'New Users' (for new users). The 'Please Log in' section contains a 'User Name or E-mail:' input field, a 'Password:' input field, a 'Log in >' button, and a checked 'Remember me on this computer' checkbox. The 'New Users' section contains a 'Register Now >' link. At the bottom right of the login form, there are links for 'I've Forgotten my password' and 'New Users: Register for an Account'.

## Topics

- [Changing Passwords Manually](#)
- [Automating Forgotten Passwords](#)

## Changing Passwords Manually

In the instance that public users forget their password, an agency employee can manually send a forgotten password e-mail to them. Authorized agency employees can access the public user account information in the Public User portlet in Civic Platform. The public user portlet holds account details including contact and security information about identity verification.

When a public user requests that you reset their password either in person or by phone, ask him his security question and verify the user's identity. Then, you send him a new system generated password e-mail.

For information on how to manually change a user password, see “[Changing a User Password](#)” in the *Accela Civic Platform Administrator Guide*.

## Automating Forgotten Passwords

Your agency can automate the forgotten password e-mail. To do this, you must display the “I’ve forgotten my password” link on the Login page and the Send Password button in the Public User portlet in Civic Platform. This allows public users to answer their security questions from the Welcome page and Civic Platform can generate a temporary password. Agency employees can go to their public user account and click the Send Password button to manually send the Password Reset e-mail. When they are logged into Citizen Access using the temporary password from the e-mail, they can change their password on their Account Management page.

### To automate forgotten passwords

1. Display Forgotten Password button and link.  
Verify the password fields are set to read-only in the Public User portlet of Civic Platform.
2. Define the Forgotten Password e-mail, as follows:  
Customize the related e-mail notification template in Civic Platform, by navigating to **Administration > Setup > Communication Manager > Notification Templates**.  
Refer to the Notification Templates section of the *Accela Civic Platform Administrator Guide*.
3. Customize the related forgotten password Web page.
  - a. Verify General is active in the navigation panel.
  - b. Go to the Pages area and select the **Login** page.
  - c. If necessary, customize the Login Web page. See [Chapter 10: Working with Web Pages](#).
  - d. Click **Save**.

## Organizing Personal Records in Collections

Public users can create personal folders to organize and manage their records online using the collections feature. Citizen Access provides details about all the records grouped in the collection including an Inspections Summary and Fees Summary. The inspection summary provides the number of scheduled, rescheduled, approved, denied, pending and canceled inspections. The Fees Summary includes the total amount of fees paid and total amount of fees due for all records in the collection. See [Figure 15: Records Organized in a Collection](#).

Public users create a collection by navigating to a records list and marking check boxes next to the records they want to organize into a group. Then, they click the ‘Add to collection’ link. Citizen Access displays a pop-up window where they can enter a name and description for the group. After the group is organized, they can view the summary information and manage the contents. They can also rename or delete the collection at any time. Public users can view their collections by clicking the Collections link at the top of any Web page in ACA.

This feature is useful for contractors who work on multiple projects. The contractor can create a folder for each project, manage the numerous permits associated with the project, and pay all associated fees online. A hospital can use this feature to help with organizing license renewals with professionals who work at their facility. The hospital administrator can create a folder to manage nurse licenses or physician licenses.

Administrators must customize the associated collection pages for this feature. Optionally, they can customize the headings and link labels associated with this feature. For example, your agency may want to change the link label from Collections to My Projects.

**Figure 15: Records Organized in a Collection**

The screenshot shows the City of Bridgeview Citizen Access website. At the top, there's a logo for the City of Bridgeview and the tagline "CONNECTING CITIZENS WITH THEIR GOVERNMENT". The navigation bar includes links for Home, Government, Business, Residents, and Visitors, along with a search bar. Below the navigation is a "ON-LINE SERVICES" section with a sub-menu for Building, Service Request, Land, Enforcement, and more. The main content area is titled "Nate's Permits" and describes it as a "Project II collection". It shows a summary: "Total Records: 3 (3 Building)", "Inspections Summary: 8 (6 Scheduled, 0 Rescheduled, 2 Approved, 0 Denied, 0 Pending, 0 Cancelled)", and "Fees Summary: \$0.00 Paid, \$6.50 Due". There are buttons for "Rename Collection" and "Delete Collection". Below this, there's a table listing three permits under the "Building" category. The table columns are Date, ID, Record Type, Agency, Description, Project Name, and Address. The records are:

Date	ID	Record Type	Agency	Description	Project Name	Address
03/11/2009	09PLB-B-00000-00008	Residential Plumbing Permit	FLAGSTAFF			
01/27/2009	09PLB-B-00000-00003	Residential Plumbing Permit	FLAGSTAFF			
12/10/2008	09PLB-B-00000-00027	Residential Plumbing Permit	FLAGSTAFF			

### To set up collections

1. Verify General is active in the navigation panel.
2. Go to the **Pages** area and expand the Collections folder.
3. Customize the Web pages associated with Collections. For example, you can change the labels from Collections to My Projects.
  - **Collections Management** page
  - **Collection Detail** page

*Citizen Access displays the customized labels.*

The following is a list of your projects. Click on a Project name to manage its contents.

Showing 0-0 of 0

Date Modified	Name	Description	Number of Records

**4. Click Save.**

**5. If necessary, change the link associated with this feature on a Welcome page.**

- Welcome Registered page



<b>General Information</b>	<b>Building</b>
<a href="#">Lookup Property Information</a>	<a href="#">Create an Application</a>
<a href="#">Upload Scores</a>	<a href="#">Obtain a Fee Estimate</a>
<a href="#">Search for a Provider/Education</a>	<a href="#">Search Applications</a>
<a href="#">Search for a Licensee</a>	
<b>Service Request</b>	<b>Land</b>
<a href="#">Apply for a Service Request</a>	<a href="#">Create an Application</a>
<a href="#">Obtain a Fee Estimate</a>	<a href="#">Obtain a Fee Estimate</a>
<a href="#">Search Service Requests</a>	<a href="#">Search Applications</a>
<b>Enforcement</b>	<b>Trade Name Management</b>
<a href="#">Create a Code Enforcement Case</a>	<a href="#">Create an Application</a>
<a href="#">Obtain a Fee Estimate</a>	<a href="#">Request a Trade license</a>
<a href="#">Search Code Enforcement Cases</a>	<a href="#">Search Trade Names</a>

**6. Click Save.**

*Citizen Access is set up so public users can organize records in a group collection.*

# Managing Delegates

You can configure ACA to provide public users with the ability to designate other public users as their delegates and grant the delegates permissions to access their data. Delegates can work on the data based on the granted permissions, such as viewing records, scheduling inspections, creating, renewing and amending records, uploading, downloading and deleting documents, and making payment.

## Topics

- [Understanding the Delegate Functionality](#)
- [Implementing Delegate Functionality](#)

## Understanding the Delegate Functionality

You can enable the delegate functionality so public users can designate other public users as their delegates to work on their data based on the granted permissions.

With the delegate functionality enabled, a Delegates section displays in the Account Management page in public users' account. Public users can designate other public users to be their delegates by clicking the "Add a delegate" link, completing the Add a Delegate form and submitting it. In response, Citizen Access sends an e-mail to public users to notify them that they are invited to be delegates. Meanwhile, an invitation is appended to the invited public users' Delegates section. See [Figure 16: Pending Invitation](#) for the pending invitation in invited public users' Delegates section.

**Figure 16: Pending Invitation**

The screenshot shows the 'Delegates' section of a Citizen Access account. It includes a header 'Delegates', a 'People who can access my account' section listing 'Amy' and 'Tracy' with 'Actions' dropdowns, a 'People whose account I can access' section listing 'sandy liu' with 'Accept' and 'Reject' buttons, and a footer with a 'Show all declined or expired items' link.

People who can access my account	
Amy (████████@accela.com)	<a href="#">Actions▼</a>
Last accessed account on 12/21/2010	
Tracy (████████@accela.com)	<a href="#">View Invitation</a>
Invitation sent on 12/21/2010	

People whose account I can access	
sandy liu (████████@accela.com)	<a href="#">Accept</a> <a href="#">Reject</a>
Invitation received on 12/21/2010	

The invited public users can accept or reject invitations. When the invited public users accept the invitation, they officially become the delegate of the public users who invited them. The rejected or expired invitation is purged from their account when the invitation purge day arrives.

You can configure the invitation expiration day and purge day in the Global Settings page. For more details on how to configure invitation expiration day and purge day, see [Delegates Settings on page 73](#).

When a public user designate delegates, they can grant them permissions to their data. Public users can grant these levels of permission: view, schedule inspections, create, renew, and amend record, upload, download, and delete documents, and make payments. See [Figure 17: Assigning Permissions](#). The access permission that a public user can assign to a delegate is limited to the access right that he/she owns. For example, if a user enables his delegate to create applications in all categories, the delegate can create applications in all the categories that the user himself has access to.

**Figure 17: Assigning Permissions**

The screenshot shows a modal dialog titled "Add a Delegate". It includes fields for "Name" and "E-mail Address". A section titled "Select Permissions for this delegate" contains a note about delegate access across categories and a list of permissions with "Change" links. At the bottom, there's a CAPTCHA field and buttons for "Invite Delegate" and "Cancel".

**Add a Delegate**

Enter the name and email address of the person to whom you would like to grant delegate access to your account

Test

\* Name      \* E-mail Address

Select Permissions for this delegate

Delegates can view records across all categories unless you choose to restrict them to specific categories

View Records in all categories ([Change](#))

For the following permissions, the available categories are limited to the ones that you have granted the delegate access to view records

Create Applications in all categories ([Change](#))  
 Renew Records in all categories ([Change](#))  
 Amend Records in all categories ([Change](#))  
 Manage Inspections in all categories ([Change](#))  
 Manage Documents in all categories ([Change](#))  
 Make Payments in all categories ([Change](#))

Add a personal note to the invitation

Enter the words in the image into the field below

Leyanz same

reCAPTCHA  
stop spam.  
read books.

**Invite Delegate**    **Cancel**

The data that is viewable to delegates displays in the delegates' account along with their own data. See [Figure 18: Displaying Data in Delegate's Account](#). A delegate can work on another public user's data based on the granted permissions.

**Figure 18: Displaying Data in Delegate's Account**

The screenshot shows a web interface for managing permits. At the top, there is a navigation bar with tabs: Home, Licenses, Code Enforcement, Planning, Service Request, Building, and more. Below the navigation bar, there are links: Manage my Permits, Apply for a Building Permit, Obtain a Fee Estimate, and Schedule an Inspection.

**Records**

Showing 1-10 of 42 | [Add to collection](#) | [Add to cart](#)

<input type="checkbox"/> Date	Record Number	Record Type	Created By	Action	Description	Status
<input type="checkbox"/> 12/15/2010	10CAP-00000018	ACA LP Contact	Jing Liu			
<input type="checkbox"/> 12/15/2010	10TMP-000269	ACA LP Contact	Jing Liu	<a href="#">Resume Application</a>		
<input type="checkbox"/> 12/15/2010	10CAP-00000017	ACA LP Contact	Amy Bao			
<input type="checkbox"/> 12/15/2010	10CAP-00000016	ACA LP Contact	Amy Bao			
<input type="checkbox"/> 12/14/2010	10TMP-000255	ACA LP Contact	Amy Bao	<a href="#">Resume Application</a>		
<input type="checkbox"/> 12/13/2010	10CAP-00000014	ACA Inspection BLDG	Nicole Zou			
<input type="checkbox"/> 12/13/2010	10TMP-000253	ACA LP Contact	Jing Liu	<a href="#">Resume Application</a>		

< Prev 1 2 3 4 5 Next >

**Search for Records**

Enter information below to search the City's permitting database. Permits can be searched for by entering any of the following information:

- Address
- Licensed Professional Information
- Record Information
- Contact

Use the drop-down menu to change the Search type.

**General Search** General Search

Here is instruction test with [link to AA](#).

Public users can terminate the delegate relationship by removing them from their Delegates section at any time. In this way, the granted permissions are revoked from the delegates, thus the removed delegates can no longer view or work on the data of the public users they act on behalf of. See [Figure 19: Terminating Delegate Relationship](#).

**Figure 19: Terminating Delegate Relationship**

The screenshot shows the 'Delegates' section of the Accela Civic Platform. It includes sections for 'People who can access my account' and 'People whose account I can access'. For each delegate listed, there is an 'Actions' dropdown menu with options like 'View Invitation', 'Edit Permissions', and 'Remove'. A tooltip for the 'Actions' menu indicates it includes 'View Permissions' and 'Edit Permissions'.

Delegate Details	Action Options
Donna Teller (dteller@hotmail.com) Invitation sent on 11/23/2010	View Invitation
James Garrett (g.james@yahoo.com) Last accessed account on 12/13/2010	Actions▼ View Permissions Edit Permissions
Betty Lee (bettylee@163.com) Last accessed account on 11/24/2010	Actions▼ View Permissions Edit Permissions
Peggy Huang (peggy.huang@hotmail.com) Last accessed account on 12/21/2010	Actions▼ View Permissions Edit Permissions

## Implementing Delegate Functionality

This section provides a list of configuration steps to fully implement delegate functionality.

### To implement delegate functionality on your site

1. As a pre-requisite to displaying the Delegate section in the Account Management page in public users' account, you must enable the Account Management functionality. For more information about the Account Management, see [Enabling Account Management Functionality on page 40](#).
2. Configure the related Standard Choice BATCH\_JOB\_SERVICE\_CATEGORY with Standard Choice Value Proxy User Process. For complete information on configuring a Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.
3. Schedule a batch job in Civic Platform to set invitations to expired or purge expired or declined invitations from database at the end of the time intervals. For complete information on creating a batch job, refer to the "Batch Engine" chapter of the *Accela Civic Platform Administrator Guide*.
4. Enable the delegate functionality to allow public users to manage their delegates in ACA. For more information about the configuration, see [Delegates Settings on page 73](#).

*Citizen Access displays the Delegates section in the Account Management page in public users' account.*

**Manage Your Account**

Your current account information is shown below. Click an Edit button to update information within a section.

Account Type	
Citizen Account	

Login Information		Contact Information	
User Name:	peggy.huang	title	pegg Peggy Yan Huang
E-mail:	peggy.huang@hotmail.com	Account of	Peggy
Password:	*****	GuangDong	
Security Question:	What is the name of your first pet?	Preferred Method of Contact:	E-mail
		Home Phone:	138-001-3800
		Work Phone:	100-861-0086
		Mobile Phone:	075-586-1978
		Fax:	075-526-1398

Trust Account Information					
Balance	Account ID	Action	Description	Status	Ledger Account
Showing 0-0 of 0 No records found.					

License Information	
You may add professional license(s) to your public user account by clicking the Add a License button. Your professional license(s) may need to be validated by the agency before you can use it. Smoke Test	
<a href="#">Add a License »</a> Add a License	

Delegates	
45646565	
<a href="#">Add a delegate</a>	
People who can access my account	
<a href="#">Add a delegate</a>	
People whose account I can access	
None	

5. Customize the content of the Delegate Notice e-mail by navigating to **Administration > Setup > Communication Manager > Notification Templates**.

Refer to the Notification Templates section of the *Accela Civic Platform Administrator Guide*.

When an Add a Delegate form is successfully submitted, Citizen Access sends an e-mail to the delegate's e-mail address specified in the Add a Delegate form notifying that a public user invites them to be their delegate.

6. Configure the Manage Delegate web page located in the Delegate folder in the General Pages area. For customization steps, see [Chapter 10: Working with Web Pages](#).

## Defining Agency Employee Display Settings

You can configure how the user name of an agency employee displays in Citizen Access; that is, whether you want to display the first and last names or the user initials. You can also determine if you want the e-mail address available to public users in Citizen Access so public users can notify agency about the completion of a required application task. These features are particularly useful when tracking who makes changes to an inspection or workflow. Citizen Access notes any modifications as part of the history along with the identification information

about the person who made them. For example, the software displays the user initials associated with the user that assigned an inspection to an inspector or rescheduled the inspection.

#### Topics

- [Defining the Display of User Names or User Initials](#)
- [Displaying User E-mail Addresses](#)

## Defining the Display of User Names or User Initials

By default, the first and last names of agency employees display in Citizen Access. You can choose to display the user's initials instead, and can determine whether to display the initials for all or part of the users. [Table 2: Fields Supporting Displaying Users' Initials on page 52](#) lists the fields that display initials in the Citizen Access website.

#### Topics

- [Setting Initials for a User](#)
- [Enabling the Display Initials Option](#)

## Setting Initials for a User

To display a user's initials, you must first ensure the user name has initials set on the user profile. Otherwise, even if you enable the Display Initials option (see [Enabling the Display Initials Option on page 51](#)), Citizen Access still displays the user full name, or displays the user ID if the user has no full name.

#### To set initials for a user

1. Navigate to **Classic Administration** and click the **Admin Tools** tab.
2. Choose **User Profile > Users**.  
*Civic Platform displays the User Profile Add/Edit page*
3. Enter search criteria and click the **Submit** button to select an existing user.  
*Civic Platform displays the User-Edit page for the user.*
4. Locate the **Initials Field** and enter the user initials you want to display for the user.

**User - Edit**

Use this form to edit User.

AA User  External User

User Login ID: JUDY

New Password:  Password Strength [Requirements](#)

Confirm Password:

Distinguished Name:

User Name: First  Mi  Last

Initials:

Display Initials in ACA:

**Note:** See [Enabling the Display Initials Option on page 51](#) for information on configuring the Display Initials in ACA option.

- Click **Save** to save your change.

## Enabling the Display Initials Option

You can configure the Display Initials option for all users or selected users.

### To enable the Display Initials for all users

- Navigate to **Global Settings > Access and Display Settings** in ACA Admin.

*Citizen Access Setup displays the Access and Display Settings section.*

Access and Display Settings

Display Users' Initials: Mark the check box to display the users' initials.  
Display Check Boxes in the Record List for Anonymous Users and Allow Them to Select Records: Mark the check box to display check boxes in record list for anonymous users.  
Restrict Who Can View Reports in All Pages for the Home Page: Choose among All ACA Users,Anonymous Users,Registered User and Licensed Professional.

Display Users' Initials  
 Display Check Boxes in the Record List for Anonymous Users and Allow Them to Select Records

Report Display Controls

Role Assignment				
Available Reports	ALL ACA Users	Anonymous Users	Registered User	Licensed Professional
Email_Report	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Receipt Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Summary Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**OK** **Cancel**

- Mark the **Display Users' Initials** check box.
- Click the **Save** button.

*Citizen Access will display users' initials for all users. [Table 2: Fields Supporting Displaying Users' Initials on page 52](#) lists the fields that display initials in the Citizen Access website.*

### To enable the Display Initials for selected users

1. Complete the following steps to disable the Display Initials setting for all users.
  - a. Navigate to **Global Settings > Access and Display Settings** in ACA Admin.
  - b. Unmark the **Display Users' Initials** check box, and click **Save**.
2. Navigate to **Classic Administration** and click the **Admin Tools** tab.
3. Choose **User Profile > Users**.
 

*Civic Platform displays the User Profile Add/Edit page*
4. Enter search criteria and click the **Submit** button to select an existing user.
 

*Civic Platform displays the User-Edit page for the user.*
5. Mark the **Display Initials in ACA** check box, and click **Save**.
 

*Citizen Access will display users' initials for the selected user. Table 2: Fields Supporting Displaying Users' Initials on page 52 lists the fields that display initials in the Citizen Access website.*
6. If you want to enable the Display Initials setting for more users, repeat step 4 and step 5.

**Table 2: Fields Supporting Displaying Users' Initials**

Component	Web Page	Section	Fields
Workflow	Record Detail	Process Status	Assigned To, Action By
		Status	Updated By (or Last Updated)
	Inspection Detail	Status History	Inspector, Updated By
		Result Comments	Updated By
		Food Facility Inspection Detail	Inspector
	Record Detail	Upcoming, Completed	Inspector
		Completed	Inspector, Operator
Condition	Pay Fee Due Receipt, Renewal Receipt, Shopping cart, Receipt, Record Detail	Condition, Conditions of Approval	Action By User, Action By User, Applied By User
	Condition Details	Conditions of Approval Detail	Action By User, Action By User, Applied By User

**Table 2: Fields Supporting Displaying Users' Initials (Continued)**

Component	Web Page	Section	Fields
Record	Facebook Home	My Shared List	Created By
	Record Home, Show Record Dialog accessed from Accela GIS (Silverlight version), Collections Detail	Record List	Created By
	Fishing & Hunting License Sales folder > Customer Details	Associated Licenses	Created By
AMCA	Inspection	Schedule or Request an Inspection, Completed, Status History	Inspector
		Status	Resulted by
		Status History, Result Comments	Updated By
	Workflow	Process Status	Assigned To, Action By

## Displaying User E-mail Addresses

Administrators can configure the ability to display an e-mail address belonging to an agency user associated with the plan review process for a record in the record details area of Citizen Access. An agency may want to use this feature so citizens can notify the agency by e-mail about the progress or completion of an action item related to a failed inspection.

The e-mail address field on the user profile for the assigned person populates the contact e-mail address displaying to public users on the workflow. For example, if Stan from the agency changed the status of the workflow, the e-mail address defined in his user profile displays in the processing status section of the record details page in Citizen Access. Those public users associated with the record can click the e-mail address hyperlink and make e-mail communications with the agency about new developments for the record. See [Figure 20: Viewing the E-mail Address Associated with Processing a Record](#). For information on how to access the user profile to set an e-mail address, refer to the “User Profile” section in the *Accela Civic Platform Administrator Guide*.

This feature may be implemented in two ways. One way is to display an e-mail address for individual record set by agency. The other way is to define a standard feature, through the Standard Choice WORKFLOW\_CONFIGS, so all records provide an e-mail contact in the process status area of Citizen Access.

If your agency wants to implement this feature for all records at the agency, you must mark the check box associated with this feature in Citizen Access Setup. This ACA setting overrides any settings at the record level in Civic Platform.

If your agency prefers to customize which records display e-mail addresses in ACA and which ones do not, you must clear the check box associated with this feature in Citizen Access Setup.

Then, administrators control which records display e-mail addresses by marking a setting in the record workflow task details in Civic Platform.

Figure 20: Viewing the E-mail Address Associated with Processing a Record

The screenshot shows the 'Processing Status' page with three workflow tasks listed:

- Application Acceptance:** AA-Accepted (08/25/2008) Jason C McDonald ([jmcDonald@accela.com](mailto:jmcDonald@accela.com))  
The initial examination of the Pre-Submission Application and supporting documents is complete. The packet has been submitted to Planning Department for staff review. Please monitor the process by logging onto the County's web site at [www.county.gov](http://www.county.gov).
- Building Review:** BR-Approved (08/25/2008) Jason C McDonald ([jmcDonald@accela.com](mailto:jmcDonald@accela.com))  
Building Plans Review Approved Building Plan Review is complete and released.
- Engineering Review:** ER-Approved (08/25/2008) Jason C McDonald ([jmcDonald@accela.com](mailto:jmcDonald@accela.com))  
Electrical Code review is complete and approved as submitted by the applicant. The Electrical Code Review completed released and for the Permit Pre-Issue evaluation.

**Additional Information:**

Inspector Name	Sam F Wong
Energy Code Applicable	No

**Overall Plan Check:**

Permit Issuance
Inspection
Permit Expires
Certificate of Occupancy
Notify Power
Closure

### To display e-mail addresses to public users

1. Verify agency users have e-mail addresses defined in their user profile. For information on how to set up a user profile, refer to the "User Profile" section in the *Accela Civic Platform Administrator Guide*.
2. Configure the Standard Choice WORKFLOW\_CONFIGS by defining the values listed below.

For complete information on configuring a Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

Type	Choose System Switch
Value	ACA_ENABLE_WF_DISP_EMAIL
	This value determines the default setting for the e-mail display option on the workflow task detail page in Civic Platform.

**Value Description** Enter either Yes or No. Yes to display e-mail in ACA by default. No to hide e-mail display in ACA by default.

3. Set the agency e-mail display setting in Citizen Access Setup to reflect the way you want to implement this feature. Mark the check box to display e-mails on all records. Clear the check box to hide e-mails for all records by default and enable the ability to control the e-mail display at each individual record level.

- a. Navigate to **Civic Platform Administration**.
- b. In the **Setup** portlet, choose **Citizen Access > Citizen Access Setup** from the drop-down menu.

*Civic Platform displays the Citizen Access Setup portal.*
- c. Select a **<Module>** tab and go to the **<Module> Settings** page.
- d. Go to the **Workflow** section of the page and mark or clear the **Display email address** check box.

The screenshot shows a user interface for 'Workflow' settings. A tooltip above a checkbox says: 'Display Email Address: Mark the check box to allow an email address to display for the task list of Processing Status section on the Record detail page.' Below the tooltip is a checkbox labeled 'Display Email Address' which has a checked mark.

- e. Click **Save**.
4. If applicable, administrators and users can enable the display of e-mail addresses at the record level. This setting is available based on the administrative agency e-mail display setting as described in step.
    - a. Find the application you want to work with.

Navigate to the **<Building Permit>** portlet and click the **Search** button.  
*Civic Platform displays the record search form.*
    - b. Enter your search criteria in available fields. For a description of the fields, see the "Application Field Definitions" list in the "Applications" chapter in the *Accela Civic Platform User Guide*.
    - c. Click the **Workflow** secondary tab.

- d. Locate the **Display Email Address in ACA** check box and mark it so this record provides a contact e-mail address in the Process Status section.

The screenshot shows the 'Task Details - Application Acceptance' page for Building Permit ID: 09D07 00000 00003. The 'Assigned Date' and 'Due Date' are both set to 06/24/2009. The 'Action By Department' dropdown is set to 'Building'. The 'Status Date' is 06/29/2009. The 'Comments' section contains a link to 'Standard Comment'. The 'Billable' checkbox is unchecked. The 'Est. Completion Date' field is empty. The 'Comment Display in ACA' section includes checkboxes for 'All ACA Users', 'CAP Creator', 'Licensed Professional', 'Contact', and 'Owner', with 'All ACA Users' checked. The 'Display Email Address in ACA' checkbox is also checked and highlighted with a black border. At the bottom, there are fields for 'All materials complete' (radio buttons for Yes and No), 'Enter your name' (Text input), and 'Start Date' (Date input). A 'Start Time' dropdown menu is open, showing the option '...Select...'.

- e. Click **Submit**.

## CHAPTER 4:

# GLOBAL SETTINGS CONFIGURATION PAGE

Use the Global Settings page to enable features and functionality compatible with any module. The page comprises multiple sections. Each section requires configuration. Many of the configurations on the Global Settings page are only a small part of the larger configuration process for a feature. Therefore, it is important to determine what feature you want to implement and follow the configuration steps for a successful feature setup. The Global Settings page houses some of the configurations: FEIN mask setting, announcement setting, search settings, access and display settings, fees and check-out setup, delegate settings, parcel genealogy settings, GIS feature, internationalization, examination settings, inspection result setting, and display settings. It also reviews the GIS feature, internationalization and cache management. This is also where you define the official website URL and custom CSS style.

**Note:** *If your agency implements the Registration feature, then you customize the registration e-mails on the Registration Settings page of the ACA Admin. For further information on setting up registration, see Chapter 12: Defining the Registration and Account Management Process on page 222.*

### Topics

- Official Website
- Global Features
- Access and Display Settings
- Search Settings
- Fees and Check-out
- Delegates Settings
- Parcel Genealogy Settings
- Examination Setting
- Inspection Result Setting
- Defining Your Own CSS Style

## Official Website

Define the official website for the agency. This URL is particularly useful during record creation in a multiple agency services environment. During the application process, public users search

for a work location by address. If Civic Platform cannot find a work location address, Civic Platform redirects the public user to the Official website. See [Figure 21: Official Website](#).

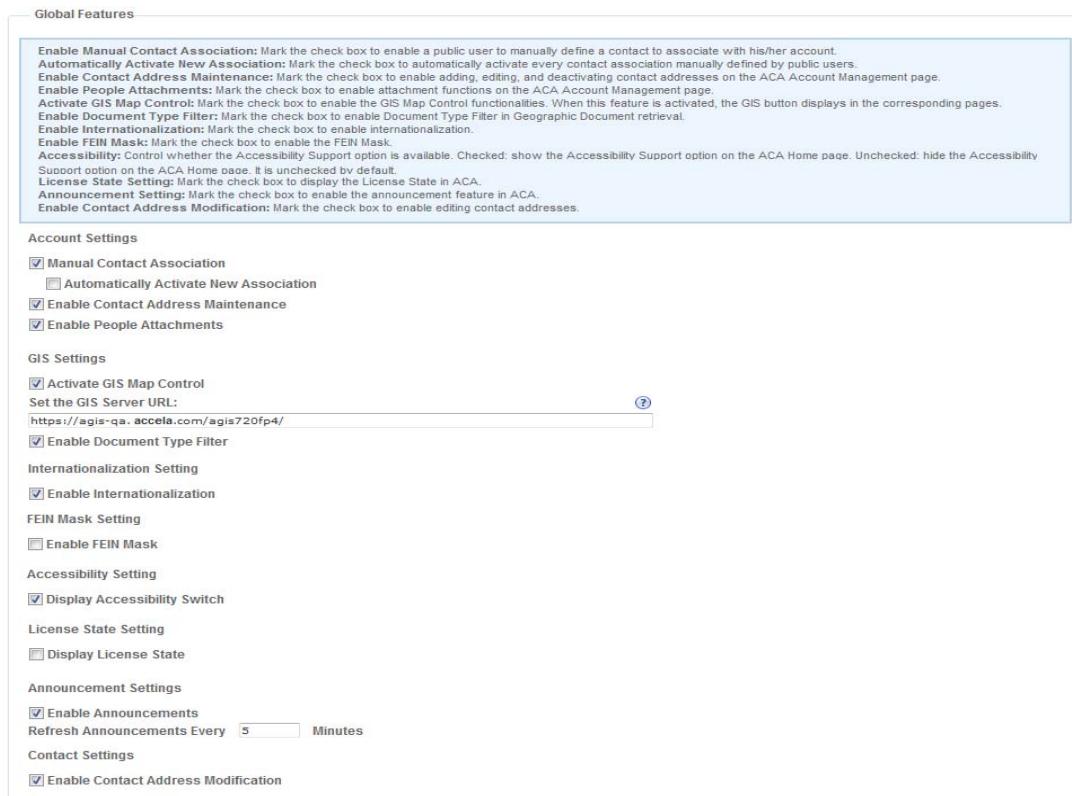
**Figure 21: Official Website**

The screenshot shows a configuration interface for the 'Official Website'. At the top, it says 'Official Website -'. Below that is a descriptive text box: 'Official Website Setting: Enter the URL of the official website. This will be used to direct the user to the official website for additional information when a work location cannot be found during the application process.' Below this is a text input field labeled 'Enter the Official Website URL:' with a placeholder 'http://www.yourwebsite.com'.

## Global Features

Define the following global features: account settings, GIS settings, internationalization settings, FEIN Mask, accessibility functionality for your website, whether or not to display the state prefix with license numbers, and whether to display announcements for users. See [Figure 22: Global Features](#).

**Note:** *Citizen Access only supports Accela GIS (Silverlight version). You must perform additional configuration tasks to properly implement Accela GIS (Silverlight version) and Internationalization features. For complete configuration information, refer to the Civic Platform GIS Administrator Guide. For internationalization, refer to the Civic Platform Internationalization Installation and Administrator Guide.*

**Figure 22: Global Features**

## Topics

- [Account Settings](#)
- [GIS Settings](#)
- [Internationalization Settings](#)
- [FEIN Mask Settings](#)
- [Accessibility Setting](#)
- [License State Setting](#)
- [Announcement Setting](#)
- [Contact Settings](#)

## Account Settings

Public users can click the Account Management link in the ACA website to manage their account information. You can decide on whether public users can perform the following tasks when managing their accounts.

- **Manual Contact Association.** If you mark this check box, the Add a Contact button displays in the Contact Information section of the Account Management page. Public users can click the button to add more contacts to their accounts.

- Automatically Activate New Association. To activate the association of a newly-added contact with an account as soon as the public user adds the contact, you can mark the Automatically Activate New Association check box. To suspend the activation until the agency administrator approves it in the Civic Platform Public User portlet, unmark the check box.

Enable Contact Address Maintenance. If you mark this check box, when public users click a contact in the Account Management page to edit the contact details, an Add Additional Contact Address button is available for users to add more contact addresses, and the Actions menu provides menu items such as Deactivate and Edit. You can control the availability of menu items in the Actions menu in [Contact Settings on page 65](#).

**Note:** The setting on this option works only when the Standard Choice ENABLE CONTACT ADDRESS is set to Yes.

## Contact Address List

	Status	Start Date	End Date	Action
	Inactive	12/14/2012	12/16/2012	
	Active			<a href="#">Edit</a>
	Active			<a href="#">Deactivate</a>
< Prev <a href="#">1</a> <a href="#">2</a> <a href="#">3</a> <a href="#">4</a> <a href="#">5</a> <a href="#">6</a> <a href="#">7</a> <a href="#">8</a> <a href="#">9</a> <a href="#">10</a> ... <a href="#">Next &gt;</a>				
!!!				
<a href="#">Add Contact Address</a>				

- **Enable People Attachments.** If you mark this check box, the Attachments section displays in the Account Management page. Licensed professional users can manage the attachments to their account.

Name	Type	Size	Entity	Entity Type	Document Status	Status Date	Upload Date	Latest Up
No records found.								
<input type="button" value="Browse"/>	<input type="text"/>	<input type="button" value="!!!"/>						

- Because each attachment uploaded by licensed professional users may be associated to one document type and one license, you may configure the Standard Choice Licensed Professional Type. For more information on setting up Standard Choices, refer to the Accela Civic Platform Configuration Reference.
- Users can click the View People Attachments link in the Attachments section on the Record Details page of the records that associate with the licensed professional to access the people attachments of a licensed professional. Users' permission to people attachments are granted in the same way as to record attachments. See [Defining Public User Permissions for Attachments on page 335](#).

## GIS Settings

**Note:** Citizen Access only supports Accela GIS (Silverlight version). You must perform additional configuration tasks to properly implement Accela GIS (Silverlight version) features. For complete configuration information, refer to the Civic Platform GIS Administrator Guide.

If your agency uses Accela GIS (Silverlight version), you can enable public users to access the map control directly from Citizen Access. You can also designate a GIS server URL for use in Citizen Access.

Your agency GIS administrator determines which map functions commands are available to public users. For more information, refer to the *Civic Platform GIS Administrator Guide*.

If you plan to use Bing maps in Accela GIS (Silverlight version), configure the default country in the Standard Choice Value ACA\_DEFAULT\_COUNTRY in the Standard Choice ACA\_CONFIGS. Once defined, Bing Maps automatically uses the default country when public users search for an address without specifying a country.

### Topics

- [Activating GIS Map Control](#)
- [Setting the GIS Server URL \(legacy version\)](#)
- [Enabling the Document Type Filter](#)
- [Configuring Pages Related to GIS Functionality](#)

### Activating GIS Map Control

Select the Activate GIS Map Control check box to enable public users to access the Accela GIS (Silverlight version) map control from Citizen Access.

**Note:** Even when the GIS map control is activated, there are separate settings for each module to display the map in Citizen Access. See [Maps on page 104](#).

## Setting the GIS Server URL (legacy version)

To enable the legacy Silverlight version of Accela GIS, enter the URL for the Accela GIS server. For example, <https://arcgis-server/agis/>.

## Setting the Civic Platform GIS (JavaScript version)

To configure Civic Platform GIS (JavaScript version) on the Citizen Access Administration site, under **GIS Settings**, enter the following required fields:

<b>Set the GIS Server URL</b>	The Accela GIS (Silverlight version) server URL. For example: <a href="https://myagency.com/agissl">https://myagency.com/agissl</a>
	<b>Note:</b> The <b>Set the GIS Server URL</b> field for the Accela GIS (Silverlight) version is also required to support other maps in Citizen Access that still use the legacy Accela GIS (Silverlight) version.
<b>GIS Service Url (JavaScript version)</b>	The Civic Platform GIS (JavaScript version) server URL. For example: <a href="https://myagency.com/agis/api">https://myagency.com/agis/api</a>
<b>GIS Service ID</b>	This GIS Service ID defined for the Citizen Access integration on the Civic Platform GIS Administration site.
<b>GIS Group</b>	The user group setting to be used with the specified GIS Service integration. "Default" is the default user group if no specific group has been configured.

## Enabling the Document Type Filter

Select the Enable Document Type Filter check box to enable public users to view the associated documents of a parcel through GIS map in Citizen Access.

This setting takes effect only when the Show Documents map command is enabled in Accela GIS (Silverlight version). For detailed information on how to configure the map command, see the *Accela Civic Platform GIS Administrator Guide*.

## Configuring Pages Related to GIS Functionality

You can configure the following two pages to show records and documents via GIS maps in Citizen Access. For information on how to customize a web page, see [Chapter 10: Working with Web Pages on page 160](#).

- Show Record Dialog

- Show Geo Docs Dialog

In this page, you can mark the check box of **Include historical documents** to allow public users to view a full listing of documents associated with the current parcel or the historical parcels that, by splitting or merging from the root downward, eventually generate the current parcel. If you clear the check box, only the documents that relates to the current parcel are viewable. You can also mark the check box of **Select All** to allow public users to view the associated documents of any document type.

## Internationalization Settings

You can enable internationalization so your agency can provide a website in multiple languages. Mark the Enable Internationalization check box to provide additional fields for localizing your website. You can activate additional fields for phone numbers and addresses. For example, you can display the country code field for a phone number on the Registration, Contact, and Licensed Professional Web pages. This feature requires pre-configuration setup. For complete instructions to implement internationalization on your ACA website, refer to the *Accela Civic Platform Internationalization Installation and Administrator Guide*.

## FEIN Mask Settings

Mark the Enable FEIN Mask check box to apply the mask defined in the Standard Choice MASKS for Federal Employer Identification Numbers (FEIN). For a better understanding of the FEIN mask, see the Standard Choice MASKS and the FID-8464: SSN and FEIN Mask in the *Accela Civic Platform Configuration Reference*.

For information on configuring the FEIN field validation, see [Setting SSN and FEIN Contact Field Validation on page 241](#).

## Accessibility Setting

You can enable accessibility mode so your agency can provide a website that supports assistive technology. To configure this, you must mark the Display Accessibility Switch check box in the Global Features section.

After that, Citizen Access provides an alternate user interface mode that enables users with screen readers (such as JAWS or Window-Eyes) to use your website application more effectively. Public users can mark the Accessibility Support check box at the top of the Citizen Access Home page. See [Figure 23: Accessibility Support Check Box for Public User](#).

**Figure 23: Accessibility Support Check Box for Public User**



The accessibility mode includes the full functionality of Citizen Access Web pages with slight modifications designed to create a better user experience for users with some disabilities or impairments, particularly those who are blind. For a summary of the Web page areas that behave significantly different for users who have accessibility mode enabled, see the *Accela Civic Platform Accessibility Administrator and User Guide*.

Most browsers support jumping to specific links by typing keys defined on the website. For example, on Windows, you can press ALT + an access key; on Macintosh, you can press Control + an access key.

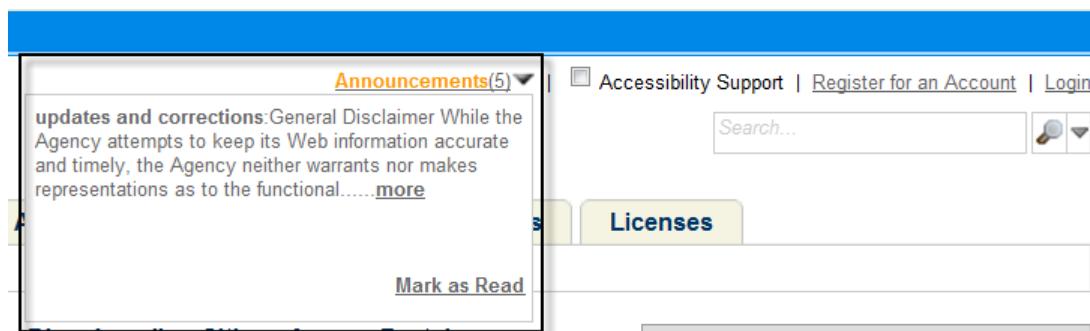
## License State Setting

You can mark the Display License State check box to display the two-letter abbreviation for the state where the license is issued as a prefix to the license number; for example, AK-10-SMPL-00001, where AK is abbreviation for the state of Alaska, and 10-SMPL-00001 is the license number. To hide the state prefix from public users, clear the check box.

## Announcement Setting

You can enable the Announcement functionality by marking the check box ahead of Enable Announcements, and define how often should Citizen Access refresh the announcement by entering a positive integer into the text box for the “Refresh Announcement every minutes” item. After the configuration, Citizen Access provides an Announcement link on the top of the home page. See [Figure 24: Announcements Link and the Latest Published Announcement](#). Users can click the link to view a list of announcements.

**Figure 24: Announcements Link and the Latest Published Announcement**



To enable posting a specific announcement to Citizen Access, administrator must go to Civic Platform, create a message (announcement), set the message to be viewable by Citizen Access, and determine who should receive it. For detailed information on how to do this, see the Announcements section of the *Accela Civic Platform Administrator Guide*. When a message is disseminated to Citizen Access, it displays in a small pop-up window immediately under the Announcement link. Public users can click the More link to view the full content of the announcement. The message displays in the pop-up window until the public user clicks the Mark as Read link.

The messages, including messages marked as read, continue to be available in the announcement list until the designated end date. Public users can click the **Announcements**

Link to get a list of announcements. You can configure the **Announcement List** page in the **Page** panel in **General** to adjust the view to suit your agency's need.

## Contact Settings

The Contact Settings determines whether public users can edit or deactivate contact address during the registration, account management, or application page flow. The Contact Settings consists of the two options below.

- Enable Contact Address Modification. Mark the Enable Contact Address Modification check box to enable the Edit menu item under the Actions menu at each active contact address. Public users can click the Edit item to edit a contact address in their accounts or applications.  
If you want to hide the Edit menu item, unmark the Enable Contact Address Modification check box.
- Enable Contact Address Deactivation. Mark the Enable Contact Address Deactivation check box to enable the Deactivate menu item under the Actions menu at each active contact address. Public users can click the Deactivate menu item to deactivate a contact address in their accounts or applications.  
If you want to hide the Deactivate menu item, clear the Enable Contact Address Deactivation check box.

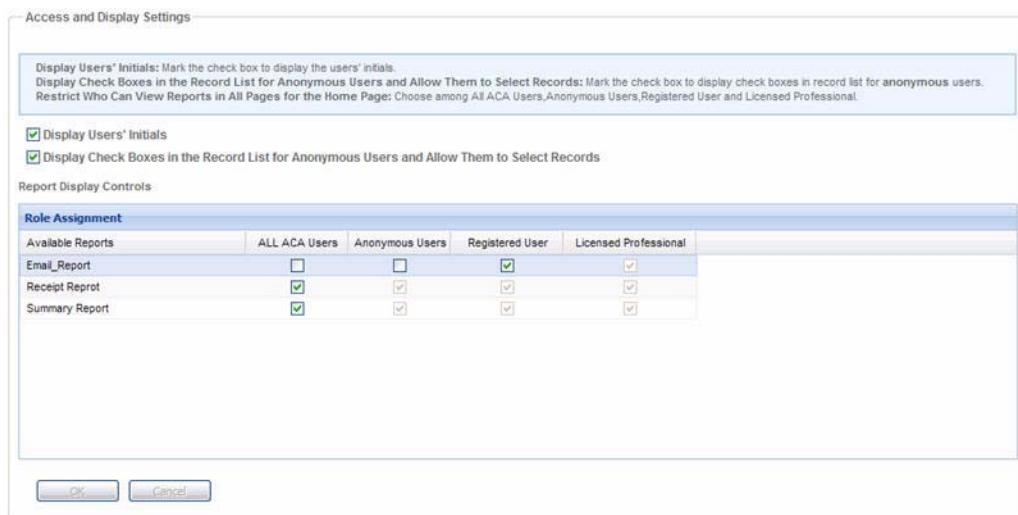
Public users can always add contact addresses in an application page flow regardless of the settings. The Enable Contact Address Maintenance under [Account Settings on page 59](#) determines whether public users can add contact addresses in account management.

You can configure the Standard Choice Value DEFAULT\_CONTACT\_ADDRESS\_TYPE in ACA\_CONFIGS. In the value description of DEFAULT\_CONTACT\_ADDRESS\_TYPE, you can specify the default contact address type for all the Contact Address sections in the Citizen Access website.

## Access and Display Settings

The Access and Display Settings section provides the options to grant access or define display settings for your website. It also provides a brief overview of the features and provides additional information to complete the feature configuration requirements. See [Figure 25: Access and Display Settings](#).

**Note:** *You may need to perform additional configuration tasks to properly implement the access and display setting features. For complete configuration information, refer to [Chapter 4: Global Settings Configuration Page on page 57](#) and [Chapter 20: Reporting Information on page 472](#).*

**Figure 25: Access and Display Settings**

## Topics

- [Displaying Users' Initials](#)
- [Allowing Anonymous Users to Select Records](#)
- [Report Display Controls](#)

## Displaying Users' Initials

Mark the Display Users' Initials check box when you want to set the users' initials to display by default on web pages in Citizen Access. The initials come from the User Profile settings for an agency user. For complete configuration information, see [Defining Agency Employee Display Settings on page 49](#).

## Allowing Anonymous Users to Select Records

You can mark this check box to allow a non-registered public user to select records from a record list. This can be useful if your agency does not require registration for a particular application. For example, a fishing license. If an anonymous user completes multiple fishing license applications for their family members during their session, then the completed records can show up in their records list where they can be selected, grouped in a collection, or added to a shopping cart where the fees associated with the licenses can be paid for in one transaction. This check box is clear by default.

## Report Display Controls

You can set who can view reports on the report list link at login. Define which types of users have permissions to view available reports assigned to the ACA Report list from the Home page by indicating user type permissions in the Report Display Controls area. For a description of

user types, see [Defining Permissions for the Home Page Report List on page 481](#). For more information about reporting, see [Setting Report Viewable Permissions on page 481](#).

## Search Settings

Common search pages on the Citizen Access website provide a set of search fields for users to enter the search criteria, a Search button to start the search, and a Clear button to reset the search page to its original state.

The Search Settings section of the Global Setting page allows you to define some of the search functionality for your website including: Global Search, Cross Module Search, Contact and Licensed Professional Search, and Address Range search. This section also provides the configuration to allow data export of search results in CSV format. For an illustration of the settings on this page, see [Figure 26: Search Settings](#).

**Note:** *You need to perform additional configuration tasks to properly implement the global search or additional search features. For complete configuration information, refer to [Chapter 13: Configuring Record Inquiry on page 243](#).*

**Figure 26: Search Settings**

The screenshot shows the 'Search Settings' configuration page. At the top, there is a summary of global search settings with descriptions for each option. Below this, there are three main sections: 'Global Search', 'People Search', and 'Additional Settings'. Each section contains several configuration options with checkboxes and some have 'Configure' buttons.

**Global Search:** Mark the check box to enable Global Search. User will be able to search records, licensed professionals and property information globally across all Modules.

**Allow Search Groups:** Mark the check boxes to include which search groups can be searched by public user.

**People Search:** Mark the check boxes to enable contact and/or licensed professional searches during application. Click the Configure button to configure which types of contacts and licensed professional are applicable for searches.

**Enable Cross Module Search:** Mark the check box to enable cross module search.

**Enable Address Range Search:** Mark the check box to enable search by address range.

**Restrict Licensed Professional Results to Only Those Associated with the User:** Mark the check box to only include licensed professionals associated with current public user in search results.

**Allow Public Users to Export Search Results (in the CSV Format):** Mark the check box to allow public users to export the search result list in the CSV format.

**Global Search**

Enable Global Search

Allow Search Groups:  Records     Licensed Professionals     Property Information

**People Search**

Enable Contact Search    [Configure](#)

Enable Licensed Professional Search    [Configure](#)

**Additional Settings**

Enable Cross Module Search

Enable Address Range Search

Restrict Licensed Professional Results to Only Those Associated with the User

Allow Public Users to Export Search Results (in the CSV Format)

### Topics

- [Global Search](#)
- [People Search](#)
- [Additional Settings](#)

## Global Search

You can activate the global search feature by marking the Enable Global Search check box. Then, indicate which groups you want to allow the public user to search by marking the check box next to the Records, Licensed Professionals, and/or Property Information. Citizen Access scans the groups that you choose to enable for Searches to populate a matched result list. Similar to the global search feature in Civic Platform, this feature allows public users to enter search criteria and search for information across modules for any record on any Web page. For example, a public user can enter at least three characters in the search window and Citizen Access returns data elements meeting this criteria, such as records or addresses. Citizen Access retains the five latest searches by key word in a Recent Search drop-down list, which are accessible by clicking the drop-down arrow next to the search window. For more information about Global Search including the additional configurations, see [Enabling Global Search on page 244](#).

## People Search

This section provides options for you to restrict searching reference data of Contact and Licensed Professional during the application process.

### Topics

- [Enabling Contact Search](#)
- [Enabling Licensed Professional Search](#)

### Enabling Contact Search

Mark the check box to turn on the Look Up functionality for the Contact and the Contact List sections in the application intake form. With the Look Up functionality, public users can search the contact reference data and populate the search result to the Contact or Contact List section.

After you enable contact search, you can click the Configure button to select the contact types to be available in the Look Up Contact window.

**Note:** *To display the Look Up button in the Contact and the Contact List sections, you must also set the Data Source property of their components in the page flows to either Reference or No Limitation. For detailed information about Data Source, see [Table 6: Components Setting Attributes on page 153](#).*

### Enabling Licensed Professional Search

Mark the check box to enable the Look Up functionality for the Licensed Professional and the Licensed Professional List sections. With the Look Up functionality, public users can search the licensed professional reference data and populate the search result to the Licensed Professional or the Licensed Professional List section.

After you enable licensed professional search, you can click the Configure button to select the licensed professional types to be available in the Look Up License window.

**Note:** *To display the Look Up button in the Licensed Professional and the Licensed Professional List sections, you must also set the Data Source property of their components in the page flows to either Reference or No Limitation. For detailed information about Data Source, see [Table 6: Components Setting Attributes on page 153](#).*

## Additional Settings

You can customize search functionality to accommodate the demands of your agency. The Additional Settings section provides options to Enable Cross Module Search, Enable Address Range Search, Restrict Licensed Professional Search Results to Only Those Associated with the User, and Allowing Public Users to export search result data. For more information about these additional search settings and associated configurations, see [Chapter 13: Configuring Record Inquiry on page 243](#).

## Topics

- [Enabling Cross Module Search](#)
- [Enabling Address Range Search](#)
- [Restricting Licensed Professional Search Results to Only Those Associated with the User](#)
- [Allowing Public Users to Export Search Results in CSV Format](#)

## Enabling Cross Module Search

Mark the check box to enable the Cross Module Search feature for the module and then define which additional modules you want to include. For more information about Cross Module Search and how to configure full functionality, see [Configuring Cross Module Searches on page 248](#).

## Enabling Address Range Search

Mark the check box to enable the Address Range Search functionality. For more information about address range searches and configurations, see [Enabling Address Range Search Functionality on page 250](#).

## Restricting Licensed Professional Search Results to Only Those Associated with the User

Mark the check box to limit the licensed professional search results to only those licenses associated with the current user. For more information about licensed professional search restrictions and configurations, see [Defining Licensed Professional Searches on page 254](#).

## Allowing Public Users to Export Search Results in CSV Format

Mark the check box to allow users to export search results in CSV format, such as an excel spreadsheet. For more information about exporting search results, see [Exporting Search Results in CSV Format on page 282](#).

## Fees and Check-out

The Fees and Check Out section provides configurations surrounding Fees and Online Payments, including enabling decimals points. It also provides some of the Shopping Cart configurations. See [Figure 27: Fees and Check-out](#). The Cart Settings support a feature that allows public users to group records together and pay for associated fees in one transaction.

**Note:** You need to perform additional configuration tasks to implement the features for fees and check out. For complete configuration information about online payments, refer to both the "Payment Processing" chapter in the Accela Civic Platform Administrator Guide and the integration package EPay SDK.zip. Contact Accela Customer Support for assistance in obtaining the integration package. See also, [Chapter 15: Fees and Online Payments on page 358](#).

**Figure 27: Fees and Check-out**

Online Payments: Mark the checkbox to enable Online Payment processing.  
Fee Estimate Scripts: The EMSE script selected will fire during the Fee Estimate process. The script will run after the user selects predefined ASI in the Fee Estimate process.  
Enable Cart: Mark the check box to enable the cart.  
Payment Transaction Settings: Select the option to configure if the payment transaction bases on records or the cart.  
Set Expiration Days for Selected Items: Enter a number to indicate how many days records can be held in the Selected Items area of the cart.  
Set Expiration Days for Saved Items: Enter a number to indicate how many days records can be held in the Saved Items area of the cart.

Enable Online Payment  
 Enable Decimal

Select script to run before the Fee Estimate page:  
--Select--

Cart Settings  
 Enable Cart  
Payment Transaction Settings: Transaction per Record  
Set expiration days for Selected Items: 30  
Set expiration days for Saved Items: 30

### Topics

- [Enabling Online Payment](#)
- [Selecting the Script to Run before the Fee Estimate Page](#)
- [Cart Settings](#)

## Enabling Online Payment

Your agency must enable online payment processing if you want to allow public users to pay for their fees online. Mark the check box to activate online payments. Verify the pre-configuration tasks are complete.

Refer to both the “Payment Processing” chapter in the *Accela Civic Platform Administrator Guide* and the integration package *EPay SDK.zip*. Accela Customer Support for assistance in obtaining the integration package. See also [Configuring Shopping Cart on page 377](#)

## Selecting the Script to Run before the Fee Estimate Page

This section provides the ability to enable a script to run during the Fee Estimation phase of the application process. Select the FEEESTIMATEAFTER4ACASCRPT from the drop-down list. This script is designed to identify applicable conditions flagged to display on the Fee Estimate Page for the application. For more information on how to configure conditions to display on the Fee Estimate page, refer to [Displaying Conditions on page 314](#).

## Cart Settings

Your agency can provide a shopping cart feature to allow public users to group records or group other items in one location and pay for all items at the conclusion of the session. See [Figure 101: Shopping Cart Details](#). This step in the Cart setup defines payment transaction options and expiration settings. This is also the section where you enable the Shopping Cart feature. For

complete configuration information and implementation of the shopping cart, see [Configuring Shopping Cart on page 377](#).

## Topics

- [Enabling Cart](#)
- [Configuring Payment Transaction Settings](#)
- [Setting Expiration Days for Selected Items](#)
- [Setting Expiration Days for Saved Items](#)

## Enabling Cart

Mark the check box to enable the Shopping Cart feature for your website. For additional information about the Shopping Cart and complete configuration information about implementation, see [Configuring Shopping Cart on page 377](#).

## Configuring Payment Transaction Settings

The payment transaction settings define how Citizen Access generates receipts and bill the customer for items placed in the cart. The two options are Transaction per Shopping Cart and Transaction per Record Type. Review the descriptions provided in each section described below.

### Transaction Per Shopping Cart

This is the default setting which generates one receipt number for the entire shopping cart. You can choose this option if your agency supports online payments or API payments.

When your agency implements multiple agency functionality and you choose this default setting, then Citizen Access generates a receipt for each agency per shopping cart. Citizen Access supports API payments in this environment. And it also supports online payments across multiple agencies through a custom payment adapter, instead of a build-in online payment adapter.

### Transaction Per Record Type

Generates a receipt number for each record type in the shopping cart.

## Setting Expiration Days for Selected Items

Enter a number to define the number of days items can remain in the shopping cart Selected area. Once the expiration day arrives, ACA removes the record from the Selected Items area.

## Setting Expiration Days for Saved Items

Set expiration days for Saved Items. Enter a number to define the number of days items can remain in the shopping cart Saved area. Once the expiration day arrives, ACA removes the record from the Saved Items area.

## Delegates Settings

This Delegates Settings section provides configurations to enable delegate functionality, set the number of expiration days for the delegate invitations, and set the number of purge days for the expired or declined invitations. See [Figure 28: Delegates Settings](#).

**Figure 28: Delegates Settings**

The screenshot shows a configuration page titled "Delegates Settings". It contains three informational text boxes at the top: "Delegates: Mark the check box to enable public user as the delegate to work on behalf of the public user.", "Set expiration days for delegate invitations: Enter a number to indicate how many days delegate invitation can stay active before it is expired.", and "Set purge days for expired and declined invitations: Enter a number to indicate how many days the expired and declined invitations can be stored in database before they are purged.". Below these are three input fields: "Enable Delegates" (checkbox checked), "Set expiration days for delegate invitations: 10", and "Set purge days for expired and declined invitations: 10".

The delegate functionality allows public users to designate other public users as their delegates and grant delegates permissions to access their data. Delegates can work on the data based on the granted permissions, such as viewing records, scheduling inspections, creating, renewing and amending records, uploading, downloading and deleting documents and making payment.

**Note:** You need to perform additional configuration tasks to properly implement the features for delegate functionality. See [Managing Delegates on page 45](#) in [Managing Delegates](#) for complete configuration information.

### Topics

- [Enabling Delegates](#)
- [Setting Expiration Days for Delegate Invitations](#)
- [Setting Purge Days for Expired and Declined Invitations](#)

## Enabling Delegates

You can enable the delegate functionality to allow public users to designate other public users as their delegates. Delegates work on the public users' data based on the granted permissions.

Mark the Enable Delegates check box in the Delegates Settings section to enable the delegate functionality.

With the delegate functionality enabled, the Delegates section displays in the Account Management page in public user's account. See [Figure 29: Delegates Section in Account Management Page](#). Public users can designate other public users to be their delegates by clicking the "Add a delegate" link, completing the Add a Delegate form and submitting it. In response, Citizen Access sends an e-mail to public users notifying them that they are invited to be delegates. Meanwhile, an invitation is appended to the invited public users' Delegates section.

**Figure 29: Delegates Section in Account Management Page**

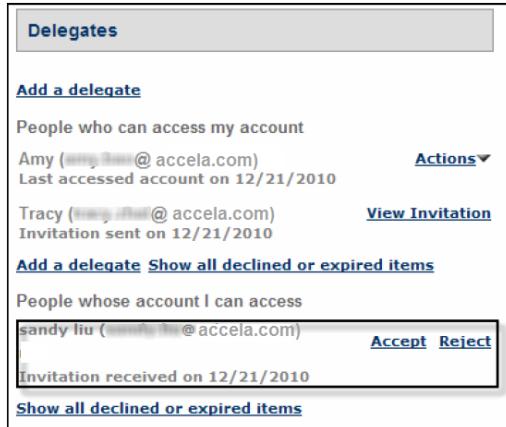
The screenshot shows the 'Manage Your Account' page. At the top, it says 'Manage Your Account' and provides instructions: 'Your current account information is shown below. Click an Edit button to update information within a section.' Below this is the 'Account Type' section, which displays 'Citizen Account'. The page is divided into two main sections: 'Login Information' and 'Contact Information', each with an 'Edit' button. Under 'Login Information', the user name is peggy.huang, e-mail is peggy.huang@hotmail.com, and password is \*\*\*\*\*. Under 'Contact Information', the title is pegg Peggy Yan Huang, account is Account of Peggy, and preferred method of contact is E-mail. It also lists home phone (138-001-3800), work phone (100-861-0086), mobile phone (075-586-1978), and fax (075-526-1398). The 'Trust Account Information' section shows 'Showing 0-0 of 0' and a table with columns: Balance, Account ID, Action, Description, Status, and Ledger Account. A message states 'No records found.' The 'License Information' section contains a note about adding professional licenses and an 'Add a License' button. The 'Delegates' section, highlighted with a black border, contains the following information:

Delegates	
45646565	
<u>Add a delegate</u>	
People who can access my account	
<u>Add a delegate</u>	
People whose account I can access	
None	

## Setting Expiration Days for Delegate Invitations

When a public user receives a delegate invitation, he can accept or reject it. If a public user does not accept or reject the invitation within a number of days, it expires. The expired invitations are invisible on the Account Management page unless public users click "Show all declined or expired items" link to display them. See [Figure 30: Showing Declined or Expired Invitations](#). Public users still have a chance to accept a declined or expired invitations before the invitation reach the purge day.

Enter a number to define the number of days that an invitation can display in the Delegate section before it hides. Once the invitation reaches the expiration day, it expires and hides from Delegate section automatically.

**Figure 30: Showing Declined or Expired Invitations**

## Setting Purge Days for Expired and Declined Invitations

The expired or declined invitations remain in public users' account for a number of days. However they hide from the Account Management page unless public users click the "Show all declined or expired items" link to display them. See [Figure 30: Showing Declined or Expired Invitations](#). Public users still have to accept a declined or expired invitations before the they reach the purge day. When the purge day arrives, the invitations are purged from the public users' account.

Enter a number to define the number of days that the expired or declined invitations can remain in public users' account. Once the purge day arrives, the expired or declined invitations are purged from the public users' account.

## Parcel Genealogy Settings

The Parcel Genealogy Settings section provides the option to enable the Parcel Genealogy feature. Mark the Enable Parcel Genealogy check box to enable this feature. See [Figure 31: Parcel Genealogy Settings](#).

The Parcel Genealogy feature allows public users to access the Genealogy History and Genealogy Children sections in Citizen Access. See [Figure 32: Genealogy History and Genealogy Children](#) for a visual example of the Genealogy History and Genealogy Children sections on the Parcel Detail web page in Citizen Access Setup. From the Genealogy History section, public users can access all the historical records for the parcel, including its parents, grandparents, and ancestors. From the Genealogy Children section, public users can review only one generation of children parcels.

**Figure 31: Parcel Genealogy Settings**

The screenshot shows a configuration page titled "Parcel Genealogy Settings". It contains a single input field labeled "Display Parcel Genealogy: Mark the check box to display parcel genealogy on the Parcel Details page." Below this is a checkbox labeled "Enable Parcel Genealogy".

**Figure 32: Genealogy History and Genealogy Children**

The screenshot displays two tables under the "Genealogy History" and "Genealogy Children" sections. Both sections show "Showing 0-0 of 0" results. The first table has columns: Date, Description, Children, Action, and Parents. The second table has columns: Date, Description, Parents, Action, and Children.

Date	Description	Children	Action	Parents
<b>Genealogy History</b>				
Showing 0-0 of 0				
<b>Genealogy Children</b>				
Showing 0-0 of 0				

---

## Examination Setting

The Examination Setting section provides the option for you to define whether allow examination providers to update Examination scores by uploading CSV score files. See [Figure 33: Examination Setting](#).

If the check box of Enable Auto-update Examination by CSV is marked, when Examination providers upload Examination score file, the associated Examination records are updated on the Examination Scores. For more information about Examination, see [Configuring Examinations on page 462](#).

**Figure 33: Examination Setting**

The screenshot shows a configuration page titled "Examination Setting". It contains a single input field labeled "Auto-update Examination by CSV: Mark the check box to enable the function to update examination automatically by uploading CSV." Below this is a checked checkbox labeled "Enable Auto-update Examination by CSV".

## Enabling the Education, Continuing Education, and Examination Sections

A public user can enter education, continuing education, and/or examination data as part of the application process and have that data become a part of his user account data so that he can update it and re-use it for other applications. He can also enter this data apart from the application process. After the public user submits the data, it synchronizes with Civic Platform, where an authorized Civic Platform user can review and approve the education, continuing education, and/or examination records. This approval 'validates' the education, continuing

education, and/or exam records and this validation syncs back to the public user's account, where it is available for future applications.

**To enable public user interaction with education, continuing education, and examination data for their own account**

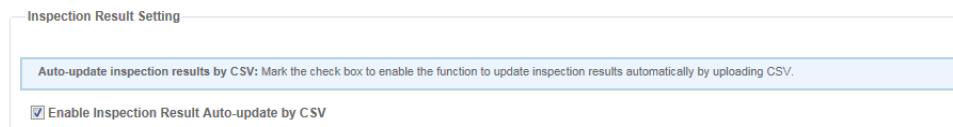
1. Open the ACA Admin window, and navigate to the Global Settings page.
2. Mark the **Enable User Entry of Education, Examination, and Continuing Education** option.
3. Click **Save**.

Agencies can customize each of the three sections via the generic page customization function.

## Inspection Result Setting

The Inspection Result Setting section provides the option for you to decide whether it is necessary to review the inspection result CSV file from an external inspector before the inspection results get updated. See [Figure 34: Inspection Result Setting on page 77](#) for a visual example of the Inspection Result Setting section.

**Figure 34: Inspection Result Setting**



When you select Enable Inspection Result Auto-update by CSV, Citizen Access updates the inspection results immediately after the inspector uploads the inspection result CSV file through the Resulted Inspections section (see [Figure 35: Upload Inspection Results Page on page 78](#)).

When you clear Enable Inspection Result Auto-update by CSV, Citizen Access attaches the inspection result CSV file that the inspector uploads through the Resulted Inspections section to the licensed professional associated with the inspector. Your agency can use a script with the EMSE event *DocumentUploadAfter* to notify agency employees of reviewing the CSV file. Civic Platform lists the CSV file on the Documents tab for the licensed professional. Agency employees can click the Result Inspections button to have Civic Platform update the inspection results per the file. When the update process is complete, Citizen Access displays an announcement to the inspector. For more information, see "Managing Attachments Associated with Professional" in the Contacts and Licensed Professional chapter of the *Accela Civic Platform User Guide*.

Figure 35: Upload Inspection Results Page

The screenshot shows a web-based administrative interface for managing inspection results. It features three main sections:

- New Inspections:** Shows a list of scheduled inspections. The columns include Inspection Type, Address1, Record ID, Status, and Scheduled Date. All entries are for 'Audit Inspection' at '98 Sun set RNCH S, San Ramon NY United States, 3' with a record ID of '13CAP-00000063' and a scheduled date of '08/23/2013'. Navigation links at the bottom allow for page navigation.
- Resulted Inspections:** Shows a list of approved inspections. The columns include Inspection Type, Status, Inspection Date2, Address3, and Record. Examples include '009 Combo 810\_389 Approved 08/20/2013 13CAP-0' and '010 Combo 135\_877\_589 Approved 08/20/2013 13CAP-0'. Navigation links at the bottom allow for page navigation.
- Log File:** Shows a list of log files. The columns include Log File Name and Log Time. Examples include 'NewInspectionList20130906\_log\_20130907020043.csv' at 9/7/2013 2:00:43 AM and '0902\_log.csv' at 9/2/2013 3:52:33 AM. Navigation links at the bottom allow for page navigation.

Each section includes a 'Download results' link and a 'Click here to [action]' link (e.g., 'Click here to upload inspection results').

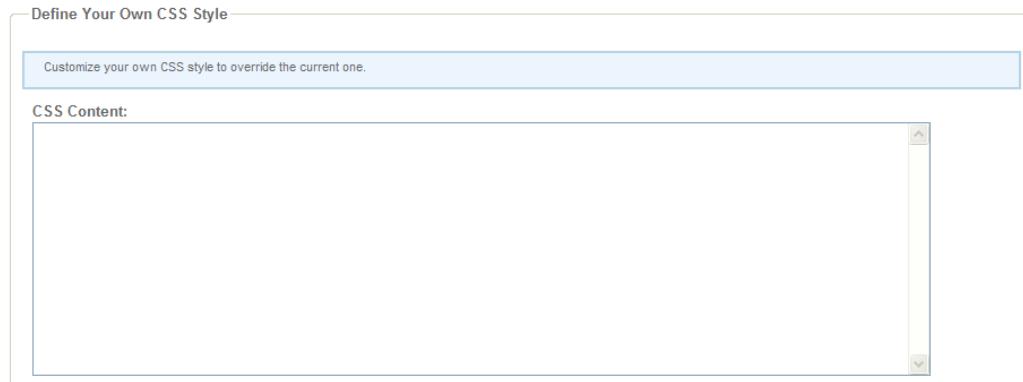
## Defining Your Own CSS Style

You can change the look and feel of elements on any pages in Citizen Access. There are two possible approaches to take:

- Create and apply a custom CSS stylesheet and/or javascript file to a page. For instructions, see [Configuring URLs and Deep Links to Citizen Access Pages on page 194](#).
- Directly create your own Cascading Style Sheet (CSS) in ACA Admin. See [Figure 36: Defining Your Own CSS Style](#). You can modify any CSS controllable display. For example, you can change the background color, choose a different text font, or resize tables. The CSS code you can modify is based on the source code you see when you invoke the View

Source command from your browser. For an example that walks you through changing the appearance of an element, see [Updating the Title Bar on page 79](#).

**Figure 36: Defining Your Own CSS Style**



## Updating the Title Bar

You can modify any CSS controllable display for Citizen Access. This section shows you how to modify the appearance of the Citizen Access title bar.

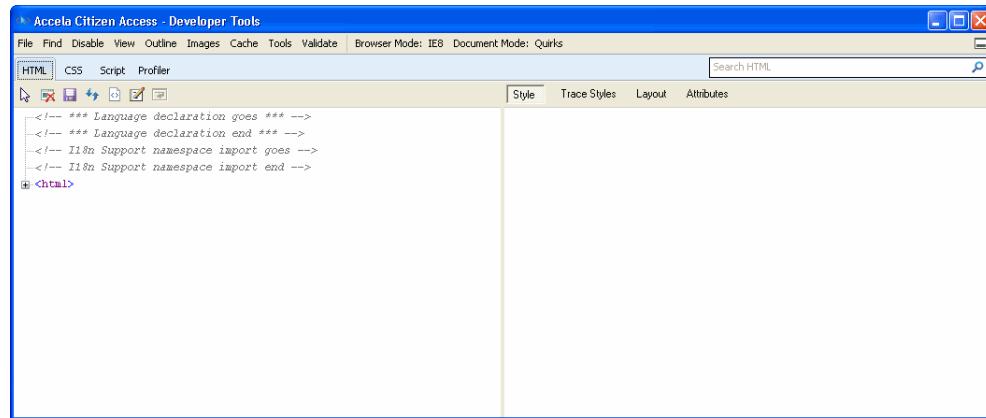
**Note:** *The following example assumes the Internet Explorer 8 is being used to access the Citizen Access. If you are using a different browser, you may need to adjust your workflow to accommodate your browser. To learn how to use the Developer Tools, please visit [http://msdn.microsoft.com/en-us/library/dd565626\(VS.85\).aspx](http://msdn.microsoft.com/en-us/library/dd565626(VS.85).aspx).*

### To update the title bar

1. Access the Login page of Citizen Access with Internet Explorer 8.
2. Log in to the Citizen Access as a public user.
3. Access page that contains a title bar, such as Record List page.

4. Press **F12** on your keyboard.

*The Developer Tools window displays.*



5. Select element by Click button (button resembles a mouse pointer) in the Developer Tools or press **Ctrl + B** on your keyboard.
6. Return to the browser window where you have Citizen Access open.
7. Move your mouse cursor to the element you are modifying - in this case, the title bar. As you move your mouse, notice that a blue box appears over elements you are passing. When the blue box is enveloping the whole title bar for the page, click once.

*The left side of the Developer Tools window automatically scrolls to and highlights the corresponding HTML for the selected element; while the right side displays the CSS code for the element.*

The screenshot shows the Accela Citizen Access application interface with a title bar labeled "Residents" and "Visitors". Below the title bar is a navigation menu with tabs: Home, Building, Planning, Fire, Public Works, and AMS. A sub-menu "Records" is open under the Home tab. At the bottom of the screen, there is a toolbar with buttons for "Create an Application", "Obtain a Fee Estimate", "Search Applications", and "Schedule an Inspection".

Overlaid on the bottom of the screen is the "Accela Citizen Access - Developer Tools" window. This window has its own title bar and menu bar. The main area of the developer tools window shows the HTML structure of the page. A specific element, the title bar, is highlighted with a blue selection box. On the right side of the developer tools window, the CSS styles for this selected element are displayed in a tree view. The CSS class ".ACA\_Title\_Bar" is highlighted, and its properties are listed:

- .inherited - html
- HTML
  - direction : ltr
- .inherited - body
- BODY
  - font-family : Arial, sans-serif
  - font-size : 62.5%
- .ACA\_Title\_Bar
  - border-bottom : #999999 1px solid
  - border-left : #999999 1px solid
  - padding-bottom : 8px
  - padding-left : 8px
  - padding-right : 8px
  - margin-bottom : 7px
  - background : #daddad
  - height : 1.6em
  - clear : both
  - border-top : #999999 1px solid

8. On the left side of the Developer Tools window, identify the CSS class for the title bar. In this example, it is called **.ACA\_Title\_Bar**.

9. Log in to Citizen Access Setup and navigate to the Global Settings page.
10. Scroll down to display the Define Your Own CSS section.
11. Modify your own title bar style in the CSS Content box by changing the value of any of the listed attributes. The illustration below makes changes to the background color and to the border around the title bar.

ACA\_Title\_Bar

- .ACA\_Title\_Bar
- border-bottom : #999999 1px solid
- border-left : #999999 1px solid
- padding-bottom : 8px
- padding-left : 8px
- padding-right : 8px
- margin-bottom : 7px
- background : #dddddd
- height : 1.6em
- clear : both
- border-top : #999999 1px solid
- border-right : #999999 1px solid
- padding-top : 8px

CSS Content:

```
.ACA_Title_Bar
{
    border-bottom : solid 1px #999999;
    border-left : solid 1px #999999;
    padding-bottom : 8px;
    padding-left : 8px;
    padding-right : 8px;
    margin-bottom : 7px;
    background : #rgb(200,200,255);
    height : 1.6em;
    clear : both;
    border-top : solid 1px #999999;
    border-right : solid 2px #999999;
    padding-top : 8px;
}
```

12. Click the **Save** button.
13. Click the **Clear Cache** button.
14. Return to Citizen Access and access a page that contains a title bar.

*Citizen Access displays the changes you made to the title bar.*



## CHAPTER 5: FEATURE SETTINGS PAGE

---

Enable modules and features for Citizen Access on the Feature Settings page. See [Figure 37: Feature Settings Configuration Page](#). This page is most commonly used to enable modules for Citizen Access and define login requirements to perform tasks. When a module is enabled on the Feature Settings page, ACA creates a tab on the Home page and in the navigation panel where you can configure modular settings, customize Web pages, and create a page flow for Record types. Refer to [Table 3: Feature Settings Configuration Check Boxes](#) for a complete description of Feature Setting configurations.

Expand the tree in a module to activate hyperlinks on the home page so public users can quickly go to the associated task. Continue to expand the tree to view check boxes used to enable the force login or registration feature. This means that in order to access the modular task, the public user must register with your agency website. If the user has already registered, ACA requires the public user to log in before they can perform the task.

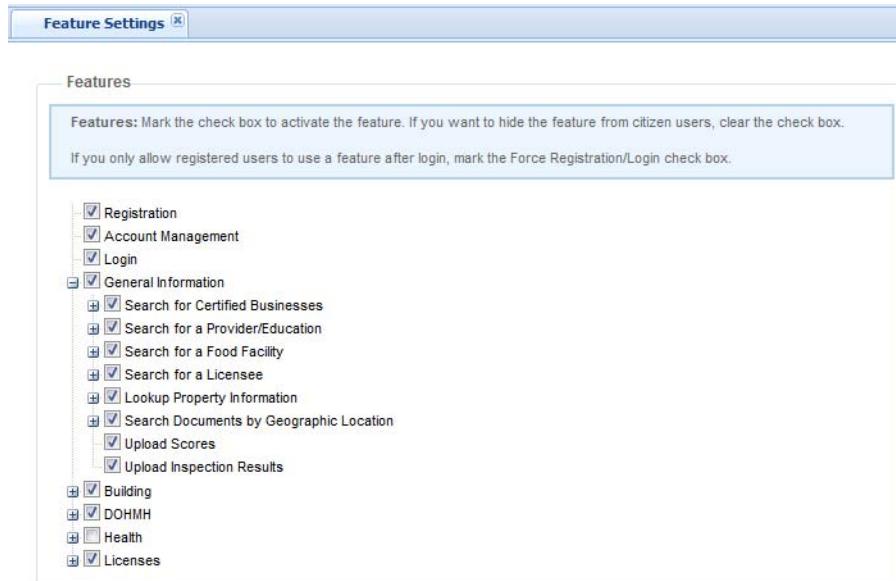
### Topics

- [Feature Setting Configurations](#)
- [Configuring Required Registration](#)
- [Configuring Service Selection for a Main Agency](#)

## Feature Setting Configurations

This section provides details for each check box configuration element on the Feature Settings page. Refer to [Table 3: Feature Settings Configuration Check Boxes](#) for a description of the check box and the effect in ACA. Refer to [Figure 37: Feature Settings Configuration Page](#) as a reference tool for the configuration check boxes.

You can provide a more prominent Login panel making it easier for public users to access ACA. You can configure the text size, color, and font of the login user ID and the links next to it, including Register for an Accounts, Collections, Shopping Cart, Reports, Account Management, Login, and Logout. Additionally, a Login box is added to the Welcome page. To configure the text size, color, and font for the login user ID and the links, navigate to the ACA Admin > General Settings > Feature Settings. For a brief summary of the Login configuration item locate it in [Table 3: Feature Settings Configuration Check Boxes](#).

**Figure 37: Feature Settings Configuration Page****Table 3: Feature Settings Configuration Check Boxes**

Configuration	Citizen Access Result
<b>Registration</b>	Marking this check box enables the Registration feature to the public user and exposes the Registration hyperlink on the Home page.
<b>Account Management</b>	Marking this check box displays the Account Management link on the Welcome Registered page so that public users can access and update their account information on the Account Management page.
<b>Login</b>	Marking this check box exposes the Login hyperlink located at the top right corner of the Welcome Global Web page. It also exposes the standard Login panel in the middle of the Welcome Global page. If this check box is not marked, then the user will not be able to log in to ACA and will only be able to search for records.
<b>General Information</b>	Marking this check box enables search functionality for certified businesses, providers, education, licensees, food facilities, attachments, and property information. It enables the Upload Scores feature, where providers can upload scores using the Citizen Access website. It also enables the Upload Inspection Results feature, where contract inspectors and self-certified inspectors can submit CSV files containing inspection results to the agency. If necessary, clear a check box to disable the feature.
<b>Search for Certified Businesses</b>	Marking this check box creates a link to search for certified businesses from the Welcome or General Information page. It also enables the Certified Businesses search form.
<b>Search for a Provider/Education</b>	Marking this check box creates a link to search for providers or education from the Welcome or General Information page. It also exposes the Search for Provider/Education section on the Record Detail page and enables the Provider/Education search form.

**Table 3: Feature Settings Configuration Check Boxes (Continued)**

<b>Configuration</b>	<b>Citizen Access Result</b>
<b>Search for a Food Facility</b>	Marking this check box creates a link to search for inspections on food facilities (licensed professionals) from the Welcome or General Information page. It also enables the Food Facility Inspection search form.
<b>Search for a Licensee</b>	Marking this check box creates a link to search for licensees from the Welcome or General Information page. It also enables the Licensee search form.
<b>Lookup Property Information</b>	Marking this check box enables the APO Lookup feature. For more information about the APO look up feature, see <a href="#">Dynamic Description Based on Address Type on page 263</a> .
<b>Search Documents by Geographic Location</b>	Marking this check box to create a link to search for attachments from the Welcome or General Information page. For more information about searching attachment through GIS map, see <a href="#">Enabling the Document Type Filter on page 62</a> .  It also enables the Search Documents by Geographic Location form.
<b>Upload Scores</b>	Marking this check box allows examination providers to upload the CSV file of scores directly from your agency's Citizen Access website.
<b>Modules</b>	Marking the check box for each module enables the module for ACA and creates a modular tab on the ACA Home Page. This check box only enables the module. You must expose Record-Types for the module in Civic Platform. Refer to <a href="#">Enabling Applications on page 348</a> .
<b>Module Tasks</b>	Marking the check boxes for any of these modular tasks exposes the tasks on the home page. The task names below reflect the default settings delivered with a new installation. You can change the task names by customizing the labels of the task links on the Welcome Registered web page.  <ul style="list-style-type: none"> <li>• Create an Application</li> <li>• Create an Application by Selecting Services</li> </ul> <p><b>Note:</b> <i>The Create an Application by Selecting Services task is only available for the main agency in the multiple-agency administration.</i></p> <ul style="list-style-type: none"> <li>• Obtain a Fee Estimate</li> <li>• Search Applications</li> <li>• Schedule an Inspection</li> </ul> <p>You can indicate if you want to require registration before performing the task. Refer to <a href="#">Configuring Required Registration on page 85</a>.</p>
<b>Single Service Selection Only</b>	Marking this check box nested under the Create an Application by Selecting Services modular task forces a user to make a single selection on the Select Services page.  This check box is only available for the main agency in the multiple-agency administration. See <a href="#">Configuring Service Selection for a Main Agency on page 85</a> .
<b>Force Registration/Login</b>	Marking this check box for a modular task forces a user to log in or register with the agency before gaining access to the task functionality.

# Configuring Required Registration

ACA provides the ability to force a user to register with your agency before they can gain access to perform a modular task. For example, the administrator configures the Permits module to require user login or registration for any Permit related task. When a public user selects to create an Application, he or she will be forced to the registration and/or login page. They either register or login and then are redirected back to Create Application task.

This feature requires you to mark or clear the Force Registration/Login check boxes for each modular task.

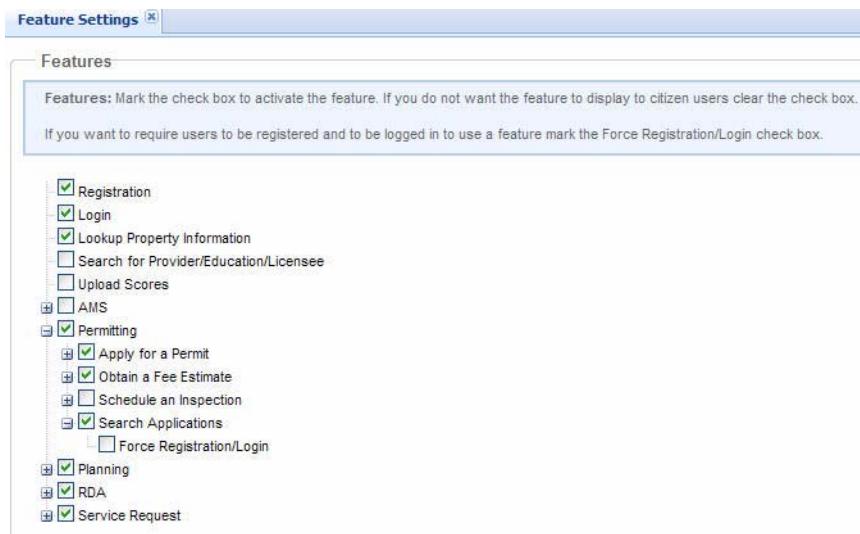
## To configure the registration required feature

1. Navigate to **General Settings > Feature Settings**.

*Citizen Access displays the Feature Settings page.*

2. Expand the navigation tree for a module.

3. Mark the check boxes next to each modular task to which you want to require registration.



4. Repeat step 2 and step 3 above for each module.

5. Click the **Save** button.

# Configuring Service Selection for a Main Agency

The multiple-agency functionality allows public users to select services provided by various sub-agencies from the main agency and create multiple applications at a time. For more information, see [Understanding the Process for Creating a Record on page 533](#).

After marking the Create an Application by Selecting Services check box in Feature Settings for the main agency in a multiple-agency environment, use the Single Service Selection Only check box to further control whether public users can select a single service or multiple services in the main agency.

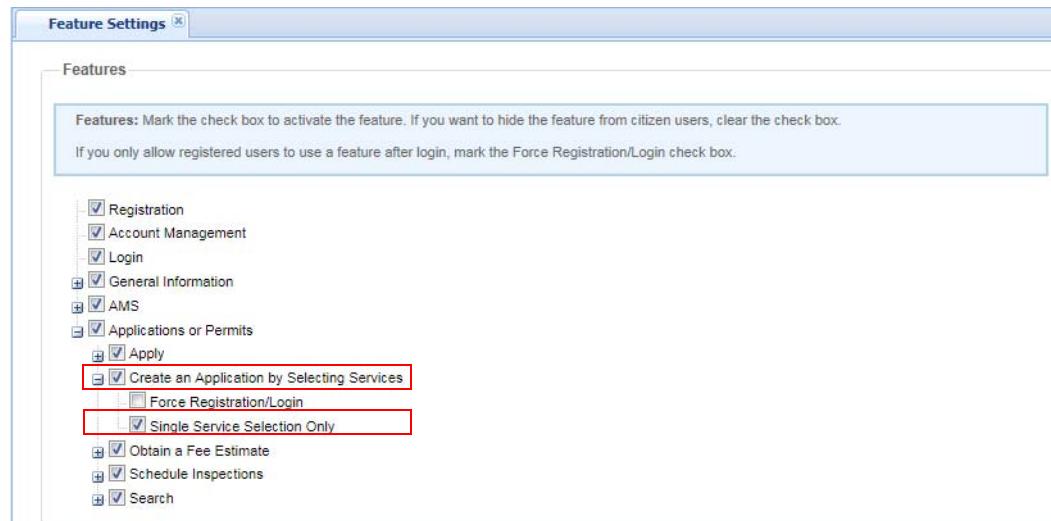
**To configure service selection for a main agency**

1. Navigate to **General > Settings > Feature Settings**.

*Citizen Access displays the Feature Settings page.*

2. Expand and mark the **Create an Application by Selecting Services** check box next to the desired module.

**Note:** *This check box is only available for the main agency in the multiple-agency administration.*



3. Mark or clear the **Single Service Selection Only** check box.
4. Click the **Save** button.
5. Click the **Clear Cache** button.

6. Log in to Citizen Access as the main agency's public user and click the **Create an Application by Selecting Services** hyperlink from the Welcome page.

Citizen Access displays the **Select Services** page.

If the *Single Service Selection Only* check box is marked in Feature Settings, the Select Services page displays a list of services for public users to make a single selection only.

**Select Services**

To select services, you must first locate the city or county that provides the service in the drop down below. After locating the service provider, place a check in the box for the service you wish to purchase. If you are unsure who the service provider is, you may search for the address in the [Building Dept. Directory](#). \*Note - if you right click on the link you may choose to open the link in a new window so you don't have to navigate back to this page.

Commercial - Demolition  
 Commercial - Floodplain  
 Commercial - Mechanical  
 Commercial - RV or MH Park  
 Commercial - Sign  
 Commercial - Site Development  
 Commercial - Structural  
 Commercial Fire  
 Residential - Demolition  
 Residential - Floodplain  
 Residential - Manufactured Dwelling  
 Residential - Mechanical  
 Residential - Site Development  
 Residential - Structural  
 Residential Fire

If the *Single Service Selection Only* check box is cleared in Feature Settings, the Select Services page displays a list of services for public users to make a single selection or multiple selections.

**Select Services**

To select services, you must first locate the city or county that provides the service in the drop down below. After locating the service provider, place a check in the box for the service you wish to purchase. If you are unsure who the service provider is, you may search for the address in the [Building Dept. Directory](#). \*Note - if you right click on the link you may choose to open the link in a new window so you don't have to navigate back to this page.

Commercial - Demolition  
 Commercial - Floodplain  
 Commercial - Mechanical  
 Commercial - RV or MH Park  
 Commercial - Sign  
 Commercial - Site Development  
 Commercial - Structural  
 Commercial Fire  
 Residential - Demolition  
 Residential - Floodplain  
 Residential - Manufactured Dwelling  
 Residential - Mechanical  
 Residential - Site Development  
 Residential - Structural  
 Residential Fire

## CHAPTER 6:

# REGISTRATION SETTINGS PAGE

The Registration Settings page offers registration configurations. The registration configuration provides the details for Register License, Expiration Interval Settings, Password Settings, CAPTCHA Settings, Login Settings, and Reset Password Settings. If you want your agency to require registration to perform tasks in a module, you must define the forced registration setting on the Feature Settings page for each module. See [Configuring Required Registration on page 85](#). For complete information regarding registration implementation, see [Chapter 12: Defining the Registration and Account Management Process on page 222](#).

To customize the content of the registration e-mails exchanged between the agency and public users, navigate to **Civic Platform > Administration > Setup > Communication Manager > Notification Templates**. Refer to the Notification Templates section of the *Accela Civic Platform Administrator Guide*.

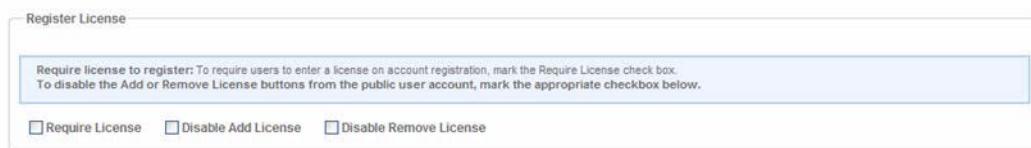
### Topics

- [Register License](#)
- [Expiration Interval Settings](#)
- [Security Settings](#)
- [CAPTCHA Settings](#)
- [Login Settings](#)
- [Reset Password Settings](#)

## Register License

The Register License section of the Registration Settings page provides configurations supporting license functionality during the registration and application process.

**Figure 38: Register License**



### Topics

- [Requiring License](#)

- Disabling Add License
- Disabling Remove License

## Requiring License

You can mark the Require License check box to require a public user to associate at least one license when registering for an online account. When this feature is enabled, the first page of the registration process requires license information data entry. Only after the license information is validated, the applicant can proceed with registration process or add additional licenses.

If you require license from applicants, an Select from Professionals button displays in the Contact section of the registration page. When applicants click the button, they can select an licensed professional with the associated license as the contact. See [Figure 39: Select from Professional in the Contact Information Section](#).

**Figure 39: Select from Professional in the Contact Information Section**

Account Registration Step 2:  
Enter Account Information

\* indicates a required field.

Login Information											
* E-Mail Address: <input type="text" value="admin"/>	(?)	* Repeat E-Mail Address: <input type="text"/>									
* Password: <input type="password" value="*****"/>											
* Select a Security Question: <input type="text" value="--Select--"/>											
Mobile Phone: (+ 001) <input type="text"/>											
<input type="checkbox"/> Receive SMS Messages											
<b>Contact Information</b> <div style="border: 1px solid red; padding: 2px; margin-left: 10px;">Select from Professionals</div>											
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Select a contact to attach to this application. If multiple addresses exist for that contact, you may select those in next step.</p> <p>Showing 1-2 of 2</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #f2f2f2;">Category</th> <th style="background-color: #f2f2f2;">Type</th> <th style="background-color: #f2f2f2;">Name</th> </tr> </thead> <tbody> <tr> <td style="background-color: #f2f2f2;"><input type="radio"/></td> <td style="background-color: #f2f2f2;">Associated License Contractor</td> <td style="background-color: #f2f2f2;">HISAKO ENTERPRISES INC Contractor 865786</td> </tr> <tr> <td style="background-color: #e0f2e0;"><input type="radio"/></td> <td style="background-color: #e0f2e0;">Associated License Contractor</td> <td style="background-color: #e0f2e0;">J A A CONSTRUCTION AND SON Contractor 285684</td> </tr> </tbody> </table> </div> <div style="display: flex; justify-content: space-around;"> <input style="margin-right: 10px; border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px; background-color: #fff; color: #005a9c; font-weight: bold; font-size: 10px; font-family: inherit; text-decoration: none; text-align: center; white-space: nowrap; outline: none; cursor: pointer; transition: all 0.3s ease;" type="button" value="Continue"/> <input style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px; background-color: #fff; color: #005a9c; font-weight: bold; font-size: 10px; font-family: inherit; text-decoration: none; text-align: center; white-space: nowrap; outline: none; cursor: pointer; transition: all 0.3s ease;" type="button" value="Discard Changes"/> </div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <input style="border: 1px solid #005a9c; padding: 2px 10px; border-radius: 5px; background-color: #fff; color: #005a9c; font-weight: bold; font-size: 10px; font-family: inherit; text-decoration: none; text-align: center; white-space: nowrap; outline: none; cursor: pointer; transition: all 0.3s ease;" type="button" value="Select from Professionals"/> <input style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px; background-color: #fff; color: #005a9c; font-weight: bold; font-size: 10px; font-family: inherit; text-decoration: none; text-align: center; white-space: nowrap; outline: none; cursor: pointer; transition: all 0.3s ease;" type="button" value="Add New"/> </div>			Category	Type	Name	<input type="radio"/>	Associated License Contractor	HISAKO ENTERPRISES INC Contractor 865786	<input type="radio"/>	Associated License Contractor	J A A CONSTRUCTION AND SON Contractor 285684
Category	Type	Name									
<input type="radio"/>	Associated License Contractor	HISAKO ENTERPRISES INC Contractor 865786									
<input type="radio"/>	Associated License Contractor	J A A CONSTRUCTION AND SON Contractor 285684									
<input style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px; background-color: #fff; color: #005a9c; font-weight: bold; font-size: 10px; font-family: inherit; text-decoration: none; text-align: center; white-space: nowrap; outline: none; cursor: pointer; transition: all 0.3s ease;" type="button" value="Continue Registration »"/>											

If you enable the Requiring License feature, you must also configure the settings for the associated e-mails, Registered License web page, License List web page, and Confirm License web page.

### To require a license for registration

1. Navigate to **General Settings > Registration Settings**.  
*Citizen Access displays the Registration Settings page.*
2. Go to the Register License area and mark the **Require License** check box.
3. In Civic Platform, navigate to **Administration > Setup > Communication Manager > Notification Templates**.

- a. Select the **Validate Citizen User** notification template.
  - b. Customize the content of the e-mail. Refer to the Notification Templates section of the *Accela Civic Platform Administrator Guide*.
  - c. Click **Save**.
4. Customize associated web pages: Registration License, License List, and Confirm License. Select each page from the Pages area in the Navigation panel, customize labels, button text, or page content, and then click **Save**.
- The **Registration License** page

**ON-LINE SERVICES**

**Accela Citizen Access™**

Home Building Licenses Permit Service Request

**Account Registration Step 1:**  
Enter License Information

By identifying the professional licenses you hold you will have access to additional features in the Citizen Portal. Enter license information below (one at a time) and the City will verify your license status with the State or City's database.

You may add additional licenses on the subsequent screen. In certain circumstances (such as license-right by proxy through an employer) even after identifying your license(s) a City employee must perform additional validation. In these cases, your access to certain features of the Citizen Portal may be limited pending approval.

\* indicates a required field.

**License Information**

\*License Type: \*State License Number:  
--select--

- The **License List** page

**ON-LINE SERVICES**

**Accela Citizen Access™**

Home Building Licenses Permit Service Request

**Adding a License:**

**License Information**

100 results found matching lookup criteria  
Search a license number to continue.

Showing 91-100 of 100	Type	Name
Licence Number		
08TN-000000-	CONTRACTOR	
03246	CONTRACTOR	
08TN-000000-	CONTRACTOR	
03258	CONTRACTOR	
08TN-000000-	CONTRACTOR	
03271	CONTRACTOR	
122	CONTRACTOR	Jason Clark McDonald
A712345GC	CONTRACTOR	Betsy Higgins

<Prev Additional Results: 1 2 3 4 5 6 7 8 9 10 Next >

- The Confirm License page

**ON-LINE SERVICES**

**Accela Citizen Access™**

Home Building Licenses Permit Service Request

**Confirm License**

Your search returned the following licensed professionals. If the information is incorrect, click the "Remove" button and if necessary search again below. If all information is correct choose either "Continue Registration" or "Add to My Licenses" to proceed.

**License Look-up Results**

License	
LUCY	CA ARCHITECT
	CA-1
	Issued:
CA	Expires:
Tel:	Insured Max:
Fax:	

If you have correctly identified a license, click the "Add to My Licenses" button.

Once you have added all licenses to your list, click the "Continue Registration" button. You will have another chance to review all your licenses at the end of the registration process.

**Continue Registration** (I'm done adding licenses)    **Add to My Licenses** (I have more licenses)

## Disabling Add License

Administrators can configure the ability to accept an additional licensed professional on an application intake form or restrict the number of additional licensed professionals. If you want to restrict the number of licensed professionals on an application, mark the Disable Add License check box and save the changes.

### To restrict additional licensed professionals on an application

1. From the General Area, navigate to the **Registration Settings** page.  
*Citizen Access Setup displays the Registration Settings page.*
2. Go to the **Register License** section.
3. Mark or clear the **Disable Add License** check box to set the configuration.

**Registration Settings**

**Register License**

Require license to register: To require users to enter a license on account registration, mark the Require License check box. To disable the Add or Remove License buttons from the public user account, mark the appropriate checkbox below.

Require License     **Disable Add License**     Disable Remove License

**Expiration Interval Settings**

Set Expiration Interval: Mark the check box to enable the expiration interval functionality. When the feature is activated, the system purges all the inactive user accounts after the defined number of days.

Purge Expired Account Interval  50 Days

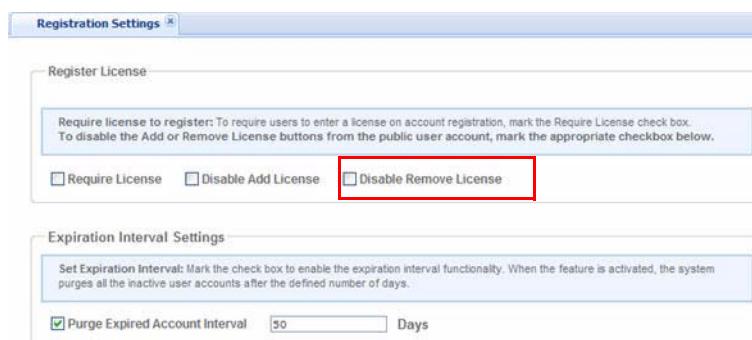
4. Click the **Save** button.

## Disabling Remove License

You can restrict applicants from removing an associated license with an application. You do this by hiding the Remove License button from display to public users.

### To hide the Remove License button

1. From the General Area, navigate to the **Registration Settings** page.  
*Citizen Access Setup displays the **Registration Settings** page.*
2. Go to the **Register License** section.
3. Mark or clear the **Disable Remove License** check box to set the configuration.



The screenshot shows the 'Registration Settings' page with the 'Register License' section selected. Within this section, there is a note about requiring a license for account registration and another note about disabling the 'Add' and 'Remove License' buttons. Below these notes are three checkboxes: 'Require License', 'Disable Add License', and 'Disable Remove License'. The 'Disable Remove License' checkbox is highlighted with a red border. Below this section is the 'Expiration Interval Settings' section, which includes a note about purging inactive accounts after a defined number of days, a checked checkbox for 'Purge Expired Account Interval', and a input field set to '50' days.

4. Click the **Save** button.

## Expiration Interval Settings

[Figure 40: Expiration Interval Settings on page 93](#) shows the Expiration Interval Settings section of the Registration Settings page. This section relates to the number of days Civic Platform saves inactive registrant information before purging from the system. If the Account Verification setting is enabled, a registration account remains inactive until the registrant activates their account by selecting the hyperlink associated with their account verification e-mail they received after registration. Refer to [Defining Activation E-mails on page 100](#). The expiration interval setting defines how many days allocated to the registrant to select their hyperlink before their registrant information expires and is purged.

This feature functions by defining an EMSE script that purges the inactive accounts and runs as a regularly scheduled batch job. The script references the number of days in this setting. See an example script following the instructions below. For more information about EMSE scripts and batch jobs, contact Accela Customer Support for assistance. Some important details are in the "Event Manager and Script Engine" chapter and the "Writing Scripts" chapter in the [Accela Civic Platform Scripting Guide](#).

This setting relates to the Standard Choice Value PURGED\_EXPIRED\_ACCOUNT\_INTERVAL in the Standard Choice ACA\_CONFIGS. For instructions on configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

**Figure 40: Expiration Interval Settings**



### To configure the expiration interval

1. Navigate to **General Settings > Registration Settings**.

*Citizen Access Setup displays the Expiration Interval settings. See [Figure 40: Expiration Interval Settings](#).*

2. Mark the check box if you want to purge expired accounts.
3. Define the expiration interval in number of days in the Days field.
4. Write the EMSE script that purges the inactive accounts meeting that meet expiration criteria.

For example:

```
aa.print("=====purgExpiredInactiveAccount
begin=====");
var result = aa.publicUser.purgExpiredInactiveAccount();
if (result.getSuccess())
{
    aa.print("run purgExpiredInactiveAccount method
successfully!");
}
else
{
    aa.print("ERROR: run purgExpiredInactiveAccount method failed"
+ result.getErrorMassage());
}
aa.print("=====purgExpiredInactiveAccount
end=====")
```

5. Create a batch job to define the frequency Civic Platform runs the script. Refer to the Batch Job section of the *Accela Civic Platform Administrator Guide*.
6. Customize the Account Verification Expired page in the Login Folder of the Pages area in General Settings.

# Security Settings

Public access to your agency's Citizen Access portal requires a certain level of security. The specific level is dependent upon the agency and the type of functions they have on the portal. Password security is the first level of defense against harmful security threats. This section describes how to define password security for your agency.

**Figure 41: Security Settings**

The screenshot shows a 'Security Settings' page with the following configuration:

- Password Expiration Setting:** A note indicating to mark the check box to specify the length of time that a password remains active before it expires.
- Password Failed Attempts:** A note indicating to mark the check box and specify how many failed attempts are permitted before a password is locked and requires resetting.
- Authentication by Security Question:** A note indicating to mark the check box to require the user to answer a security question to log in, and specify the number of compulsory security questions in registration.

Below these notes are several input fields:

- Password Expires In  Days
- Lock Account After  Failed Attempts In  Hours
- Authentication by Security Question  
Compulsory Security Questions in Registration

## Topics

- [Setting Up a Password Policy](#)
- [Configuring the Password Settings](#)
- [Locking Account after Failed Attempts](#)
- [Enabling Authentication by Security Question](#)

## Setting Up a Password Policy

The first step in defining password security is to set up a password policy for your agency according to the industry standard set of password strength rules. These rules include character requirements, such as minimum password length, number of upper case characters and number of numeric characters. They also include password restrictions such as not allowing the user ID to be part of the password, or the password not being the same as the previous X number of passwords.

You can only configure the password strength rules from Civic Platform when logging in with multi-Agency administrative privileges. For the Civic Platform password strength rules to apply to Citizen Access public users, you must mark the check box for "Apply the same requirements for passwords for public users in Citizen Access" at the bottom on the same page that configures these password rules.

For the process, see the "Agencies and Functions" chapter of the *Accela Civic Platform On-Premise Supplement Administration Guide*.

## Configuring the Password Settings

The Password Settings section of the Register License page is used to configure password expiration settings and password failed attempts. These items relate to the password security

definition in the registration definition section. The password expiration setting field sets the number of days in which a user's password expires, and the password failed attempts fields set the number of times a user can enter an incorrect password during a specified period before their account is locked.

When account lockout policy is enabled, there is a risk of locking out legitimate users. To avoid locking out legitimate users who have simply mis-typed or forgotten their passwords, the best practice is to set the account lockout threshold to a high number. If a user does get locked out, a message displays. They also receive an account locked e-mail message, as described in [Chapter 7: Configuring Notification E-mails on page 100](#). In that case, they need to contact their agency and have then unlock the user's account.

### To configure the password settings

1. Navigate to **General Settings > Registration Settings**

*Citizen Access displays the Registration Settings page.*

2. Go to the Password Settings area.
3. To set a password expiration period, mark the **Password Expires In** check box, and enter the number of days for password expiration.
4. To set the account to lock after a number of failed attempts, mark the **Lock Account After** check box, then enter the number of failed attempts and the number of hours.
5. Click the **Save** button.
6. Configure the password lockout e-mail:
  - a. In Civic Platform, navigate to **Administration > Setup > Communication Manager > Notification Templates**.  
Refer to the Notification Templates section of the *Accela Civic Platform Administrator Guide*.
  - b. Write and customize the body of the e-mail using the text editor.
  - c. Click the **Save** button.
7. Configure the Change Password page:

- a. Navigate to **General > Pages > Account Management > Change Password**.

*Civic Platform displays the Change Password page.*

The screenshot shows a web-based application interface. At the top, there is a horizontal navigation bar with several tabs: Home, Service Request, Building, Land, Trade Name Management, and a 'more' dropdown menu. Below the navigation bar, the main content area has a title 'Change Password'. The form contains four input fields, each with a label and a question mark icon: 'User Name' (containing 'nbsp;'), 'Old Password' (containing '\*\*\*\*\*'), 'New Password' (containing '\*\*\*\*\*'), and 'Confirm Password' (containing '\*\*\*\*\*'). Below these fields is a 'Submit' button.

- b. Use the text editor to customize the Change Password page text.
- c. Customize any other labels or any other buttons as needed.
- d. Click the **Save** button.

## Locking Account after Failed Attempts

A failed login attempt can result from an invalid user name/password or an invalid answer to a security question. For example, if a user enters invalid user name and password twice, the failed attempts count is 2; if the user then enters invalid answer to the security question after clicking Login with valid user name and password, the failed attempts count increases to 3.

The registration settings provides the Lock Account after Failed Attempts option in the Security Settings section (see [Figure 41: Security Settings on page 94](#)). You can select the option and configure the number of failed attempts that Citizen Access allows before locking an account for a certain time period.

## Enabling Authentication by Security Question

The Authentication by Security Question option in the Security Settings section (see [Figure 41: Security Settings on page 94](#)) is an additional safeguard against unauthorized login to Citizen Access.

When a public user registers on the website, or when an authorized agent adds a clerk, no matter whether you enable or disable the Authentication by Security Question option, the user or agent must select one or more security questions to answer from the dropdown list of the Select a Security Question field.

If you enable the Authentication by Security Question option, when a public user logs in to Citizen Access, the user must answer a security question, as shown in [Figure 42: Security Question Verification](#).

**Figure 42: Security Question Verification**

The screenshot shows a web-based application interface. At the top is a horizontal navigation bar with several tabs: Home, Building, Licenses, General, Waste Management, AMS, and a 'more' dropdown menu. Below the navigation bar is a section titled 'Security Question Verification'. Inside this section, there is a note: 'The security question you answered when you first registered is displayed below. Please provide your security answer so we can verify your identity.' Below the note is a question: 'Security Question: What is the brand of your first car?'. Underneath the question is an input field labeled 'Security Answer:' containing the text 'for test'. To the right of the input field is a small 'i' icon. At the bottom of this section are two buttons: 'Continue' and 'Return to Login'.

The Compulsory Security Question in Registration setting defines the number of security questions that users must select to answer during registration. You can specify a number between 1 and the number of available security question choices which you configured for the Select a Security Question field of the registration page. For example, if you require 3 compulsory registration questions during registration, when a public user registers for an account, the user must select 3 different security questions to answer.

**Note:** *This authentication by security question setting does not apply to users who log in using an external user account with LDAP authentication or the single sign-on feature.*

## CAPTCHA Settings

CAPTCHA is an acronym based on the word “capture” and standing for Completely Automated Public Turing test to tell Computers and Humans Apart.

Citizen Access provides both visual and audio versions of CAPTCHA for registration and login. Users can click the **SPEAKER** button next to the CAPTCHA to access the sound, click the **REFRESH** button to obtain a clearer CAPTCHA word, or click the **QUESTION MARK** button when you have questions about CAPTCHA. A user has to enter the correct word into CAPTCHA for a successful registration or login. For more information, see [Figure 43: CAPTCHA for Login](#).

Figure 43: CAPTCHA for Login



There is a prerequisite for you to use CAPTCHA feature in Citizen Access: the web server must be able to access <http://www.google.com/recaptcha/api/verify>. For more information, see <https://developers.google.com/recaptcha/docs/verify>.

The CAPTCHA Settings section of the Registration Settings page provides configurations supporting CAPTCHA functionality during the registration and login process.

#### To enable CAPTCHA for registration and login

1. Navigate to **General Settings > Registration Settings**.

*Citizen Access displays the Registration Settings page.*

2. Go to the CAPTCHA Settings area.

3. Do any of the following:

- To enable CAPTCHA for registration, mark the check box prior to **Enable CAPTCHA for Registration**.

*The Enter Information page requires entering correct CAPTCHA before continuing registration.*

- To enable CAPTCHA for login, mark the check box prior to **Enable CAPTCHA for Login**.

*The Login page displays CAPTCHA.*

## Login Settings

**Figure 44: Login Settings** shows the Login Settings section of the Registration Settings page. If you mark the check box next to **Enable Direct Login after Registration** option, a **Login Now** button displays on the Registration Completion page. Public users can click the button to log in to Citizen Access without entering user name and password. If you unmark the option, the **Login Now** button is not available on the Registration Completion page.

**Note:** This feature works best when you mark the *Enable Auto-Activation and Stop Sending Account Verification E-mail* option in *Registration Settings*. Otherwise, public users' accounts are still inactive when the registration completes. Even though a user clicks the *Login Now* button, Citizen Access forbids the login from the inactive account.

**Figure 44: Login Settings**

The screenshot shows a 'Login Settings' section. It includes a note about enabling auto-activation and stopping account verification emails. Below this, there is a checkbox labeled 'Enable Direct Login after Registration In' followed by a text input field containing 'Second(s)'.

### To configure the login settings

1. Navigate to **General Settings > Registration Settings**  
*Citizen Access displays the Registration Settings page.*
2. Go to the Login Settings area.
3. Mark the **Enable Direct Login after Registration In** check box, and enter the number of seconds for the direct login to be effective. The default period is 300 seconds.  
If users click the *Login Now* button when the specified period of time elapses after their registration, Citizen Access prompts them to enter the user name and password.
4. Click the **Save** button.

## Reset Password Settings

**Figure 45: Reset Password Settings** shows the Reset Password Settings section of the Registration Settings page. You can mark the check box next to **Combine Reset Password and Security Question** to combine the Reset Password page and the Security Question page into one page. When public users request to reset their passwords, they can enter the email address and answer their security questions in one page. If you unmark the check box, the Reset Password page displays separately from the Security Question page.

**Figure 45: Reset Password Settings**

The screenshot shows a 'Reset Password Settings' section. It includes a note about combining the Reset Password and Security Question pages. Below this, there is a checkbox labeled 'Combine Reset Password and Security Question'.

## CHAPTER 7:

# CONFIGURING NOTIFICATION E-MAILS

Administrators must configure and customize the content and subject of e-mails by navigating to **Civic Platform > Administration > Setup > Communication Manager > Notification Templates**. Refer to the Notification Templates section of the *Accela Civic Platform Administrator Guide*.

Some of the e-mails administrators must edit and format include license renewal e-mails, password reset, registration of a public user account, account verification when a user registers for an account, and other types of e-mails.

The Registration process and License Verification and Renewal process have specific tasks associated with the e-mails exchanged between the agency and public user account. The instructional text associated with activation e-mails and license notification e-mails are provided for you separately.

## Topics

- [Customizing an E-mail](#)
- [Defining Activation E-mails](#)
- [Defining License Notification E-mails](#)

## Customizing an E-mail

You can customize an e-mail by completing a few basic tasks.

First, navigate to **Civic Platform > Administration > Setup > Communication Manager > Notification Templates**. Refer to the Notification Templates section of the *Accela Civic Platform Administrator Guide*.

You must define the recipients and the contents of the e-mail. Then you must provide information in the From, Subject, and Body fields to create the information that the e-mail contains. For more information about the license verification and other types of e-mails, see [Chapter 18: License Verification and Online Renewal on page 425](#). Specifically, refer to [Configuring License Renewal on page 440](#).

## Defining Activation E-mails

You can configure Citizen Access to automatically send an activation e-mail to the registrant after registering for an account in ACA. This e-mail contains a hyperlink that the registrant selects to confirm and activate their public user account. The registration process remains in an

inactive state until the registrant selects the hyperlink that the activation e-mail contains. Once Civic Platform receives the response, it activates the registration and sends the standard registration e-mail confirming registration activation to the registrant. Civic Platform purges those accounts that do not get verification from the system. Refer to [Expiration Interval Settings on page 92](#).

To configure this feature, you must customize the content in the Account Verification e-mail, define the URL for the hyperlink, and set the Purged Account Interval. If you do not choose to use this feature, go to Registration Settings and mark the Enable Auto-Activation and Stop Sending Account Verification E-mail check box.

#### To configure the activation e-mail

1. Go to Registration Settings and clear the **Enable Auto-Activation and Stop Sending Account Verification E-mail** check box.
2. Configure the Standard Choices required for the feature in Civic Platform.
  - a. Navigate to **Civic Platform > Agency Profile > Standard Choices**.  
*Civic Platform displays the Standard Choices-Search page.*
  - b. Configure the Standard Choices listed in [Table 4: Activation E-mail Related Standard Choices](#). For complete information on configuring the Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.
3. Customize the related e-mail notification template in Civic Platform.
  - a. Navigate to **Civic Platform > Administration > Setup > Communication Manager > Notification Templates**.
  - b. Select Account Verification e-mail from the e-mail customization drop-down list.
  - c. Refer to the Notification Templates section of the *Accela Civic Platform Administrator Guide*.
4. When customizing the content of the notification template, set the hyperlink for activation.
  - a. Select the text you want to be the hyperlink.
  - b. Click the **Hyperlink** button.
  - c. Use the format below to set the hyperlink:  

```
http://@ACA_SERVER@:@ACA_SERVER_PORT@/Account/
PreAccountVerification.aspx?uuid=$$UUID$$
```

Replace @ACA\_SERVER@ with the agency Citizen Access URL.  
If the agency uses a port, replace @ACA\_SERVER\_PORT@ with the port used for Citizen Access.
5. Click the **Save** button.
6. Define the number of days Civic Platform saves inactive registrant account information. Refer to [Expiration Interval Settings on page 92](#). This requires you to define an EMSE script and set as a regularly scheduled batch job.

**Table 4: Activation E-mail Related Standard Choices**

Standard Choice	Standard Choices Value	Description
CONTENT_TEMPLATE_LIST	ACA_EMAIL_ACCOUNT_VERIFICATION_BY_HYPERLINK_CONTENT	E-mail content
CONTENT_TEMPLATE_LIST	ACA_EMAIL_ACCOUNT_VERIFICATION_BY_HYPERLINK_SUBJECT	E-mail subject
ACA_EMAIL_TO_AND_FROM_SETTING	ACA_EMAIL_ACCOUNT_VERIFICATION_BY_HYPERLINK_MAILFROM	E-mail from address
ACA_CONFIGS	PURGED_EXPIRED_ACCOUNT_INTERVAL	The maximum number of days Civic Platform holds onto inactive accounts before purging.

## Defining License Notification E-mails

Public users can register for an ACA account and associate a license with it. This license number may be associated with multiple public user accounts. For example, a business license could be associated to various employees: the owner, the manager, and an administrative assistant. This provides flexibility in performing functions within ACA for the business. For example, if the administrative assistant has a public user account with the license associated with it, he/she can upload documents for the manager to ACA. This is assuming the agency administrator has already granted permissions for licensed professionals to upload documents.

Civic Platform provides a way to notify the original registered public user when their licenses are associated with another public user account as a means of security. You can configure the license notification e-mail to not only notify the registrant, but also notify either the original license registrant or all associations with the license. For example, if only the original license registrant is notified along with the registrant, the e-mail notification may only go to the business owner as the original license registrant and the administrative assistant when the administrative assistant registers and associates the license with their public user account. When the e-mail is configured to go to all associations with the license, the owner and manager both receive e-mail notification when the administrative assistant associates the license with their account.

### To configure the license notification e-mail

1. In Civic Platform, navigate to **Administration > Setup > Communication Manager > Notification Templates**.
2. Select the notification template **ACA\_MESSAGE\_ASSOCIATING\_LICENSE\_TO\_MULTIPLE\_ACCOUNTS**.
3. Customize the e-mail using the text editor and save your changes.

Refer to the Notification Templates section of the *Accela Civic Platform Administrator Guide*.

## CHAPTER 8:

# MODULE SETTINGS CONFIGURATION PAGE

---

The Module Settings configuration page is one of the most critical elements to setting up your Citizen Access website. The page comprises multiple sections which contain configurations specifically relevant to the module. Sections include: maps, inspections, workflow, online payment accessibility, record copy functionality, contact display controls, search functionality, filter functionality, report display controls, license verification page configuration, and record detail section configuration. See [Figure 46: Module Settings Configuration Page](#).

This chapter details the configurations in each section. The configurations in a section may completely control implementation of a feature in ACA. For example, the Workflow section. However, it is most common to have additional configurations, such as Standard Choice configuration, Function Identification (FID) settings, or configuration tasks in Civic Platform that houses complete implementation of a feature.

## Topics

- [Maps](#)
- [Inspections](#)
- [Workflow](#)
- [Fees](#)
- [Copy Record Settings](#)
- [Contact Information Controls](#)
- [Filter Record Search Results](#)
- [Application Status](#)
- [Combine Button with Record Type](#)
- [Record Search](#)
- [Record Type Filters](#)
- [Report Display Controls](#)
- [License Verification Page Configuration](#)
- [Record Detail Section Configuration](#)
- [Social Media Settings](#)

**Figure 46: Module Settings Configuration Page**

AMS Settings

Maps

Mark the check box to provide a map display option.

Show on Map    Use map to select work location

Inspections

Select which users are able to schedule inspections: Choose between All ACA Users, Record Creator, Licensed Professional, Contact, or Owner.

Select users who can enter inspection contacts when scheduling or requesting inspections: Select user groups from All ACA Users, Registered Users, Record Creator, Contact, Owner, Licensed Professional, and Specific Licensed Professional.

Select users who can view inspection contact information on the Inspection Detail page: Choose between All ACA Users, Registered User, Record Creator, Contact, Owner, Licensed Professional, and Specific Licensed Professional.

Display a default contact when scheduling an inspection: If Yes is selected, system displays a primary contact as the Inspection contact by default when citizen schedules an inspection. If No is selected, citizen need to fill or choose an inspection contact manually.

Select Display Optional Inspections to Citizen Users: If Yes is selected, optional inspections display to citizen users. If No is selected, optional inspections will not display to citizen users.

Allow multiple inspections: If Yes is selected, allow multiple inspections and use inspection type settings for each inspection type. If No is selected, do not allow any multiple inspections.

Select who is able to schedule inspections:

All ACA Users    Registered Users    Record Creator    Contact    Owner    Licensed Professional  
 Specific Licensed Professional

Select users who can enter inspection contacts when scheduling or requesting inspections:

All ACA Users    Registered Users    Record Creator    Contact    Owner    Licensed Professional  
 Specific Licensed Professional

Select users who can view inspection contact information on the Inspection Detail page:

All ACA Users    Registered Users    Record Creator    Contact    Owner    Licensed Professional  
 Specific Licensed Professional

Display a default contact when scheduling an inspection:

Yes    No

Display optional inspections:

Yes    No

Allow Multiple Inspections:

Yes    No

## Maps

The Maps section on the Module Settings page controls whether public users have access to Accela GIS (Silverlight version) from a specific module. Accela GIS (Silverlight version) provides either a Bing map, ESRI map, or other supported map.

If you want to enable user access to Accela GIS (Silverlight version) at the module level, you must first activate the GIS map control and designate a GIS Server URL in GIS Settings. See [GIS Settings on page 61](#) for instructions.

For more information about which pages in Citizen Access provide access to Accela GIS (Silverlight version), see the “Integrating with Citizen Access” chapter in the *Accela Civic Platform GIS User Guide*.

**Figure 47: Maps**

Maps

Mark the check box to provide a map display option.

Show on Map    Use map to select work location

### To display the Show on Map button in a module

1. Navigate to **Module Settings > Maps**.
2. Mark the **Show on Map** check box.

*Citizen Access Setup enables the display of the Show on Map button in various pages or sections such as:*

- Record search result list

The screenshot shows the 'General Search' interface with the following fields and controls:

- General Search** header with a 'General Search' dropdown.
- Search my records only** checkbox.
- Record Number:** input field.
- Record Type:** dropdown menu.
- Project Name:** input field.
- Record Status:** dropdown menu.
- Start Date:** input field (11/06/2012) with a calendar icon.
- End Date:** input field (11/06/2013) with a calendar icon.
- License Type:** dropdown menu.
- State License Number:** input field.
- First:** input field.
- Last:** input field.
- Name of Business:** input field.
- Business License #:** input field.
- Address Line 1:** input field.
- Address Line 2:** input field.
- City:** input field.
- State:** input field.
- Zip:** input field.
- Search** and **Clear** buttons.

Below the search area, it says "100+ Record results matching your search results". A link "Click any of the results below to view more details." is present.

At the bottom, there is a table titled "Showing 1-10 of 100+" with the following columns: Date, Record Number, Record Type, Expiration Date, Related Records, Created By, Status, and Action. The table contains four rows of data.

Date	Record Number	Record Type	Expiration Date	Related Records	Created By	Status	Action
11/06/2013	13CBB-00000-00008	Restaurant	0	ADMIN	Open		
11/06/2013	13CBB-00000-00007	Restaurant	0	ADMIN	Open		
11/05/2013	ORE13TMP-000323	New Building Workflow	0	DEMO			
11/05/2013	13CBB-00000-00006	Restaurant	0	tony	Open		

A "Show on Map" button with a globe icon is located to the right of the table.

- Property search result list

**Look Up Property Information**

Enter information below to look up property information.

- Address
- Parcel Information
- Owner
- Record Information
- Licensed Professional

Select the search type from the drop-down list.

**Look Up by Parcel Information**

Parcel Number:

Lot:  Block:  Subdivision:

P.O. BOX (T):

Recording Date:

Property Type:

Distance (T):  MILE

Include Retired Parcels

---

100+ results found matching lookup criteria

Click any of the results below to view more details.

Show on Map

Parcel Number	Address
147-31-	2104 N EAST ST, SUNRISE AZ 86004 United States
147-32-	2112 N EAST ST, SUNRISE AZ 86004 United States
147-33-	2110 N EAST ST, SUNRISE AZ 86004 United States
147-34-	2000 N EAST ST, SUNRISE AZ 86004 United States

**To display the Use map to select work location button in a module**

1. Navigate to **Module Settings > Maps**.

2. Mark the **Use map to select work location** check box.

*Citizen Access Setup enables the display of the Use map to select work location button on the Address and Parcel sections in an application intake form.*

The screenshot shows a web-based application intake form. At the top, there is a navigation bar with tabs: Home, Building, Licenses, Service Request, and Airport. Below the navigation bar, there are links for 'Create an Application', 'Search Applications', and 'Obtain a Fee Estimate'. The main content area is titled 'APOLP' and shows a process flow: 'Step 1' (highlighted in blue), 'Review' (yellow), and 'Record Issuance'. Under 'Step 1: Step 1 > Page 1', there is a section titled 'Address' with a 'Auto-fill with' dropdown set to '1 S 12345 BLVD W, UNIT UNIT, SHENZHEN AZ 1234567890'. Below this are fields for Street No., Street Name, Street Type, Direction, City, State, Zip, Applicant Address, Applicant Phone, Country (set to United States), County, and two address lines. A 'Clear' button is also present. To the right of the address section is a link 'Use map to select work location:' with a small globe icon. Below the address section is a 'Parcel' section with fields for Parcel Number, Lot, Property Type, Parcel Area, and Land Value. Another 'Use map to select work location:' link with a globe icon is located here. The entire form is contained within a vertical scrollable frame.

## Inspections

You can provide or hide Civic Platform inspection information on the record detail page through role assignment for record detail page sections. Role assignment can be useful if you want to completely disable some user roles from scheduling inspections for a module. For example, you can choose to provide inspection information for record creators in the Permits module and Licensing module, but not for the Enforcement module. For more information on role assignment, see [Record Detail Section Configuration on page 130](#).

If inspections are enabled for the module, the Inspections section of the Module Settings page allows you to define permissions for which public user can schedule an inspection, set availability of inspection information about public users, enable or disable a default inspection contact, define the display of the optional inspections on the Record Detail page, and enable multiple inspection scheduling. See [Figure 48: Inspections](#).

Refer to [Chapter 16: Managing Inspections on page 387](#) for the complete inspection implementation options for your Citizen Access website.

For information on how to set up inspections in Civic Platform, refer to the “Inspections” chapter in the *Accela Civic Platform Administrator Guide*.

**Figure 48: Inspections**

The screenshot shows the 'Inspections' configuration page. It includes the following sections:

- Select which users are able to schedule inspections:** Choose between All ACA Users, Record Creator, Licensed Professional, Contact, or Owner.
- Select users who can enter inspection contacts when scheduling or requesting inspections:** Select user groups from All ACA Users, Registered Users, Record Creator, Contact, Owner, Licensed Professional, and Specific Licensed Professional.
- Select users who can view inspection contact information on the Inspection Detail page:** Choose between All ACA Users, Registered User, Record Creator, Contact, Owner, Licensed Professional, and Specific Licensed Professional.
- Display a default contact when scheduling an inspection:** If Yes is selected, system displays a primary contact as the Inspection contact by default when citizen schedules an inspection. If No is selected, citizen need to fill or choose an inspection contact manually.
- Select Display Optional Inspections to Citizen Users:** If Yes is selected, optional inspections display to citizen users. If No is selected, optional inspections will not display to citizen users.
- Allow multiple inspections:** If Yes is selected, allow multiple inspections and use inspection type settings for each inspection type. If No is selected, do not allow any multiple inspections.
- Select who is able to schedule inspections:** Checkboxes for All ACA Users, Registered Users, Record Creator, Contact, Owner, Licensed Professional, and Specific Licensed Professional.
- Select users who can enter inspection contacts when scheduling or requesting inspections:** Checkboxes for All ACA Users, Registered Users, Record Creator, Contact, Owner, Licensed Professional, and Specific Licensed Professional.
- Select users who can view inspection contact information on the Inspection Detail page:** Checkboxes for All ACA Users, Registered Users, Record Creator, Contact, Owner, Licensed Professional, and Specific Licensed Professional.
- Display a default contact when scheduling an inspection:** Radio buttons for Yes (selected) and No.
- Display optional inspections:** Radio buttons for Yes (selected) and No.
- Allow Multiple Inspections:** Radio buttons for Yes (selected) and No.

## Topics

- [Configuring Schedule Inspections Permission](#)
- [Configuring Inspection Contact Input Permission during Schedule/Request Inspections](#)
- [Configuring Inspection Contact Information Viewing Permission on Inspection Detail Page](#)
- [Displaying a Default Contact when Scheduling an Inspection](#)
- [Displaying Optional Inspections](#)
- [Allowing Multiple Inspections](#)

## Configuring Schedule Inspections Permission

Define who has permissions to schedule inspections for the Module. Mark check boxes next to the users allowed to schedule inspections. Options include: All ACA Users, Registered Users, Record Creator, Contact, Owner and Licensed Professional.

## Configuring Inspection Contact Input Permission during Schedule/Request Inspections

Define who has permissions to input or change the inspection contact information when they are scheduling or requesting an inspection. Mark check boxes next to the users allowed to do so. Options include: All ACA Users, Registered Users, Record Creator, Contact, Owner, Licensed Professional, and Specific Licensed Professional.

## Configuring Inspection Contact Information Viewing Permission on Inspection Detail Page

Define who has permissions to view the inspection contact information in the Inspection Detail page. Mark check boxes next to the users allowed to do so. Options include: All ACA Users, Registered Users, Record Creator, Contact, Owner, Licensed Professional, and Specific Licensed Professional.

## Displaying a Default Contact when Scheduling an Inspection

The default option is **Yes**, which means when public users schedule an inspection, the primary contact of the application displays as the default inspection contact.

If you mark the **No** option, when public users schedule an inspection, there is no default inspection contact. Public users must select a contact from the contacts associated with the application, or manually enter the contact information.

## Displaying Optional Inspections

Mark the **Yes** option for Optional Inspection display in the inspection list. Mark the **No** option to exclude Optional Inspections from the inspections list.

The public user views required inspections or both required and optional inspections based on the administrative configuration for inspections in ACA Admin. The required inspections have Required in the Status column on the Record Detail page.

The screenshot shows a modal dialog box titled "Schedule/Request an Inspection". It contains a dropdown menu for "Building B" and a checked checkbox for "Show optional inspections". Below these are 17 optional inspection types listed as radio buttons:

- 200 Slab (required)
- 205 Ditch (required)
- 210 Temporary Pole (optional)
- 215 Temporary Power (optional)
- 220 Swim Pool Rough/Bonding (optional)
- 225 Others Not Listed (required)
- 230 Wall Cover (optional)
- 235 Ceiling Cover (optional)
- 240 Disconnect/Reconnect (optional)
- 245 Delta Ground (optional)

At the bottom of the list are navigation links "< Prev 1 2 Next >". At the very bottom are "Continue" and "Cancel" buttons.

## Allowing Multiple Inspections

If Yes is selected, this module allows multiple inspections scheduling and uses inspection type settings for each inspection type. If No is selected, Citizen Access does not allow multiple inspection scheduling. For more information about how to implement multiple inspections, see [Providing Multiple Inspection Scheduling on page 399](#).

## Workflow

The workflow section of the Module Settings page provides an e-mail address display option on the Workflow task list of the Processing Status section on the Record Detail page. See [Figure 20: Viewing the E-mail Address Associated with Processing a Record on page 54](#). For more information about agency user name display, see [Defining the Display of User Names or User Initials on page 50](#).

**Figure 49: Workflow Display E-mail Address**



## Fees

The Fees section provides you with the configuration to restrict public users from accessing online payment functionality from the Record Detail page. See [Figure 50: Display Pay Fee Link Setting](#). Mark the check box to display the Pay Fee Link on the Record Detail page to public users. Clear the check box to hide it.

This configuration is necessary when an agency does not implement online payment processing. Thus a public user cannot go into the pay fees page during the application process because the agency does not offer a way to pay monies due over the Internet. For more information, see [Removing the Pay Fees Link on page 377](#).

**Figure 50: Display Pay Fee Link Setting**



## Copy Record Settings

The Copy Record Settings section provides you with the ability of determining whether to allow public users to use the copy record functionality. See [Figure 51: Display Copy Record Functionality Setting](#). Mark the Enable Copy Record check box to allow public users to copy an existing record to create a new record in various pages, such as Record Detail page, Receipt page, record list, and record search list. When public users copy a record, they specify the source record content to include in the new record. See [Figure 52: Copying Record](#).

**Note:** Public users may find that some of the source content options are disabled. This is because the page flow associated with the record type does not add those components, consequently the application intake form does not include those sections. For detailed information about adding components to a page flow, see [Working with Components on page 148](#).

Figure 51: Display Copy Record Functionality Setting

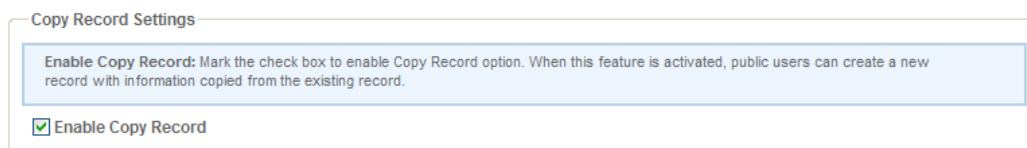


Figure 52: Copying Record

The screenshot illustrates the process of copying a record. At the top, a 'Records' list shows several entries with columns for Date, Related Records, Record Number, Created By, Action, Agency, and Module. One row is selected, indicated by a checked checkbox in the 'Related Records' column. An arrow points from this row to a 'Copy Record' dialog box. The dialog box contains a message: 'A new record will be created with the information you choose to copy from the selected record.' It lists 'Available Sections' with checkboxes: Address, Parcel, Owner, Licensed Professionals, Contacts, Detail Information, Additional Information, Application-Specific Information, Application-Specific Information Tables, Education, Continuing Education, Examination, and Valuation Calculator. At the bottom, there is a note: 'Please verify all information on the new record before submitting it.' and two buttons: 'Copy' and 'Cancel'.

## Contact Information Controls

You can assign permissions for who can view Contact information on the record detail page in the Contact Display Controls section of a Module Settings page. Grant access to view Contact Type information to the various ACA User Roles by marking its associated check box for each

module on its Module Settings page. Restrict access to the ACA User Roles by clearing the check box. Refer to [List 2: ACA User Role Definitions](#) for a complete list of User Roles.

The Standard Choice CONTACT TYPE defines the contact types. You can determine which contact types to be used to create contact information or to search records. For detailed information about setting contact types, refer to [Configuring Contacts on page 319](#).

**Figure 53: Contact Display Controls**

The screenshot shows a dialog box titled 'Contacts Display Controls'. At the top, a note says: 'Restrict who can view Contacts in the Record detail page for this Module: Choose between All ACA Users, Record Creator, Licensed Professional, Contact, and Owner.' Below this is a table titled 'Role Assignment for Contact Types' with columns for Contact Type and five user roles: ALL ACA Users, Record Creator, Licensed Professional, Contact, and Owner. Each row represents a contact type, and each column contains a checkbox indicating whether that role has access. For example, 'Applicant' has access to ALL ACA Users, Record Creator, and Contact, but not Licensed Professional or Owner. Other contact types like 'Citizen' and 'Manager' have similar access patterns. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Contact Type	ALL ACA Users	Record Creator	Licensed Professional	Contact	Owner
Applicant	<input checked="" type="checkbox"/>				
Billing Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business Owner	<input checked="" type="checkbox"/>				
Citizen	<input checked="" type="checkbox"/>				
Contact	<input checked="" type="checkbox"/>				
Contractor	<input checked="" type="checkbox"/>				
Corporation	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
License Owner	<input checked="" type="checkbox"/>				
Limited Liability Company	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Limited Liability Partnership	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Management Company	<input checked="" type="checkbox"/>				
Manager	<input checked="" type="checkbox"/>				
Neighbor	<input checked="" type="checkbox"/>				
Occupant/Tenant	<input checked="" type="checkbox"/>				

#### To assign permissions to view contact information

1. Navigate to a **Module Settings > Contacts Display Controls > Role Assignment for Contact Types**.

*Citizen Access Setup displays the Contact Display Controls section. See [Figure 53: Contact Display Controls](#).*

2. Mark or clear the check boxes next to the ACA Users to grant or restrict access to contact information on the record detail page.

Refer to [List 2: ACA User Role Definitions](#).

3. Click **OK**.

#### List 2: ACA User Role Definitions

Role Name	Description
All ACA Users	All public users, including the anonymous (non-registered) user.
Contact	The contact of the record.
Owner	The owner of the record.
Licensed Professional	The public user who has the same license number relating to the record. If you mark this option, you can further select the licensed professional types in the Specific Licensed Professional column.

**List 2: ACA User Role Definitions (Continued)**

Role Name	Description
Registered Users	The public user with an ACA registered account, which includes all registered non-licensed professionals and registered licensed professionals, and does not include anonymous users.
Record Creator	The public user that created the record in Civic Platform. <b>Note:</b> <i>In authorized service, “Agent” and “Agent Clerk” are record creators as well. If you want to restrict agents and agent clerks from accessing a section, you must leave the “Record Creator” option unmarked at the section.</i>
Specific Licensed Professional	The public user that matches a specific licensed professional type. This configuration becomes available after you mark the Licensed Professional check box and click the <b>Configure</b> button. Mark the check box next to a specific licensed professional type to grant access to the record type. Clear the check box to restrict permissions.
Agent	The authorized agent who can manage agent clerks and sell authorized licenses to citizens. An example of the license is fishing and hunting license.
Agent Clerk	The authorized agent clerk that an authorized agent creates in the account management page. Agent clerks can sell authorized service licenses to citizens like the authorized agent.

## Filter Record Search Results

You can define who can search and view the records of the specified record types based on their user role in ACA. See [Figure 54: Filtering Record Search Results](#). This feature filters search results so that ACA only returns records of record type applicable to a public user's role in their search results list. For example, a licensed plumber can perform a search and see only plumbing permits. This filters the result list so the plumber does not have to see electrical permits on the results page.

To begin, decide if you want to set the same permissions for all record types or if you want to define permissions for each record type. Mark the **For All Record Types** option or the **For Each Record Type** option accordingly.

Then you determine who can search and view records of any record types or of a specific record type. Mark the option which reflects this decision in the Filter Record Search Results area. Options include **All ACA Users**, **Registered Users**, **Record Creator**, **Contact**, **Owner**, and **Licensed Professional**. If you want to set configuration for a specific type of Licensed Professional, you must mark the **Licensed Professional** option and click the **Configure** button in the **Specific Licensed Professional** column. This opens a Licensed Professional type pop-up window where you can define permissions and restrictions accordingly.

**Figure 54: Filtering Record Search Results**

Filter Record Search Results

Restrict who can view records in the record search for this module: Choose among Anonymous Users, Registered Users, Record Creator, Contact, Owner, Licensed Professional, and Specific Licensed Professional.

For All Record Types  For Each Record Type

Record Type	All ACA Users	Registered Users	Record Creator	Contact	Owner	Licensed Profes...	Specific Licensed Pro
AGIS building permit	<input checked="" type="checkbox"/>						
AVR Test Application	<input checked="" type="checkbox"/>						
All Categories-Residential	<input type="checkbox"/>						
AMCA Inspection Demo	<input checked="" type="checkbox"/>						
AMS/MM/MM/MM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ASI Renewal	<input type="checkbox"/>						
AutoAssignInspector	<input type="checkbox"/>						

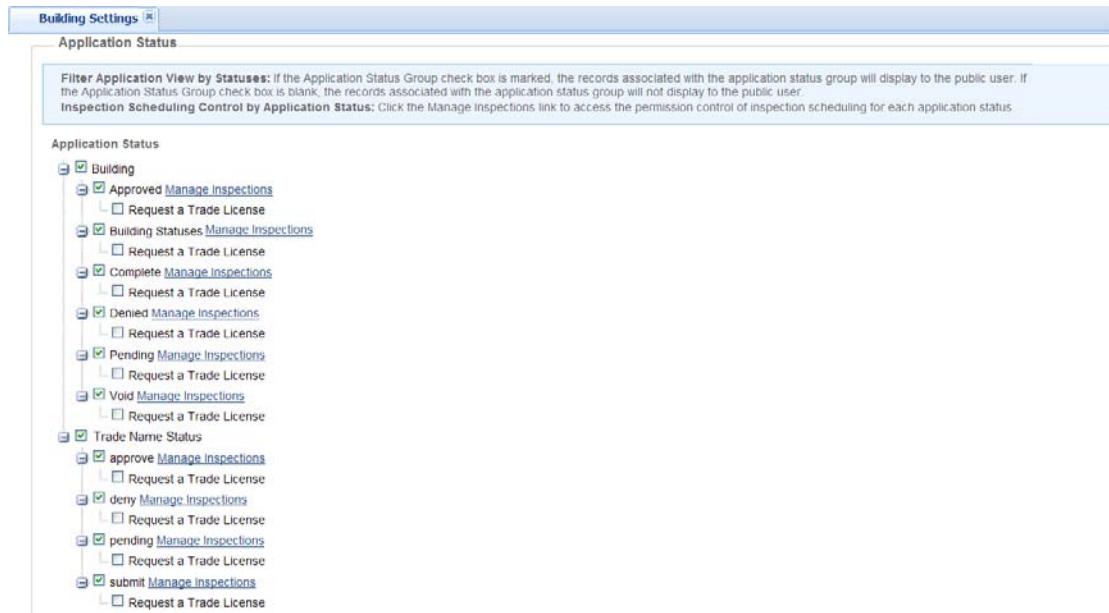
OK  Cancel

## Application Status

The Application Status section on the ACA Admin Module Settings page displays a tree view populated with the Application Status Group. See [Figure 55: Application Status](#). Expand the tree. You view a list of all application status groups for any of the records in the module. Use this feature to limit the display of records of a certain status in search results, or to restrict inspection scheduling permissions to any public users for certain inspection type when the record is of certain status. Also this feature can enable the "Trade License/Approval" link for records of certain status. This feature does not apply to the record statuses that are created by workflow task and not included in the application status. For more information about application status group, see "Working with Application Status Groups" in the "Record Types" chapter in the *Accela Civic Platform Administrator Guide*.

### Topics

- [Filtering Applications by Status](#)
- [Inspection Scheduling Control by Application Status](#)
- [Enabling Trade License Link per Application Status](#)

**Figure 55: Application Status**

## Filtering Applications by Status

You can determine what statuses of records can be displayed in the search results lists by marking the check boxes next to the statuses in each application status group. Clearing the check boxes next to the statuses prevents the records of those statuses from displaying in the search result lists.

**Note:** A helpful tip is when configuring this feature is to think about what statuses you want to hide from public user view in an application status group. For example, restrict applications with the Void status by clearing the Void check box.

### To filter applications by status

1. Navigate to **Module > Module Settings > Application Status**.
2. Expand the navigation tree for an application status group.
3. Do any of the following:
  - Mark the check boxes next to each status of which you want to display the records to the search results lists.
  - Clear the check boxes next to the statuses if you do not want the records of those statuses to display in the search results lists.
4. Repeat steps 2 and 3 for each application status group.

5. Click the **Save** button.

## Inspection Scheduling Control by Application Status

In this feature you can control whether public user can schedule or request an inspection of certain inspection type when record is of certain status. For example, you can restrict public user from scheduling inspections for the inspection type of Compliance Review when the record is of Approved status. In order for this configuration to take effect, you must set the inspection scheduling actions to display in ACA for the desired inspection type in the associated calendar in Civic Platform. Inspection scheduling actions include Request, Schedule, Reschedule, and Cancel. For more information on the inspecting scheduling control, see “Configuring Citizen Access Inspection Calendars” in the “Inspection Calendars” section of the *Accela Civic Platform Administrator Guide*.

### To control the inspection scheduling actions

1. Navigate to **Module > Module Settings > Application Status**.
2. Expand the navigation tree for an application status group.
3. Locate an application status and click the **Manage Inspections** link next to it.

*Citizen Access displays an Inspection Group drop-down list with the inspection groups that relate to the inspection status group and a form of Permission Assignment for Inspection Types.*

Application Status

Filter Application View by Statuses: If the Application Status Group check box is marked, the records associated with the application status group will display to the public user. If the Application Status Group check box is blank, the records associated with the application status group will not display to the public user.  
Inspection Scheduling Control by Application Status: Click the Manage Inspections link to access the permission control of inspection scheduling for each application status.

Application Status

DEV\_PERMIT1

- Approved [Manage Inspections](#)
- Expired [Manage Inspections](#)
- Finalized [Manage Inspections](#)
- Issued [Manage Inspections](#)
- Pending [Manage Inspections](#)
- Void [Manage Inspections](#)
- Withdrawn [Manage Inspections](#)

Inspection Group

Alcohol District Check

Permission Assignment for Inspection Types

Inspection Type	Request/Schedule	Reschedule	Cancel
195 Distance Inspection	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**OK** **Cancel**

4. Select an inspection group from the **Inspection Group** drop-down list.

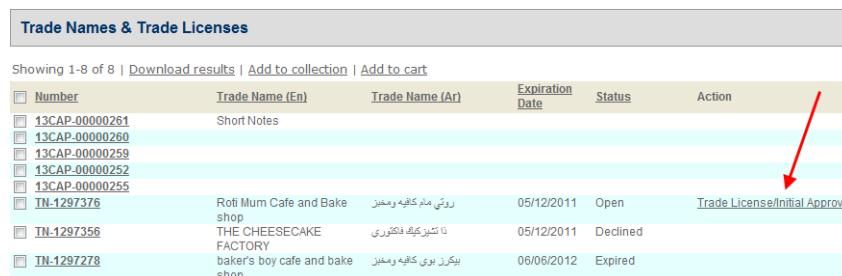
*Citizen Access displays a list of inspection types to the form of Permission Assignment for Inspection Types, as shown in the figure above. By default, all the actions are selected for each inspection type.*

5. Mark the check boxes for the actions for each inspection type to allow public users to perform the actions for the inspection type when the record status is the one next to the **Manage Inspection** link you clicked in the Application Status tree. Clear the check boxes to restrict the actions.
6. Repeat **step 2** to **step 5** to configure the inspection scheduling actions for each inspection type in each application status.
7. Click the **Save** button.

## Enabling Trade License Link per Application Status

If a license application reaches certain status, you may want to provide the "Trade License/Initial Approval" link for public users to quickly access the trade license request page.

**Figure 56: Trade License/Initial Approval Link on Record Page**



Trade Names & Trade Licenses					
Showing 1-8 of 8   Download results   Add to collection   Add to cart					
<input type="checkbox"/>	Number	Trade Name (En)	Trade Name (Ar)	Expiration Date	Status
<input type="checkbox"/>	13CAP-00000261	Short Notes			
<input type="checkbox"/>	13CAP-00000260				
<input type="checkbox"/>	13CAP-00000259				
<input type="checkbox"/>	13CAP-00000252				
<input type="checkbox"/>	13CAP-00000255				
<input type="checkbox"/>	TN-1297376	Roti Mum Cafe and Bake shop	روتی مام کافیه و مکن	05/12/2011	Open
<input type="checkbox"/>	TN-1297356	THE CHEESECAKE FACTORY	ناچیز کیک فاکتوری	05/12/2011	Declined
<input type="checkbox"/>	TN-1297278	baker's boy cafe and bake shop	بیکرز بوی کافیه و مکن	06/06/2012	Expired

To display the Request a Trade License option in the Application Status section, you must configure the Standard Choice ACA\_CONFIGS with the DISPLAY\_REQUEST\_TRADE\_LICENSE\_FILTER Standard Choice value. For more information on working with Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

### To enable Trade License link per application status

1. Navigate to **Module > Module Settings > Application Status**.

- Click the + next to an application group status, for example, Trade Name Status.

*Citizen Access expands all the included statuses.*

The screenshot shows the 'Application Status' configuration screen. At the top, there is a note about filtering application views by status groups. Below this, a tree view lists various application statuses. The 'Approved' status is expanded, showing its child node 'Request a Trade License'.

- LICENSE STATUS
- Trade Name Status
- Additional Requirements Needed
- Approved
  - Request a Trade License

- Click the + next to a specific status, for example, Approved.

*Citizen Access displays the Request a Trade License option.*

- Mark the option **Request a Trade License** to display the Trade License/Initial Approval link.

## Combine Button with Record Type

You can configure the **Combine Button with Record Type** section on the Module Settings page to determine which record types display the Create Amendment button or Document Delete link on the Record Detail page. See [Figure 57: Combine Button with Record Type](#).

**Figure 57: Combine Button with Record Type**

The screenshot shows the 'Combine Button with Record Type' configuration dialog. It has three main sections:

- Available Record Types (253 items):** A list of record types including Building/Building Permit/Commercial/Mixed Use, Building/Building Permit/Commercial/New, Building/Building Permit/Commercial/Night Cl, Building/Building Permit/Commercial/Restaura, Building/Building Permit/New Building/NeigFe, Building/Building Permit/Permit/Payment, Building/Building Permit/Residential/New, Building/Building Permit/Residential/Outhous, Building/Building Permit/Residential/Parallel, Building/Building Permit/Residential/Single F, Building/Building Permit/Residential/Subdivis, and Building/carryover/carryover/carryover.
- Selected Record Types (5 items):** A list containing 'Building/AC/A/ACA/ASI Expression', 'Commercial Building Permit-All Categories', 'Condo', 'SPEAR Test', and 'Zoning Analysis'.
- Application Status:** A list of application statuses with checkboxes:
  - Building Public User - Elec (checkbox checked)
  - Accepted
  - Applied On-line
  - Fees Pending
  - Issued
  - On Hold
  - Permit Issued
  - Reinspection Required
  - Rejected

At the bottom are 'OK' and 'Cancel' buttons.

### Topics

- [Create Amendment](#)
- [Create Document Delete](#)

## Create Amendment

You can define which record types display the Create Amendment button. This button is used to enable a public user to create an amendment (or child record) from the original parent record and upon doing so, the child record inherits certain information from the original parent record.

If you configure the Create Amendment button to display on all commercial license applications, when the public user accesses his current licenses, he has the option to click the Create Amendment button and create a child record to a parent record. The public user may want to create a child record because they are renewing the existing license or might have an additional license relating to it. For this example, the Record Type filter is configured so that the child record can be a business license renewal, electrical license, plumbing license, or architecture license. When the citizen generates the child record, such as renewal of the business license, the user avoids re-entering personal, business contact, and other information on the child application intake form. This is because the child record (business renewal license) inherits information from the parent record (original business license) and has an association with it.

The user experience changes in two ways after you configure Associating a Button with a Record Type and the Record Type Filter. First, a specialized button displays on the Record detail page on defined Record Types. See [Figure 58: New Button Applied to the ACA Application Intake Form](#). Second, the application intake form displays a filtered list of record types that a user can select to generate a new child record of the that type. See [Figure 59: Filtered Record Types Displayed in the ACA Application Intake Form](#). If, after filtering, only one record type is available for the creation of a child record, Citizen Access automatically assigns that record type as the child record type, skipping the Record Type selection step. For more information about the Record Type Filter section, see [Record Type Filters on page 122](#).

For information on how to implement amendment functionality based on record status, see [Associating a Record Type Filter to the Create Amendment Button on page 575](#) in [Appendix C: Variations for Creating Records on page 527](#).

Figure 58: New Button Applied to the ACA Application Intake Form

The screenshot shows the Accela Citizen Access Application Intake Form. At the bottom left, there is a button labeled "Create Amendment" which is highlighted with a red rectangular border. The form includes sections for "Permit Details", "Inspections", "Processing Status", and "Attachments".

Figure 59: Filtered Record Types Displayed in the ACA Application Intake Form

The screenshot shows the Accela Citizen Access Application Intake Form. A specific list item, "Capital Amendment", is highlighted with a red rectangular border. The page also features a "Select an Amendment Type" section and a "Continue Application >" button at the bottom.

#### To combine a button with a Record Type

1. Navigate to **Citizen Access Setup > Module Settings**.
2. Go to the **Combine Button with Record Type** section of the page.
3. Select a button from the available drop-down list.  
*Citizen Access displays a list of available Record Types and a list of Selected Record Types.*
4. Add records to or remove records from the Selected Record Types list:
  - To add a record to the Selected Record Types list, highlight a record in the Available Record Types list and click the **Add** button.
  - To remove a Record from the Selected Record Types list, highlight the desired record in the Selected Record Types list, and click the **Remove** button.
5. Click the **OK** button.
6. Configure the Record Type Filter.

For configuration instructions, see [Record Type Filters on page 122](#).

## Create Document Delete

You can configure which record types the **Create Document Delete** link displays to public users on an application. This provides an option to restrict this link on record types so public users cannot delete a document attachment from an application. This feature follows the same logic to display or hide the page element on the Record Detail page as described in [Create Amendment on page 119](#). Configure the application status to display the link. See [Defining Document Deletion Permissions on page 341](#). For more information about Document Attachments, see [Document Attachments on page 332](#).

## Record Search

The Record Search section provides configurations to define how you can search for a record between modules, by contact, or by application-specific information. See [Figure 60: Record Search Configurations](#). For complete information on how to implement search functionality, refer to [Chapter 13: Configuring Record Inquiry on page 243](#). See also [Configuring for Record Inquiry on page 206](#) in [Chapter 11: Implementation Planning on page 201](#).

**Figure 60: Record Search Configurations**

The screenshot shows a configuration interface for 'Record Search'. It includes sections for 'Cross Tab Search Settings' and 'Additional Search Criteria Settings'. Under 'Cross Tab Search Settings', there are checkboxes for 'Building', 'Land', 'Trade Name Management', 'Planning', and 'Asset', with 'Building' and 'Planning' checked. Under 'Additional Search Criteria Settings', there are checkboxes for 'Enable Search by ASI' and 'Enable Search by Contact Template', both of which are checked.

### Topics

- [Cross Tab Search Settings](#)
- [Additional Search Criteria Settings](#)

## Cross Tab Search Settings

The **Cross Tab Search Settings** on the Module Settings page provides the configuration to extend a search originally contained within a module to other tabs (modules) enabled for ACA. Mark the check box next to each tab that you want to include in cross tab search functionality. For more information about cross module searches and additional configuration required for setup, see [Configuring Cross Module Searches on page 248](#).

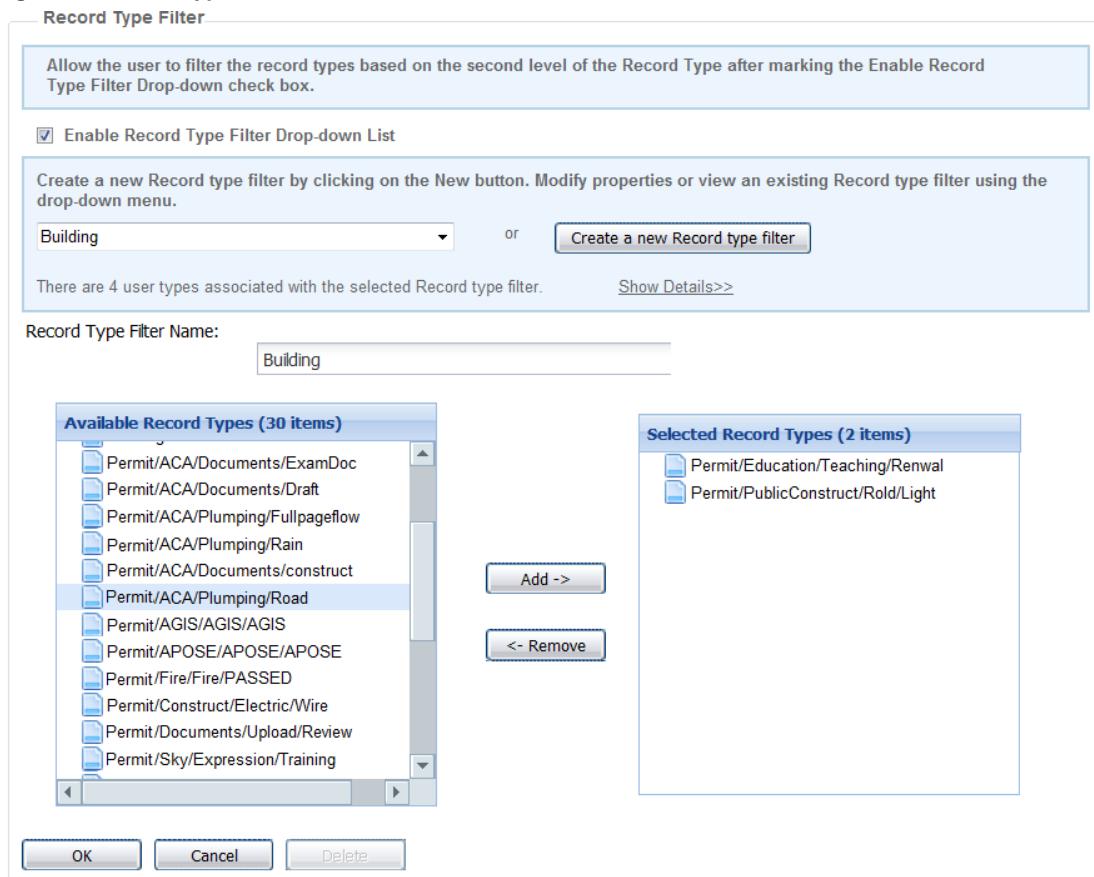
## Additional Search Criteria Settings

This setting controls the availability of the **Additional Search Criteria** link on the Record Home Page for searches that contact template or application-specific information performs. For example, after a user chooses a contact template from the contact search form, he can click the additional search criteria link. Citizen Access displays the related contact template fields, such as SSN or FEIN. The user can then leverage those fields to find associated records.

Mark or clear the appropriate check box to enable searches by ASI or Contact Templates. The check boxes are marked by default. See [Figure 60: Record Search Configurations](#). For more information about configurations related to contact searches, see [Configuring Contact Template Record Searches on page 255](#).

## Record Type Filters

The Record Type Filter section on the Module Settings page allows you to define which record types display in the Record Type Picker page and who have the permission to create records of the record types.

**Figure 61: Record Type Filter**

### Topics

- Enabling Record Type Filter Drop-down List
- Creating or Editing a New Record Type Filter
- Associating a Record Type Filter to a Button
- Associating a Record Type Filter to a Link

## Enabling Record Type Filter Drop-down List

By default, all the filtered record types display in a bulleted list on the Record Type Picker page, which could be a long list and difficult for public users to locate their desired one. If you mark the check box of **Enable Record Type Filter Drop-down List**, the second level (groups) of the standard four-levels of record types displays in a drop-down list on the Record Type Picker page. Upon users selecting a group, if there is only one record type relating to the selected group, Citizen Access will automatically start the page flow for the record type. If there are multiple record types, all the record types display in a bulleted list for selection.

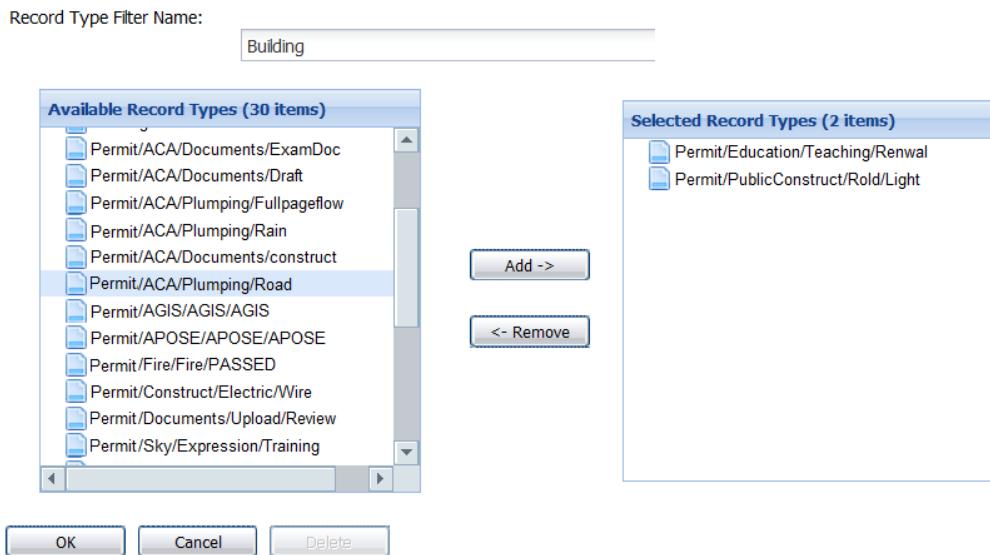
## Creating or Editing a New Record Type Filter

When you create or edit a filter, you firstly select record types, then you grant creating permission to the role groups for each record type. You can associate one record type with one or more filters.

### To configure a Record Type Filter

1. Navigate to **Citizen Access Setup > Module Settings > Record Type Filter**.
2. Click the **Create a new Record type filter** button and designate the name for the new filter.

*Citizen Access Setup displays a list of record types available and a list of record types previously selected as child records.*



3. Add record types to or remove from the Selected Record Types list:
  - To add a record to the Selected Record Types list, highlight the desired record in the Available Record Types list, click the **Add** button.
  - To remove a record from the Selected Record Types list, highlight the desired record in the Selected Record Types list, and click the **Remove** button.

4. Click the **Show Details** link.

*Citizen Access Setup displays a list of selected record types.*

The screenshot shows a configuration dialog for a Record Type filter. At the top, it says "Create a new Record type filter by clicking on the New button. Modify properties or view an existing Record type filter using the drop-down menu." Below this is a dropdown menu set to "Building" with an "or" option and a "Create a new Record type filter" button. A note below says "There are 4 user types associated with the selected Record type filter." There is a "Hide Details" link. The main area lists "Select Record Types" and four categories: "Anonymous", "Registered", "Licensed Professional", and "Specific Licensed Profess...". Under "Permit/Education/Teaching/Renwal", the "Licensed Professional" checkbox is checked and the "Configure" button is active. Under "Permit/PublicConstruct/Rold/Light", the "Specific Licensed Professionals" checkbox is checked and the "Configure" button is active. At the bottom are "OK" and "Cancel" buttons.

5. Mark or clear the check boxes in the list. See [List 3: Role Assignment for Record Type](#).

If you mark the Licensed Professional check box, the **Configure** button becomes active in the Specific Licensed Professionals column.

6. If necessary, click the **Configure** button to define specific licensed professionals with permissions to the record type.

7. Click the **OK** button.

8. Click the **Save** button to save the changes to the Module Settings page.

#### List 3: Role Assignment for Record Type

<b>Anonymous</b>	Public users who access Citizen Access without logging in.
<b>Registered Users</b>	Public users with an ACA registered account. This includes all registered non-licensed professionals and registered licensed professionals.
<b>Licensed Professionals</b>	Public users with a license. This includes all licensed professional types. When you mark this check box, the Configure button becomes available in the Specific Licensed Professional column. This allows you to filter which licensed professionals have access to the record type.
<b>Specific Licensed Professionals</b>	Public users that match a specific licensed professional types. This configuration becomes available after marking the Licensed Professional check box and clicking the Configure button. Mark the check box next to a specific licensed professional type to grant access to the record type. Clear the check box to restrict permissions.

## Associating a Record Type Filter to a Button

To set a Record Type filter to be effective in Citizen Access, you must associate the filter with a link or button that directs users to record creation page or fee estimation page.

The record type filters take effect with the result of only displaying the applicable sub-sets of record types to the public user for selection. When the user clicks a link or button, an event runs in the background to filter the available record types exposed to the user.

For example, your agency may provide various types of licenses and permits to citizens that come into the agency. However, the agency may only provide public users with building permit applications online through ACA. If so, then the filter includes any record type related to building permits and excludes any licensing record types from exposure.

Below is an example demonstrating how to associate a filter to the Create Amendment button for all records in a module that have the Create Amendment button on their Record Detail pages.

**Note:** You can also associate a filter to the Create Amendment button for the records that are of a specified record type and at a specified status. See [Configuring Amendment Record Functionality on page 572](#) in [Appendix C: Variations for Creating Records on page 527](#) for detailed information.

#### Associating a filter to the Create Amendment button

1. Go to **Citizen Access Setup** and select a Module tab.
2. Navigate to the module's **Record Detail** web page.  
*Citizen Access displays the module Record Detail page.*
3. Select the **Create Amendment** button displayed on the Web page.  
*Citizen Access displays the button properties in the right panel.*
4. Go to the **Field Properties** area in the right panel.
5. Click the Record Type Filter **Value** cell and select the record type filter you want to associate to the button from the drop-down list.

The screenshot shows the Citizen Access Record Detail page for a Building Record. The main window displays fields like Applicant, Project Description, and Licensed Professional Owner. On the right, a 'Field Properties' dialog is open, showing a table with columns 'Name' and 'Value'. The 'Record Type Filter' row has a dropdown menu open, showing 'LAND AND WATER ...' as the selected value. An arrow points from the 'Create Amendment' button on the Record Detail page to the 'Record Type Filter' dropdown in the Field Properties dialog.

Name	Value
Default Label	Create Amendment
Button Label	Create Amendment
Record Type Filter	LAND AND WATER ...

6. Click the **Save** button.

## Associating a Record Type Filter to a Link

To set a Record Type filter to be effective in Citizen Access, you must associate the filter with a link or button that directs users to record creation page or fee estimation page.

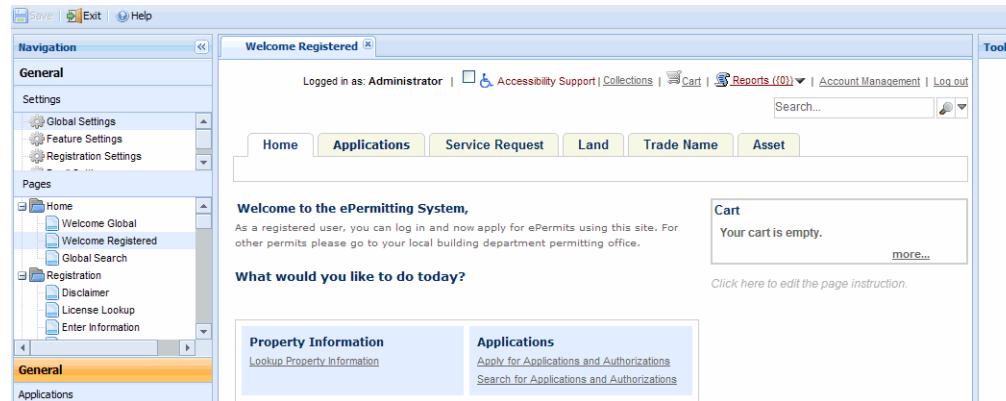
The Record Type filters take effect with the result of only displaying the applicable sub-sets of record types to the public user for selection. When the user clicks a link or button, an event runs in the background to filter the available record types exposed to the user.

For example, your agency may provide various types of licenses and permits to citizens that come into the agency. However, the agency may only provide public users with building permit applications online through ACA. If so, then the filter includes any record type related to building permits and exclude any licensing record types from exposure.

### To associate a record type filter to a link

1. Go to **Citizen Access Setup > General**.
2. In the Pages section, navigate to the **Welcome Registered** page.

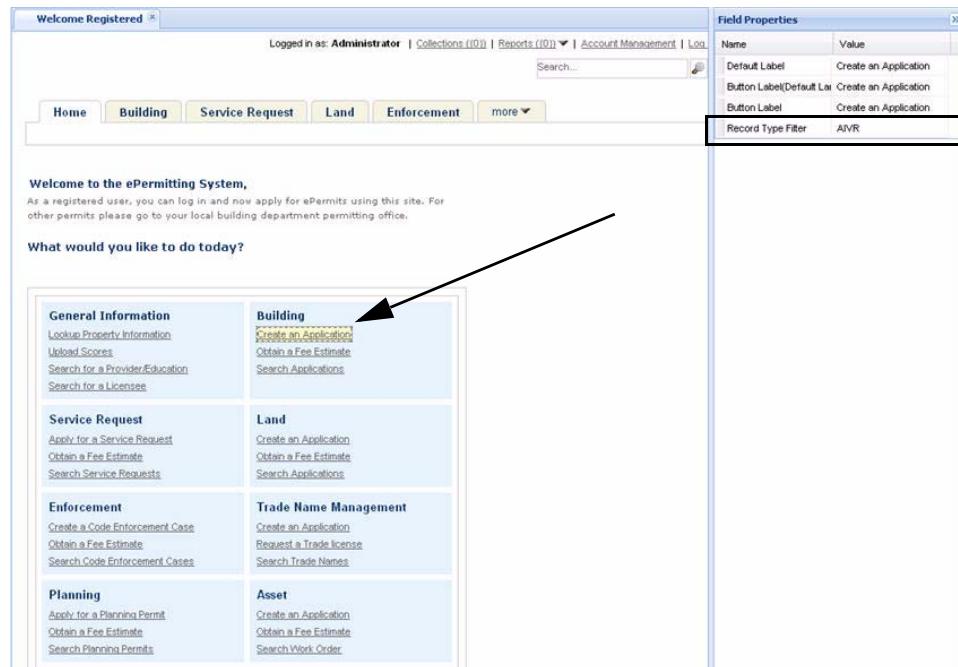
*Citizen Access displays the Welcome Registered page.*



3. Click the link to which you want to associate a Record Type Filter. For example, under the "What would you like to do today" section, select **Create an Application**.

*Citizen Access displays the Field Properties tool.*

4. Go to the **Field Properties** area in the right panel.
5. Click the Record Type Filter **Value** cell and select the record type filter you want to associate to the link from the drop-down list.



6. Click the **Save** button.

## Report Display Controls

The Report Display Controls section of the Module Settings page allows you to define permissions for who can view reports from the Reports link on all pages in the module. This section displays a list of available reports with check boxes associated with each type of user. See [Figure 62: Report Display Controls](#). Mark the check box to grant access to view the reports. Clear the check box to restrict the user from viewing the report.

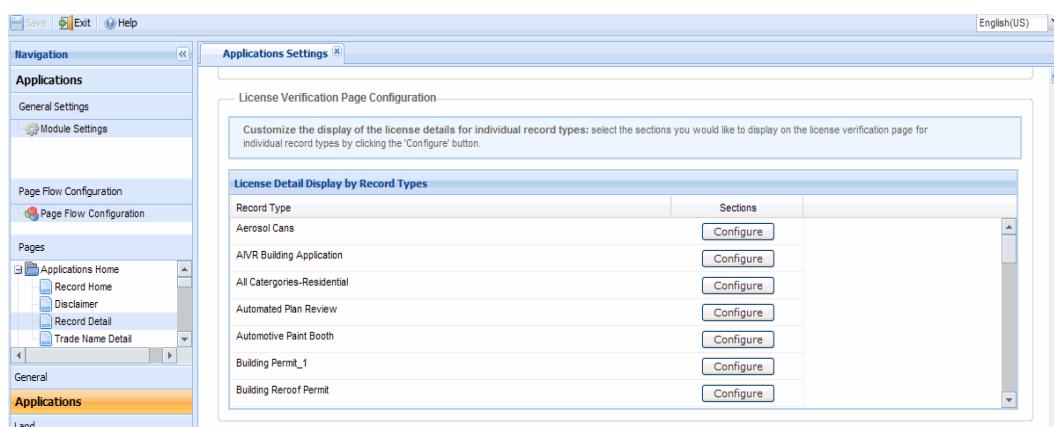
**Figure 62: Report Display Controls**

# License Verification Page Configuration

The License Verification Page Configuration provides the configuration settings to help customize the display of the license details for individual record types. To specify a license verification section for a module, you must configure the record type for this module. The configuration allows you to make these sections available: Select All, Related Records, Education, Continuing Education, Examination, Public Documents.

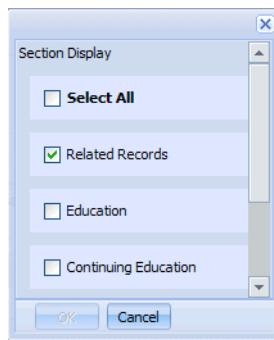
## To verify license configuration

1. Go to **Citizen Access Setup** and select a Module tab.
2. Navigate to the module's **Record Detail** Web page.  
*Citizen Access displays the module Record Detail page.*
3. Scroll to the License Verification Page Configuration section.



4. To change the column display order, click the down arrow. You can sort and filter the column headings.
5. To customize the display of the license details for individual record types, click the respective **Configure** button.

*The Section Display popup window displays.*



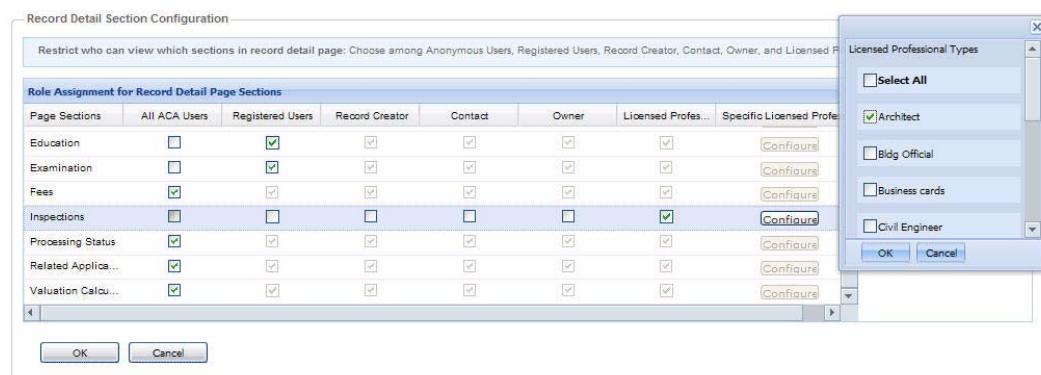
6. Mark the sections, and click the **OK** button.

## Record Detail Section Configuration

The Record Detail Section Configuration area of the Module Settings page provides the configuration settings to determine what Citizen Access displays to a public user when they navigate to the Record Detail page. There are several page sections with check boxes for each type of user, such as All ACA Users, Anonymous Users, Registered User, Licensed Professional, Authorized Agent, and Authorized Agent Clerk. Mark the check box associated with the Page Section and User Type to grant access for viewing. Clear the check box to restrict the user from viewing the section. For a description of user types, see [List 2: ACA User Role Definitions on page 112](#).

Scroll through the list of all page sections on the Record Detail page and set the permissions. If you want to set configurations for a specific type of Licensed Professional, you must mark the Licensed Professional option and click the Configure button in the Specific Licensed Professional column. This opens a Licensed Professional Type pop-up window where you can define permissions and restrictions accordingly. See [Figure 63: Record Detail Section Configuration](#).

**Figure 63: Record Detail Section Configuration**



## Social Media Settings

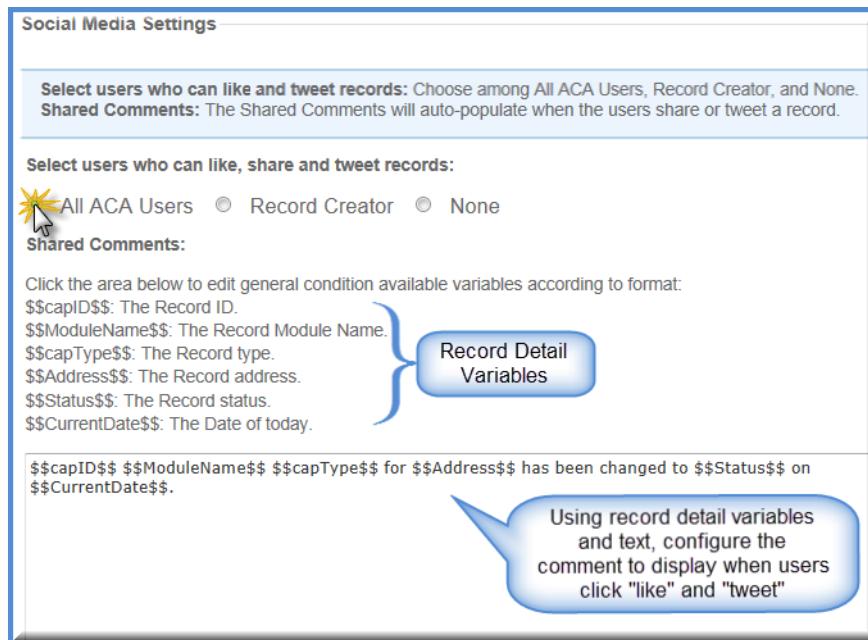
Because the Citizen Access web server uses TinyURL functionality in social media integration, you must ensure that the web server can successfully connect to [www.tinyurl.com](http://www.tinyurl.com) before you enable the social media feature.

The Social Media Settings section of the Module Settings page allows you to define who has the ability to “like” and “tweet” records. For more information about social media integration, see the “Social Media Integrations” chapter in the *Accela Civic Platform Administrator Guide*.

### To configure social media Settings

1. Navigate to **Module Settings > Social Media Settings**.
2. Choose which users can “like” and “tweet” records:
  - All Citizen Access Users
  - Record Creator Only

- None
3. Next, configure the comments that display when a user clicks “like” or “tweet” on a record. In the **Shared Comments** field, shown in the sample screen below, construct a brief comment containing the record detail variables and the text that you want to display on user’s Facebook and Twitter pages.



## CHAPTER 9:

# PAGE FLOW CONFIGURATION

For every module enabled for Citizen Access, a Module Settings page and associated Page Flow Configuration page display for you in the navigation panel. For information about tasks associated with the Module Settings page, see [Chapter 8: Module Settings Configuration Page](#). This chapter provides details about the Page Flow Configuration page.

A page flow allows the agency to define the user experience when completing an application in ACA. You define page order and what information or scripts relating to each page. For example, when a user applies for a building permit online, the administrator configures which page displays first, second, third, and so forth until all information about the application is collected and the associated fee is paid. The applicant may provide license information during the application process. You can associate a script to that page during the application process to verify license validity and expiration.

Associate one page flow with at least one record type. A page flow consists of several parts: static pages, steps, dynamic pages, and components. See [Figure 64: Page Flow Configurations](#). The breadcrumbs, which are created based on step configuration, display at the top of each daily ACA page so the user can identify what step they are working on in the page flow process. The last page of the last step is the receipt page and can be used to define the various receipt pages relating to the module page flow. You can also customize each receipt page in the pages area for a module in the navigation panel of Citizen Access Setup. Independent of where the receipt pages are accessed, the customization you apply is retained for the module.

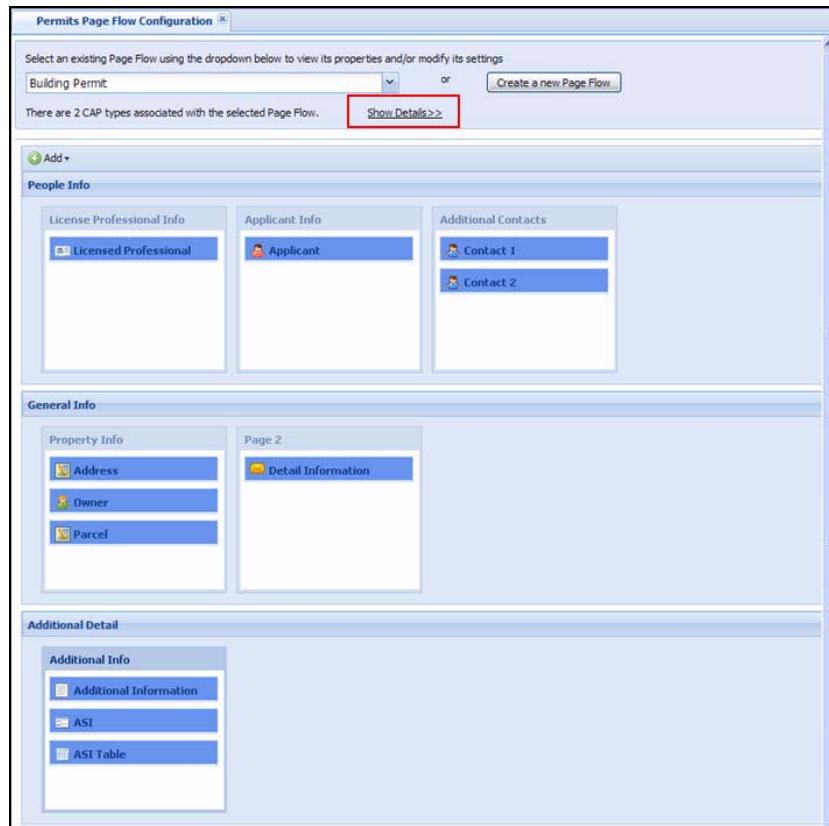
**Note:** *After creating the page flow, you can modify the content on the each page if it requires it. Locate each page in the pages section in the left panel for the module and modify the text as described in Customizing Text on a Web Page.*

## Topics

- [Accessing Page Flow Configuration](#)
- [Understanding Page Flow Basics](#)
- [Associating Record Types With a Page Flow](#)
- [Working with Steps](#)
- [Working with Pages in Page Flow](#)
- [Associating Scripts with a Page](#)
- [Working with Components](#)

- Listing of Components
- Understanding Breadcrumbs
- Configuring the Final Step

Figure 64: Page Flow Configurations

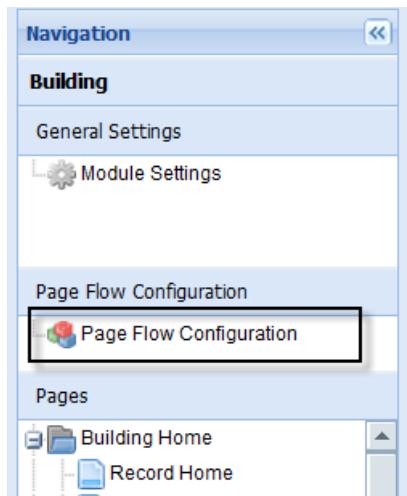


## Accessing Page Flow Configuration

Each module displays a Page Flow Configuration link in the Navigation panel. Click this link to access Page Flow configuration.

### To access the Page Flow Configuration

1. From Navigation panel, click the Module tab associated with the Module that requires Page Flow Configuration.
2. Click the **Page Flow Configuration** tab in the left panel.



## Understanding Page Flow Basics

Assign each record type exposed in ACA to a page flow process, which is the means for an agency to provide services to users through interactive pages designed to collect user information, pay a fee related to the task, and send a confirmation to the user. A Page Flow comprises several parts including: static pages, steps, dynamic pages, script definitions, and components.

Static pages are default Citizen Access pages which are pre-configured constants designated to begin and end all page flow processes. The Disclaimer page and Record-Type Picker page are static pages that define which page flow process the user takes. The Review, Fees, Payment, and Confirmation are static pages which always end a page flow process. The Review page allows a user to click an edit button associated with a section in the page flow, make updates, and immediately return to the Review page. The Fees page only displays if the Record Type has fees associated with it.

Steps are a grouping of one or more dynamic pages, which hold application intake form information. Steps are for creating breadcrumbs, which indicates where the user is in the Page Flow process. The breadcrumb displays the name and number of each step. A Page Flow must have a minimum of 1 step and cannot exceed the maximum number of 10 steps. For more information about steps, see [Working with Steps on page 138](#). For more information about breadcrumbs, see [Understanding Breadcrumbs on page 155](#).

Dynamic pages are customizable and for user information collection and application intake form population in Civic Platform. Each page contains at least one SmartChoice component. You can group dynamic pages together to form multiple steps in a page flow process. You can configure the page title. A Step must contain a minimum of one dynamic page. For more information about pages, see [Working with Pages in Page Flow on page 142](#).

You may have the ability to define scripting information about a dynamic page. When you configure the dynamic page, you can select a script to run Onload event, BeforeButton event, or AfterButton event. For more information about how to associate a script with a page in page flow, see [Associating Scripts with a Page on page 144](#).

A Component is a SmartChoice component directly related with a section of an application intake form. All the components are listed on the right panel where they are selectable for pages. Components are unsearchable, but can shift between pages and steps at any time. For more information about components, see [Working with Components on page 148](#).

In a single page flow, some components can be used multiple times while the others can be used for one time only. For a description of each component, see [Table 5: Page Flow Components on page 151](#). If public users apply for an application that has a component, for example, the Applicant component, used for multiple times in the page flow, only the first applicant is displayed in the Applicant section of the Record Detail page. All other applicants are collapsed under the More Detail button in the Applicant section.

For the components that can be used multiple times, you can configure unique properties each time it is used in a page flow. Every component, except the ASI and ASI Table components, can have its own unique section instructions configured. By default, if you do not set up unique section instructions in the page flow, the section uses the instructions that are configured universally for the section in the <Module> Information page. For how to change section instructions, see [Changing Text and Display with Property Values on page 163](#).

The breadcrumb is used to indicate to a user where he is in the page flow process. It can be used to return to previously completed steps. For more information about breadcrumbs, see [Understanding Breadcrumbs on page 155](#).

## Associating Record Types With a Page Flow

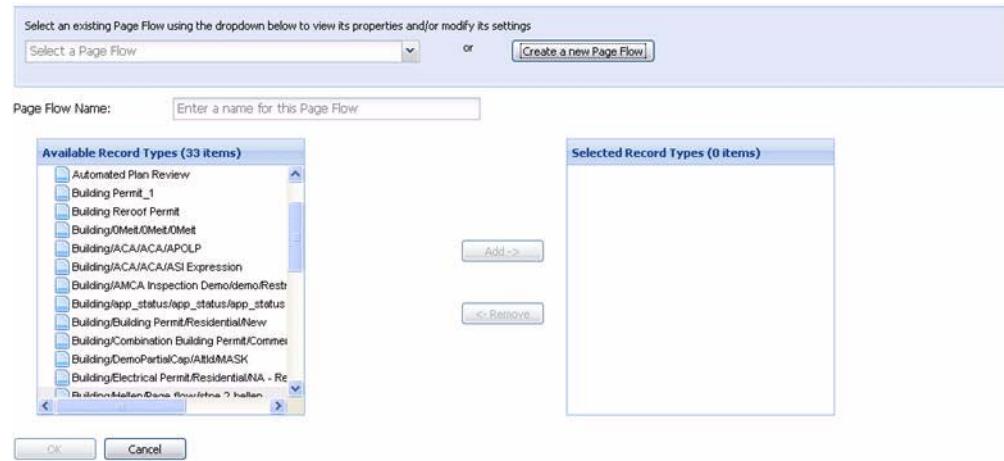
Associate a record type with a page flow, otherwise Citizen Access displays an error message to users when they select it from the Record Type selector. Create a new page flow or update an existing page flow to include one or more record types.

### To associate a record type with a page flow

1. Go to a module and click the Page Flow Configuration tab to access the modular Page Flow configuration screens.  
*Citizen Access Setup displays the Page Flow configuration page.*
2. Choose one of the following options
  - Create a new page flow.

- 1) Click the **Create a New Page Flow** button.

*Citizen Access Setup displays the New Page Flow page.*



- 2) Type a name for the Page Flow in the Page Flow Name Input field.

- Update an existing page flow.

- 1) Choose a page flow from the Page Flow drop-down list.

*Citizen Access Setup displays the Page Flow Steps with a message of how many record types are associated with the flow.*

The screenshot shows the Citizen Access Setup interface for Page Flow Configuration. It consists of three main sections:

- Step 1:** A dropdown menu titled "Select an existing Page Flow using the dropdown below to view its properties and/or modify its settings" with "BUILDING" selected. Below it is a button "Create a new Page Flow". A message "There are 5 Record types associated with the selected Page Flow." is displayed, with a link "Show Details >>".
- Step 2:** Titled "LICENSED PROFESSIONAL". It shows a list of record types: "Owner", "Contact List", and "Licensed Professional".
- Step 3:** Titled "Step 2". It shows a list of components for "Page 1": "ASI" and "ASI Table".
- Step 4:** Titled "Step 3". It shows a list of components for "Page 1": "Attachment".

- 2) Click the **Show Details** hyperlink to view the list of record types associated with the page flow.
- 3) Click the **Modify Record Association** button to add or remove record types associated with the page flow or click the **Hide Details** hyperlink to return to the Page Flow customization screens.

The screenshot shows the "Modify Record Association" screen. It includes the following elements:

- A dropdown menu "Select an existing Page Flow using the dropdown below to view its properties and/or modify its settings" with "BUILDING" selected, and a "Create a new Page Flow" button.
- A message "There are 5 Record types associated with the selected Page Flow." with a link "[Show Details](#)".
- A table showing the current associations between CAP Name and ACA Alias:

CAP Name	ACA Alias
Building/ACA/ACA/ASI Expression	Building/ACA/ACA/ASI Expression
Building/Electrical Permit/Residential/Office	Building Permit_1
Building/ST-ADDRESS/ST-ADDRESS/ST-ADDRESS	Building/ST-ADDRESS/ST-ADDRESS/ST-ADDRESS
Building/InspDemo/InspDemo/InspDemo	Building/InspDemo/InspDemo/InspDemo
Building/wendy/wendy/wendy	Building/wendy/wendy/wendy

- A button "Modify Record association".

3. Define which record types are associated with the page flow.

- Select the record type you want to add to the page flow from the Available Record Type window and then click **Add** to move it to the Selected Record Types box.

- Select multiple record types at a time by clicking Record Types while pressing the Ctrl key. Drag and drop the list of selected record types to the Selected Record Types box.
  - If you move a record type to the Selected Record Type box in error, click to select the record type and then click the **Remove** button.
4. Click **OK** to save the page flow and associated record types.

## Working with Steps

Steps are one of the most vital components of the page flow process for two primary reasons: they hold dynamic pages with SmartChoice component information and are the key items used to display breadcrumbs to the public user. Each step name and associated step number are displayed in the breadcrumbs, which is used to indicate where a user is in the page flow process. See [Figure 65: Breadcrumbs](#). A page flow is configured to hold a maximum of ten steps.

Select a page flow and customize by doing one of the following four options: Add a Step, Name a Step, Move a Step, or Delete a Step. The last step in the page flow is the receipt page. You can access the various receipt pages from this step and customize them for the module. For more information, see [Defining the Receipt Page on page 157](#).

### Topics

- [Adding a Step](#)
- [Naming a Step](#)
- [Moving a Step](#)
- [Deleting a Step](#)

## Adding a Step

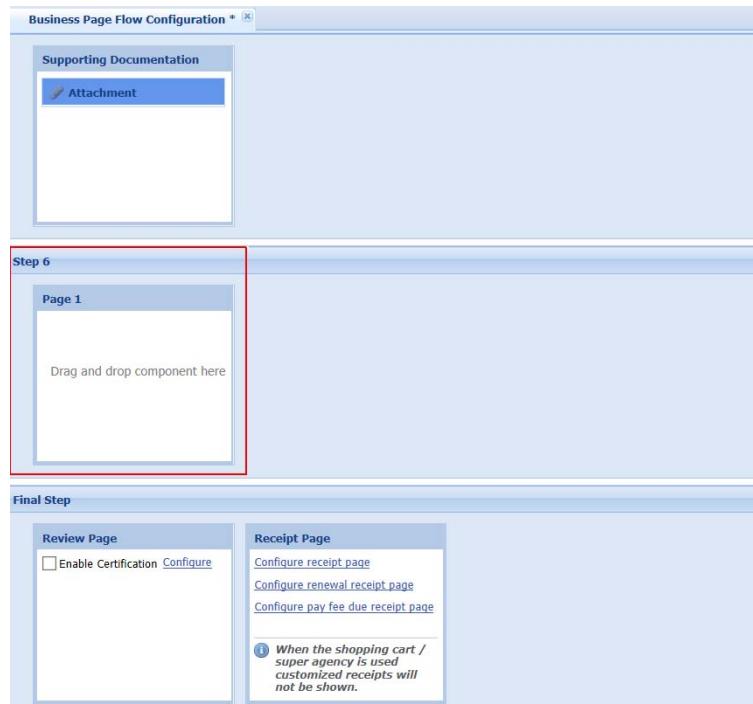
Add steps to the page flow to customize the display of components during the application intake process.

### To add a step to a page flow

1. Navigate to the page flow you want to customize.

2. Click the **Add** button and choose **Add New Step** from the drop-down list.

*Citizen Access adds a new step with a blank page before the Final Step.*



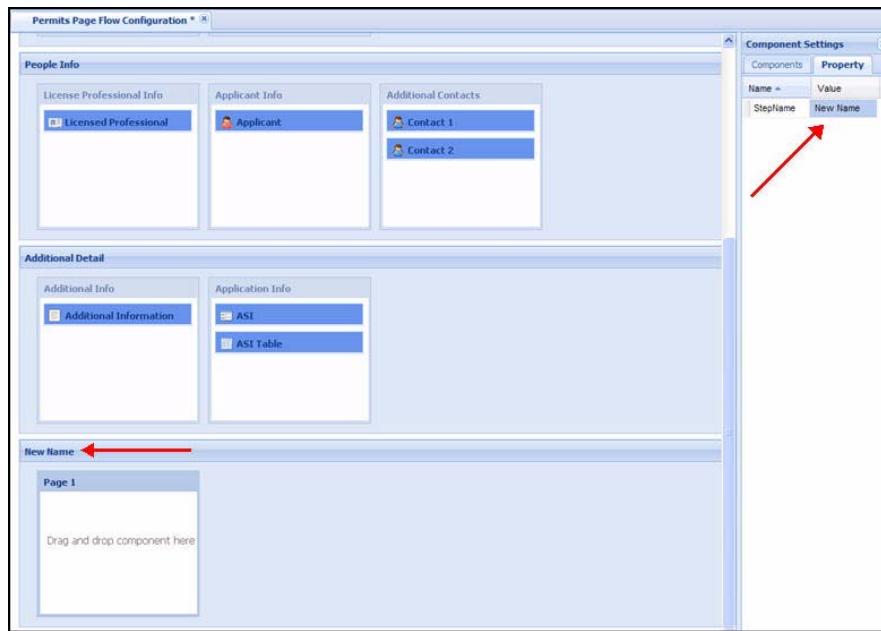
3. Add components to the page as described in [Working with Pages in Page Flow on page 142](#). For more information about components, refer to [Appendix B: Features Requiring Interface Implementations on page 501](#).

## Naming a Step

Change the name of a step at any time. This is useful when you want to customize the name of the page description in the breadcrumbs.

### To name a step

1. Select the step by clicking the step name.
2. Verify the Property tab is selected in the Component Settings right panel.
3. Provide the new step name in the Step Name Value cell.



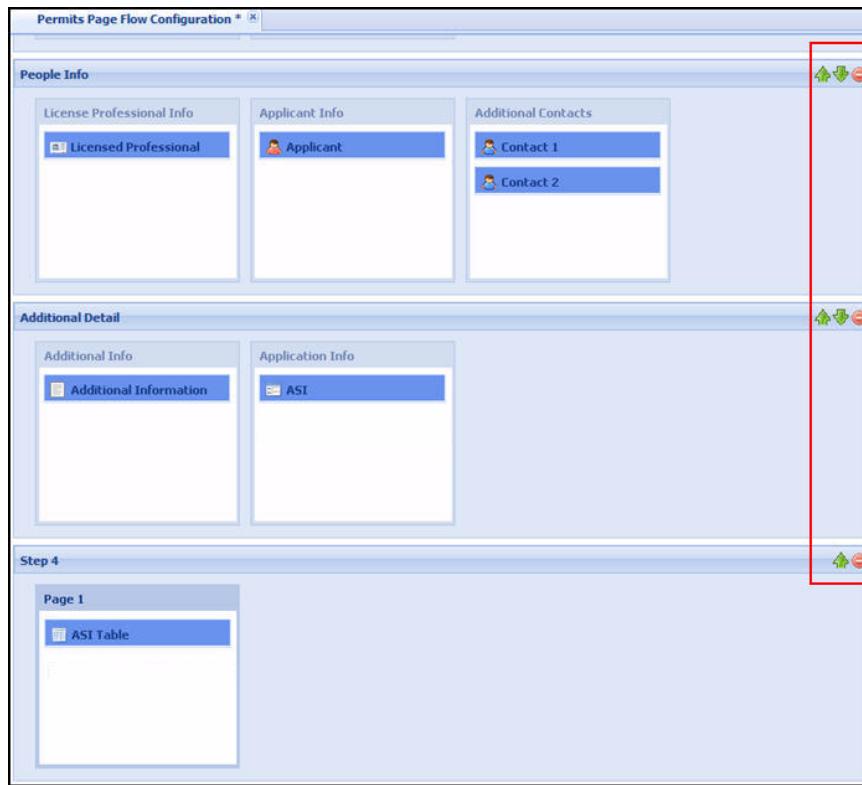
## Moving a Step

You can move steps to customize the order of page and component display.

### To move a step

1. Locate the green arrow(s) associated with the step that you want to move.

You may have to scroll the center workspace to the right for the arrows to come into view.



2. Click the green arrows to move the corresponding step up or down in Step sequence in the page flow process.

## Deleting a Step

Delete a step at any time. This may be useful when you want to remove components from the page flow or include those components with a different step.

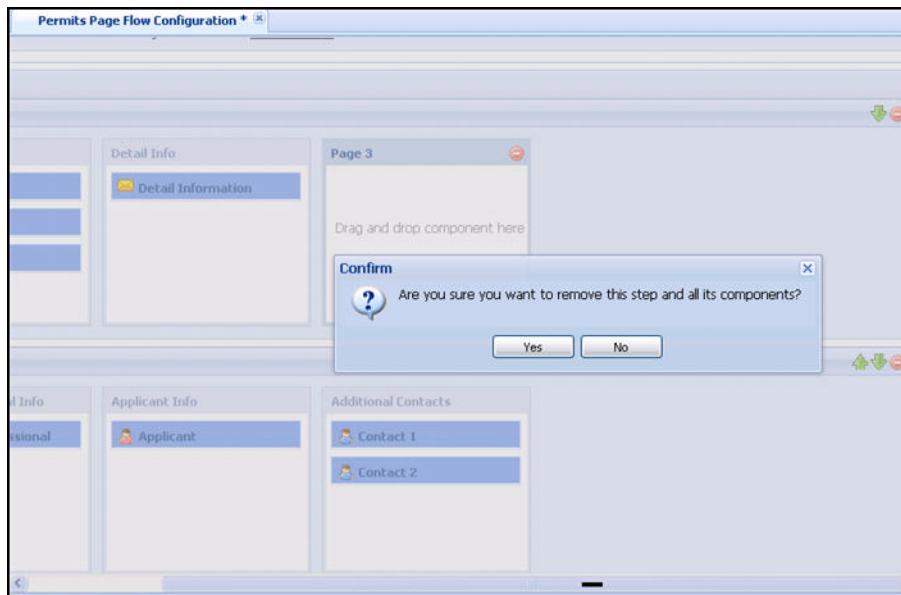
### To delete a step

1. Locate the delete icon, the red circle, associated with the step.

You may have to scroll the center workspace to the far right for it to come into view.

2. Click the delete icon to remove the step from the page flow.

*Citizen Access Setup displays a pop-up window with the question, “Are you sure you want to remove this step and all of its components?”*



3. Click either **Yes** to delete the step or **No** to cancel.
4. Click the **Save** button.

## Working with Pages in Page Flow

The page flow process contains two types of pages: Static and Dynamic. The only pages which require administrative configuration are dynamic pages. These pages are used to collect and populate user information into the application intake form. This is done by adding at least one SmartChoice component to each page. Multiple pages can be grouped together to form a step or multiple steps in a page flow. Customize the name of the page and apply components to create a step and page flow that functions effectively for the record type. Select a step from the page flow and choose one of the following five page options: adding, naming, moving, associating scripts with a page, or deleting a page. The last step in the page flow is the receipt page. You can access the various receipt pages from this step and customize them for the module. For more information, see [Defining the Receipt Page on page 157](#).

### Topics

- [Adding a Page](#)
- [Naming a Page](#)
- [Moving a Page](#)
- [Associating Scripts with a Page](#)
- [Deleting a Page](#)

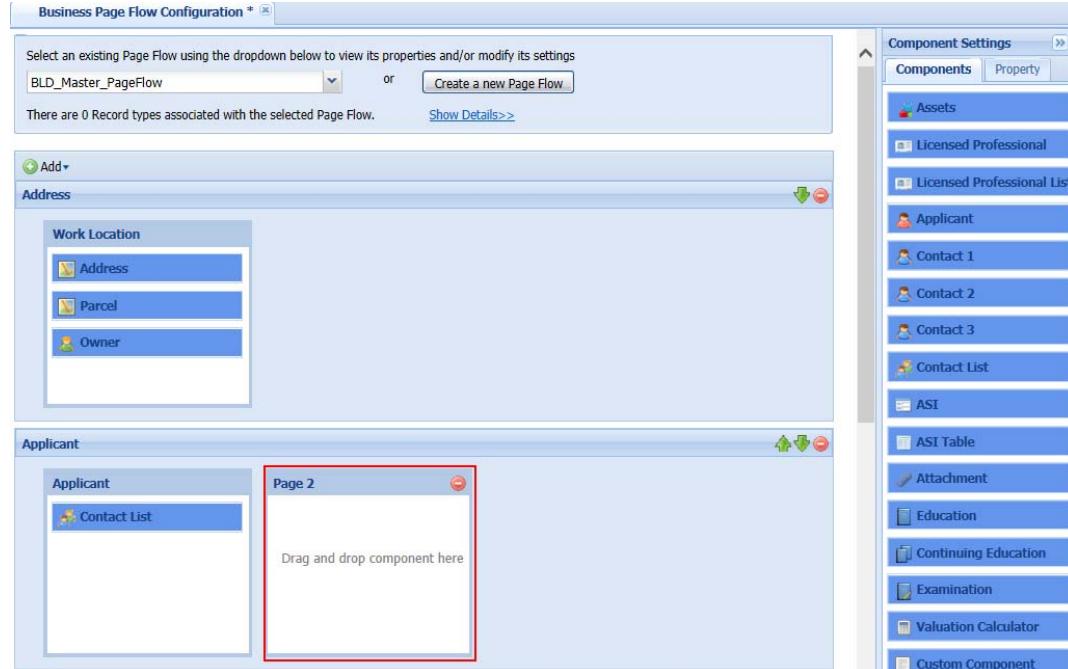
## Adding a Page

Add pages to a page flow to create the presentation of component information during the user experience of the application process.

### To add a page

1. Click to select the step to which you want to add a page.
2. Click the **Add** button and choose **Add New Page** from the drop-down list.

*Citizen Access Setup displays a new blank page on the step.*

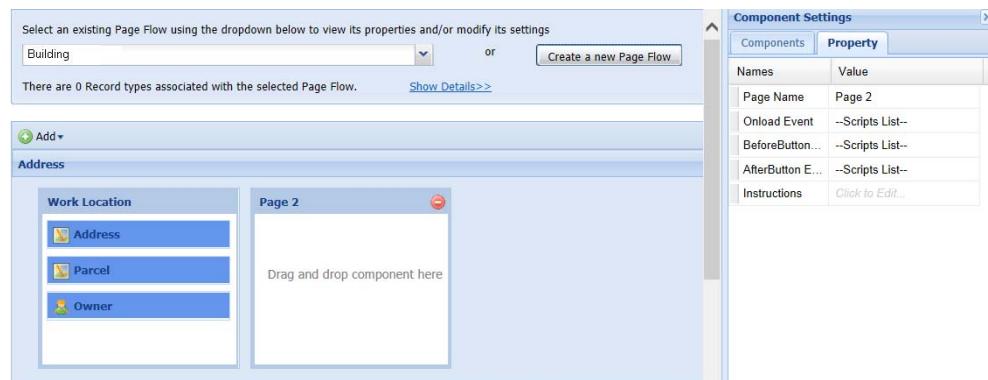


## Naming a Page

Name or rename a page to clarify the presentation of information during the user experience.

### To name a page

1. Click to select the page which requires a new name or a name change.
2. Verify the **Property** tab is displayed in the **Component Settings** right panel.
3. Enter the new name for the page in the **Page Name** Value cell.



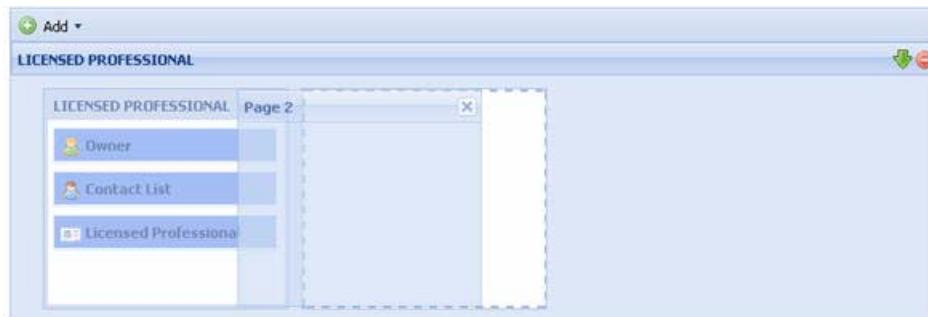
4. Click the **Save** button.

## Moving a Page

Move pages within a page flow to create the desired application user experience.

### To move a page

1. Click to select the page you want to move.
2. Drag and drop the page to reflect the correct page order within the step.



**Note:** You cannot move a page from one step to a different step. You must add a page to the correct step and then drag and drop the page flow components from one page to the other. For more information about moving components, see [Working with Components on page 148](#).

3. Click the **Save** button.

## Associating Scripts with a Page

Citizen Access provides a way to trigger specific EMSE scripts as the user enters data and moves from page to page in the application process. You must have the parameters defined for

what action the EMSE script performs. This is particularly effective when it comes to providing public users with the ability to begin the creation of a record and then step away from the process to resume at a later time or date. When a public user starts and stops an application, Civic Platform creates a partial record. If you define specific scripts to run in coordination with pages, you eliminate the need to wait until an application is submitted or completed for events to fire.

For example, a plumber adds their license information during the application process for a plumbing permit and clicks the Continue button to move to the next page. Before the next page loads, an EMSE script (OnLoginBefore or OnLoginAfter) is fired to verify the license validity and expiration date at an external state government office.

Another example, a citizen enters address information on a web page in the application process and clicks the Continue button to move to the next page. Before the next page loads, Civic Platform runs a script behind the scenes to auto populate data on the next page to display relevant record types.

Another example, in the application process for a barber shop license, a public user selects the type of business (partnership, corporation, and sole proprietor) on the Applicant page, and clicks the Continue button to move to the next page. Before the next page loads, an EMSE script is fired to decide what the next page is based on the selected type of business. For example, if the public user selects "partnership", the next page is the Partner List page; if he selects "corporation", the next page is the Corporate Officer List page.

In order to define a script on a page, you must navigate to the properties section for a page in the page flow and select an EMSE script and a corresponding time to run it. You can choose to run the script Onload event, BeforeButton event, or AfterButton event. Onload event runs before anything loads on a page or user sees the page. BeforeButton event runs after a button is clicked on the page, but before the data entered or changed is saved to the database. The AfterButton event runs after the data is saved.

You can use a script to hide a page or direct public users to a specific page in a specific step according to the data that the users entered on a previous page. To hide a page, you can define a script on the page and select the Onload event. To jump to a specific page based on the data entered on a previous page, you can associate a script to the AfterButton event on the previous page. It is optional for you to use one or both scripts in one page flow. Both scripts are recommended to include the action of clearing the data on the hidden pages, which ensures that public users can successfully modify the application data from the Review Information page or modify some data on a partial application.

**Note:** *The step number indicates the order of a step in the page flow, and the page number indicates the order of a page in the step. In the script to jump to a specific page, specify the page by the step number and the page number, instead of the step name and the page name displayed in the Page Flow Configuration page. This is because the step number and the page number may vary from the step name and the page name, especially when you remove some step or page from the page flow.*

The OnloginBefore and OnLoginAfter EMSE scripts that are used to verify license information during a page flow are bound with the universal ValidateLicense function. For more information about EMSE scripts, please refer to the "Event Manager and Script Engine" chapter in the

*Accela Civic Platform Scripting Guide.* You can also refer to the [Appendix A: Accela Engineering Event Scripts on page 492](#). For more information about license verification, see [Chapter 18: License Verification and Online Renewal](#). For validation of contact information during record creation, see [Setting SSN and FEIN Contact Field Validation on page 241](#).

#### To associate an EMSE script to a page

1. Navigate to **Citizen Access Setup > Modular Tab > Page Flow Configuration**.

*Citizen Access Setup displays the Page Flow Configuration page.*

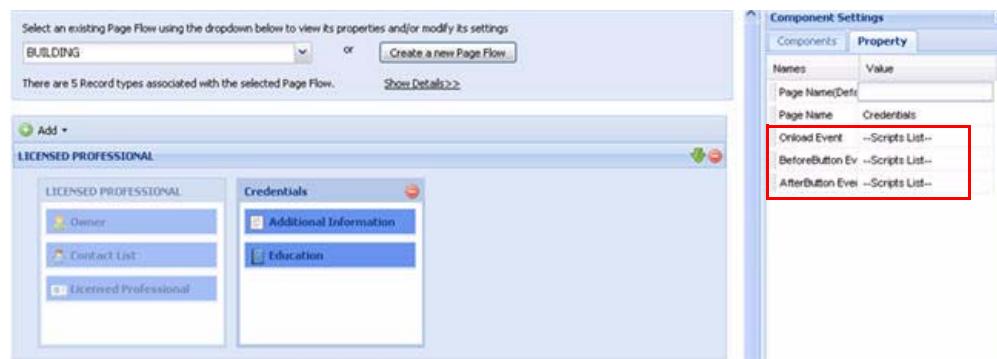
2. Select a page flow code from the drop-down list or create a new page flow.

For information on how to create a page flow, see [Associating Record Types With a Page Flow on page 135](#).

*Citizen Access Setup displays the pages associated with the page flow.*

3. Select a page in the flow.

*Citizen Access Setup displays the Property tab for the page in the right panel with EMSE options.*



4. Use the drop-down lists to select the script you want run Onload event, BeforeButton event, and/or AfterButton event.

5. Click the **Save** button.

## Deleting a Page

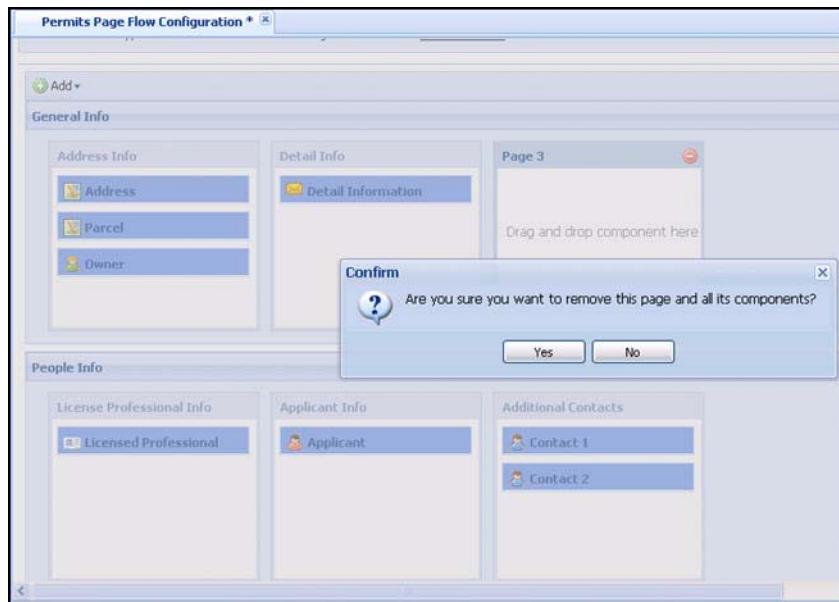
Administrators can delete a page at any time. This may be useful if you want to combine information on a page, thus requiring one to be deleted.

#### To delete a page

1. Click the page name to select the page which requires deletion.

2. Click the delete icon, or red circle, to remove the page from the step.

*Citizen Access Setup displays a pop-up window with the question, “Are you sure you want to remove this page and all of its components?”*



3. Click either **Yes** to remove the page or **No** to cancel.

*If you delete the page from the step, Citizen Access returns the components to the components list.*

4. Click the **Save** button.

## Restricting Licensed Professional Type Options

You can restrict the types of licensed professionals that citizens can add to an application. By limiting the list of available licensed professional types to only those that are applicable for specific record types/page flows, administrators can simplify the application process and prevent errors that would need to be corrected after the application is submitted. This setting resides in the Page Flow properties, so it is applicable for each record type that uses the page flow containing the restriction. This functionality is not available in super agency environments.

Follow the steps below to restrict the licensed professional types that citizens can choose from when completing an application.

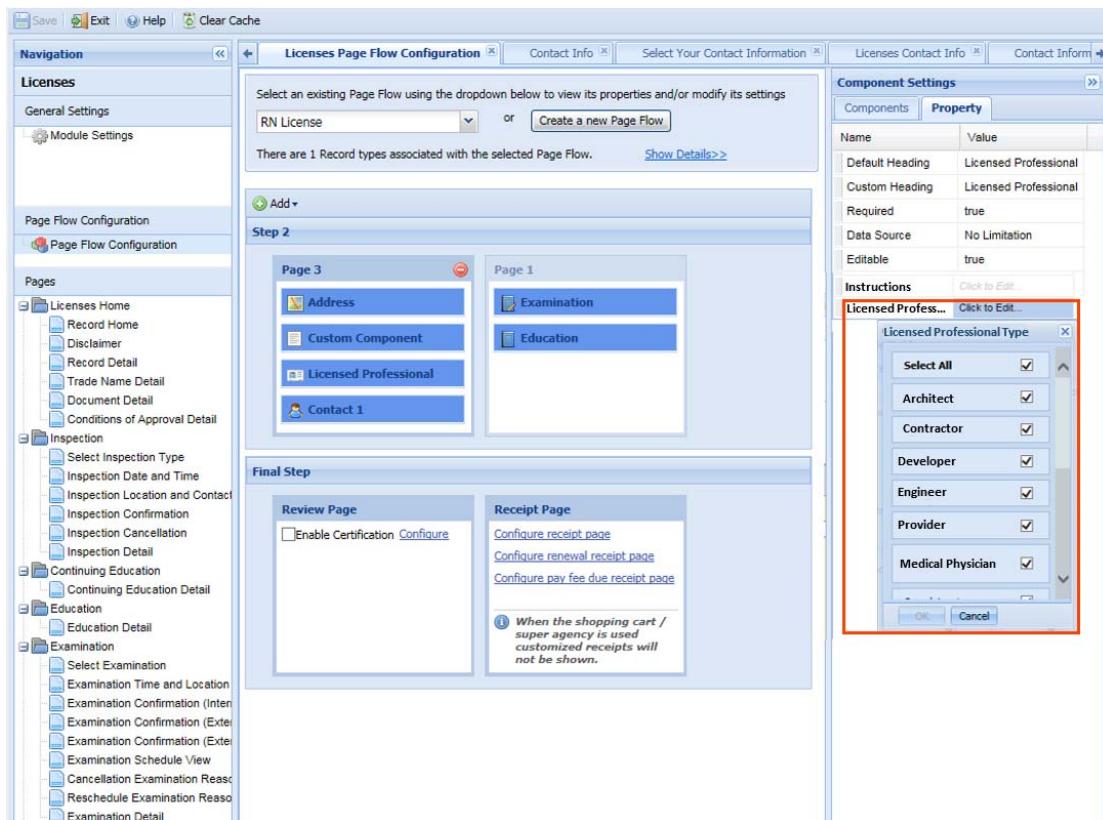
### To restrict licensed professional types

1. Log in to ACA Admin.
2. In the Navigation panel, select the module you want to configure. In this example, Licenses.
3. Click **Page Flow Configuration**.

*The Page Flow Configuration page displays.*

- In the Page Flow, select the **Licensed Professional** component.

*The Component Settings panel displays on the right side of the page.*



- In the **Component Settings** panel > **Property** tab, click **Licensed Professional Types**.

*The full list of licensed professional types displays.*

- Specify which licensed professional types citizens will be able to choose from when completing an application.
- Click **OK**.
- Click **Save**.
- Click **Clear Cache**.

## Working with Components

A Component is a SmartChoice component, which relates to a section of an application intake form in Citizen Access. A list of components display on the right panel where they can be selectable for a dynamic page when a page flow is selected or a new page flow is created. You can drag and drop the desired component to the page and do some settings for it in the Properties panel. See [Table 5: Page Flow Components](#) for a complete listing of components and [Table 6: Components Setting Attributes](#) for a full listing of setting items.

You can select some or all components listed in the Components panel as desired. The Applicant, Contact 1, Contact 2, and Contact 3 components are enabled to show the ASI sub-groups and ASI group for the associated contact type. For information on how to associate these four components with a contact type, see the Custom Heading in [Table 6: Components Setting Attributes on page 153](#). For detailed information on how to associate an ASI group to a contact type, see the Standard Choice CONTACT TYPE in the *Accela Civic Platform Configuration Reference*.

For each added ASI or ASI Table component, you can select a specific sub-group of an ASI or ASI Table group or select an entire group, or leave it blank. The blank ASI or ASI Table component is auto-assigned with the ASI or ASI Table group relating to the record type.

If you add the Contact List component to the page, you can limit the contact types available for public users to choose and set the minimum and maximum number of contacts for each contact type. See [Restricting Contact Types and the Number of Contacts for Contact List Section on page 330](#) for detailed information.

Modify steps and pages in your page flow by adding or deleting components on a page. You can also move components between pages and steps at any time.

**Note:** *You must put APO (address, parcel, owner) component blocks together on the same page if you want APO data to auto-populate for the public user.*

## Topics

- [Moving a Component to a Page](#)
- [Deleting a Component from a Page](#)

## Moving a Component to a Page

### To move a component to a page

1. Click to select a component from the component list or from an existing page.
2. Drag and drop the component into any page located within any step in the page flow.

The screenshot shows the 'Business Page Flow Configuration' interface. At the top, it says 'Select an existing Page Flow using the dropdown below to view its properties and/or modify its settings' with a dropdown menu showing 'BLD\_Master\_PageFlow'. Below that is a message: 'There are 0 Record types associated with the selected Page Flow.' and a link 'Show Details>>'. The main area shows the 'Address' page flow with a 'Work Location' section containing 'Address', 'Parcel', and 'Owner' components. Below that is an 'Applicant' section with a 'Contact List' component. To the right is a vertical 'Component Settings' panel titled 'Components' which lists various components like 'Assets', 'Licensed Professional', etc. A red arrow points from the 'Page 2' component area in the center towards the 'Components' list.

## Deleting a Component from a Page

You can delete a component in either way:

- Drag and drop a component from a page back into the components list in the right panel.
- Right-click the component and click **Remove Component** from the drop-down list.

The screenshot shows the 'Business Page Flow Configuration' interface. At the top, it says 'Select an existing Page Flow using the dropdown below to view its properties and/or modify its settings' with a dropdown menu showing 'BLD\_Master\_PageFlow'. Below that is a message: 'There are 0 Record types associated with the selected Page Flow.' and a link 'Show Details>>'. The main area shows the 'Address' page flow with a 'Work Location' section containing 'Address', 'Parcel', and 'Owner' components. Below that is an 'Applicant' section with a 'Contact List' component. A red arrow points from the 'Page 2' component area in the center towards the 'Components' list.

# Listing of Components

The Page Flow components consist of two types:

- Standard components

A standard component, such as Parcel or Address, is predefined for collecting certain type of information from public users. The standard components are defined in Civic Platform as intake configuration forms.

- Custom component

A custom component displays any content that your agency wants to expose to public users. By default the custom component is blank.

All Page Flow components are listed in [Table 5: Page Flow Components](#). Component properties are listed in [Table 6: Components Setting Attributes](#).

**Related topics:**

- [Implementing Custom Component on page 505](#)
- [Working with Components on page 148](#)
- [Working with Pages in Page Flow on page 142](#)

The following table lists and describes all Page Flow components:

**Table 5: Page Flow Components**

Component	Can Be Used Multiple Times in a Page Flow?	Description
Additional Information		This is for public users to enter information that the U.S. Census Bureau requires in a C404 report. This report, known as the "Report of Privately-owned Residential Building or Zoning Permits Issued", surveys new residential units, additions, and alterations.
Address		This is for public users to enter the address of the primary parcel relating to the application, including a range of street and unit numbers.
Applicant	Yes	This is for public users to enter information about the individual or institution that is submitting the application.
ASI (Application-Specific Information)	Yes	This is for public users to enter specific, or custom, information that your agency requires in addition to default sections of an application. In one page flow, you can use the ASI component multiple times, but you cannot associate multiple ASI components with the same ASI subgroup.
ASI Table	Yes	This displays the ASI Table section that is attached to the ASI in an application for the record type. In one page flow, you can use the ASI Table component multiple times, but you cannot associate multiple ASI Table components with the same ASI Table subgroup.
Attachments	Yes	This is for public users to attach documents, such as building plans or an insurance bond, to a permit application.

**Table 5: Page Flow Components (Continued)**

<b>Component</b>	<b>Can Be Used Multiple Times in a Page Flow?</b>	<b>Description</b>
<b>Condition Document</b>		Shows the required condition documents that the public user must upload. The Condition Document component gets the required document type information via a script. For details, see <a href="#">Appendix G:Configuring the Condition Document Component on page 600.</a>
<b>Contact1</b>	<b>Yes</b>	Use this component only if the Contact List component is not in use in the page flow to allow for more than three contacts.
<b>Contact2</b>	<b>Yes</b>	Use this component only if the Contact List component is not in use in the page flow to allow for more than three contacts.
<b>Contact3</b>	<b>Yes</b>	Use this component only if the Contact List component is not in use in the page flow to allow for more than three contacts.
<b>Contact List</b>	<b>Yes</b>	This component is used when you want to allow for more than three contacts for an application.
<b>Continuing Education</b>		This is for public users to enter information about ongoing professional development that may be required for a Licensed Professional.
<b>Custom Component</b>		You can use this component to display any content that your agency wants to expose to public users. For details, see <a href="#">Implementing Custom Component on page 505.</a>
<b>Detailed Information</b>		You can drag and drop this component to a page where you want the Record Detail data to display on the application.
<b>Education</b>		This is for public users to enter information about an educational program and degree that may be required for a Licensed Professional.
<b>Examination</b>		This is for public users to enter information about the competency exams that may be required for Licensed Professionals to obtain or maintain their license.
<b>Licensed Professional</b>	<b>Yes</b>	This is for public users to enter contractor, architect, engineer, or developer (CAED) information. Usually the state provides this information which includes license number and license type.
<b>Licensed Professional List</b>		This component is used when you want multiple Licensed Professionals for an application.
<b>Owner</b>		This is for public users to enter information about the individual or institution that own the parcel, license, or structure related to the application.
<b>Parcel</b>		This is for public users to enter information about the parcel relating to the application. The County Assessor's Parcel Number (APN) determines the parcel information.
<b>Valuation Calculator</b>		This is for users to calculate job values for an application. A job value is an individual financial assessment that quantifies the work description that an application outlines.

The following table lists all component properties, which can be customized in the **Properties** panel. You can customize a component's title heading and actions. For example, when setting up page flow components, you can require the Licensed Professional component name to be a required field so the user must complete it before moving on to other pages. This way, you can ensure that your agency's reference data populate the Licensed Professional data.

**Table 6: Components Setting Attributes**

Setting Attribute	Meaning
<b>Not Applicable</b>	Indicates that a component cannot be assigned as a required component; component data cannot be validated against your agency's reference data.
<b>Default Heading</b>	This has a corresponding default value which Citizen Access administrators cannot change.
<b>Custom Heading</b>	This field has a value that system administrators can modify. However, system administrators cannot modify Applicant, Contact 1, Contact 2, and Contact 3 components directly. For these four components, they can select a contact type from the value drop-down list and associate a component with it. The selected contact type displays as the section name for the associated component to public users. The CONTACT TYPE Standard Choice Values control these. For information on the Standard Choice CONTACT Type, refer to the <i>Accela Civic Platform Configuration Reference</i> .
<b>Required</b>	When the property is <i>true</i> , it means public users must complete the fields of the component before moving to the next step or page when they reach that component in the application intake form.

**Table 6: Components Setting Attributes (Continued)**

Setting Attribute	Meaning
<b>Data Source</b>	<p>This displays only for the Address, Parcel, Owner, Contact, Contact List, Licensed Professional, and Licensed Professional List components. It defines whether the data must be manually filled or populated with reference data or both.</p> <p>There are three data source options, <i>Reference</i>, <i>Transactional</i>, and <i>No Limitation</i>.</p> <ul style="list-style-type: none"> <li>• <b>Reference:</b> The Search and the Clear buttons display at the bottom of the section in the application intake form. Public users should search the reference data and fill the section with the search results other than manually fill the fields in the section.</li> <li>• <b>Transactional:</b> The Search and the Clear buttons hide from users to prevent users from using reference data. Users must manually enter data for the section.</li> <li>• <b>No Limitation:</b> Public users can either search and populate reference data to the section by using Search functionality or manually fill the section.</li> </ul> <p><b>Note:</b> For the Contact, Contact List, Licensed Professional, and Licensed Professional List components, the Search functionality is also controlled by the settings in the People Search section in the Global Settings page. See <a href="#">People Search on page 69</a> for information on how to set the Search functionality.</p> <p><b>Note:</b> For the Owner component, the Search functionality is also controlled by DISPLAY_OWNER_INFORMATION in Standard Choice ACA_CONFIGS. The Standard Choice setting selectively overrides the Data Source property setting. When DISPLAY_OWNER_INFORMATION is set to No but the Data Source property is set to "Reference" or "No Limitation", the Owner section of the application intake form allows public users to add an owner manually but does not display a Search button.</p>
<b>Contact Type Options</b>	<p>This displays only for the Contact List component.</p> <p>You can specify contact types available for public users to choose and set the minimum and maximum number of contacts for each contact type. See <a href="#">Listing of Components</a> for details.</p>
<b>Editable</b>	<p>When the value is <i>true</i>, it means public users can edit the populated data. However, the modified data is only for the current application's use and does not affect the reference data.</p>
<b>Group</b>	<p>This displays only for the ASI and ASI Table components.</p> <p>All ASI or ASI Table groups, regardless of the ACA Displayable and Status settings in Civic Platform, display as available options in the Value dropdown list. You can do either of the following:</p> <ul style="list-style-type: none"> <li>• Select a group. You can continue to select a specific sub-group for it or, if you want to assign the entire selected group to it, do not select any sub-group.</li> <li>• Leave it blank. The component is auto-assigned with the ASI or ASI Table group relating to the record type.</li> </ul>

**Table 6: Components Setting Attributes (Continued)**

Setting Attribute	Meaning
<b>Subgroup</b>	This displays only for the ASI and ASI Table components. After you select an ASI or ASI Table group, you can continue to select one of its sub-groups to assign it to the component, or you can leave it blank to assign the entire group. Note: A known issue exists. As described in the Group item, a blank ASI or ASI Table component is auto-assigned with all the sub-groups of the ASI or ASI Table group associated with the record type. When a page flow has multiple ASI or ASI Table components, with some blank and some manually assigned with sub-groups. If an auto-assigned sub-group has the same name as a manually-assigned sub-group, the auto-assigned sub-group cannot display, and only the manually-assigned sub-group can display.
<b>Path</b>	This displays only for the custom component. You can display your own custom component to the application intake form by doing one of the following: <ul style="list-style-type: none"><li>• If the component file is directly stored in the .../Customize/UserControls folder under the ACA deployment directory, fill the file name to the Path value. For example, you enter "AgencyCustomCompent.aspx".</li><li>• If the file is stored in a series of folders under the .../Customize/UserControls folder, fill the sub-directory and the file name. For example, you enter "/MyFolder/MySubfolder/AgencyCustomCompent.aspx".</li></ul> For detailed information on how to implement a custom component, refer to <a href="#">Implementing Custom Component on page 505</a> .

## Understanding Breadcrumbs

At the top of each web page, a user views a breadcrumb navigation bar with the name and number of each step. This breadcrumb is used to identify where a user is at in the page flow process. See [Figure 65: Breadcrumbs](#). The current step a user is working on stands out in the toolbar. An active or completed step displays a bold step number. An inactive step displays the Step number in gray. At any time, a user can return to a previous, or active step by clicking the step name or number in the toolbar and the associated page(s) come into view. A user cannot jump forward or skip steps.

The steps created in a page flow can generate breadcrumbs without special configuration. The Review, Fees, Payment, and Confirmation static pages always end a page flow process and display as the last steps in the breadcrumb.

Figure 65: Breadcrumbs

ON-LINE SERVICES

Logged in as: Jason McDonald | Account Management | Logout

Home Property Information Permits Licenses Service Request

Apply for a Permit Obtain a Fee Estimate Search Permits Submit a Plan Check

**Commercial Building Permit-All Categories**

1 General Info 2 People Info 3 Additional Detail 4 Review Information 5 Permit Issuance

**Step 2: People Info > License Professional Info**

\*indicates a required field.

**Licensed Professional**

\*License Type: \*State License Number:  
--select-- 123456978

\*First: Middle: \*Last:  
Jason C McDonald

Name of Business:  
Built to Last

\*Street Address:  
1532 South Green St

\*City: \*State: \*Zip:  
Phoenix AZ 84105

You can configure the Standard Choice Value, EXPAND\_BREADCRUMB\_BAR of the ACA\_CONFIGS Standard Choice to control whether the bars in the breadcrumb in an application page flow automatically collapse when users proceed to subsequent steps. If you set the Standard Choice Value to Y or Yes, the breadcrumb bars always display in the expanded view, as shown in [Figure 66: Breadcrumb Expand View](#). If you set the Standard Choice Value to N, No, or undefined, the breadcrumb bar automatically collapses, as step 1, when the current step is three steps ahead of the step that the bar represents ([Figure 67: Breadcrumb Collapse View](#)).

Figure 66: Breadcrumb Expand View



Figure 67: Breadcrumb Collapse View



## Configuring the Final Step

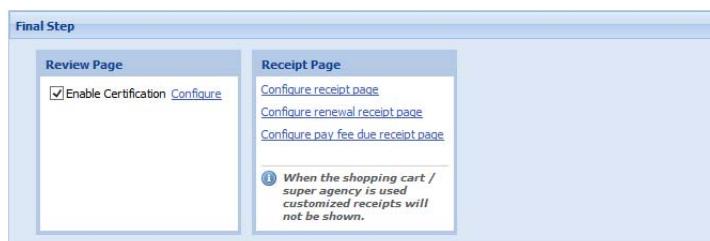
### Topics

- Enabling Certification on the Review Page
- Defining the Receipt Page

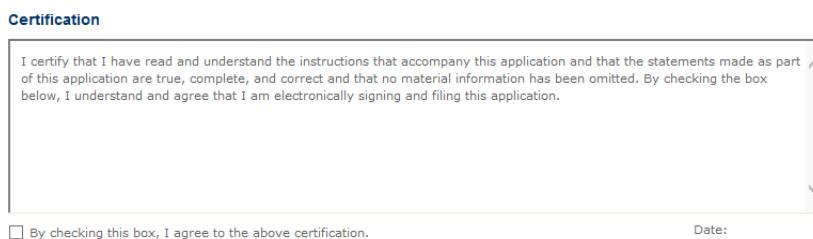
## Enabling Certification on the Review Page

The Review page in the final step provides an Enable Certification option which controls whether a Certification section displays above the Continue Application button in the review page during an application intake process. After you enable the option, you can click the Configure link next to the option to customize the certification statement in the Certification section. See [Figure 69: Configurable Certification Section](#).

**Figure 68: Configurable Review Page**



**Figure 69: Configurable Certification Section**



If you mark the Enable Certification on the review page, when public users arrive at the review page in an application intake form, they must agree with the statement in the Certification section before continuing to the next step. If users click Edit in the review page to make updates, they must re-certify his updates in the review page before continuing to the next step.

## Defining the Receipt Page

The last step and last page in page flow configuration is the receipt page. Each page flow can customize the various receipt pages relating to payment processing for the module. For example, you can customize a renewal receipt to display different content other than a generic receipt or a Pay Fee Due receipt. Access the various receipt pages by clicking on one of the receipt page links in the receipt page step. Citizen Access opens the associated receipt page for customization. For information on how to customize the content on a web page, see [Customizing Texts and Images on Web Pages on page 160](#).

**Note:** *Each module also provides a Pages area in the navigation panel of Citizen Access. If you do not customize the receipt pages in page flow configuration, you can access the receipt pages from the navigation area and modify the content. See [Using the Navigation Panel on page 23](#). Independent of where the receipt pages are accessed, the customizing you apply is retained for the module.*

**To define the receipt page**

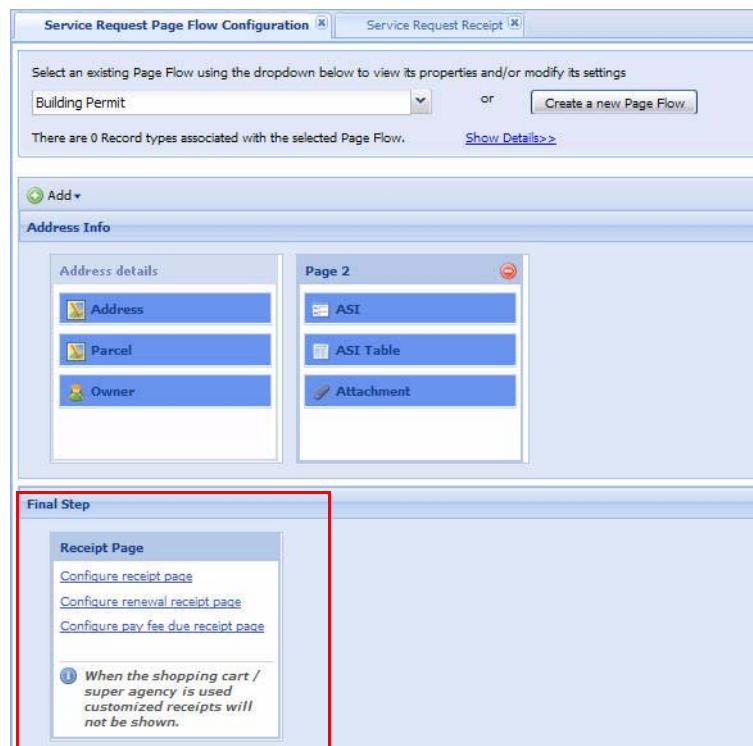
1. Navigate to Page Flow Configuration for a module. For more information, see [Accessing Page Flow Configuration on page 133](#).

*Citizen Access Setup displays the page flow configuration area.*

2. Use the drop-down list to search and select an existing page flow, or click the button to create a new one.

*Citizen Access Setup displays the steps and pages relating to the page flow.*

3. Navigate to the **Receipt Page** in the **Final Step** of the page flow.



4. Click the link associated with the receipt page you want to customize.

*Citizen Access Setup displays the associated receipt page in the center panel as its own tab.*

The screenshot shows a web-based application interface for 'Service Request Page Flow Configuration'. At the top, there are two tabs: 'Service Request Page Flow Configuration' and 'Service Request Receipt'. The 'Service Request Receipt' tab is currently active, indicated by a blue border. Below the tabs is a navigation bar with several buttons: 'Home', 'Service Request', 'Building' (which is highlighted in blue), 'Land', 'Trade Name Management', and 'more▼'. A sub-menu item 'Apply for a Building Permit' is visible under the 'Building' button. The main content area is titled 'Receipt'. It contains a green box with a checkmark icon and the text: 'Your application has been successfully submitted. Please print your service request and retain a copy for your records.' Below this, there is a message: 'Thank you for using our online services. Your Service Request Number is .'. Further down, it says: 'You will need this number to check the status of your application or to schedule/check results of inspections. Please print a copy of your service request and post it in the work area.' At the bottom of the receipt area, there are three buttons: 'Print/View Record', 'Print/View Receipt', and 'Print/View Summary'. A note below these buttons states: 'A licensed professional is now authorized to proceed with work at the designated location.' Another note below that says: 'Your service request type requires a follow-up inspection once work is completed. You may schedule the inspection now or return to schedule the inspection upon completion of the work. "View Service Request Details" to Schedule Inspections, check status or make other updates.' At the very bottom, there is a link: 'View Service Request Details » (You must post the service request in the work area)'.

5. Modify and save the content of the receipt page. For more information, see [Chapter 10: Working with Web Pages](#).

6. Click the tab relating to Page Flow Configuration in the center panel to return to the page flow configuration for the module.

*Citizen Access Setup displays the page flow configuration area.*

7. Repeat steps 3 to 6 for customizing all module receipts, as needed.

**CHAPTER 10:**

# WORKING WITH WEB PAGES

---

Citizen Access provides numerous web pages associated with tasks and features available to public users. Administrators can customize and make changes to the various web pages in text, images, and layout at any time. This section provides instructions on how to perform basic tasks on web pages, such as customizing text, embedding links in images, creating a form layout, field customization, changing the module tab display, and customizing choices.

Please test for consistent text behavior across supported browsers. A known issue exists that different browsers may potentially handle tags or other text features inconsistently. For example, text that is bold or normal font may not be consistent between supported browsers. It is recommended best practice for administrators to check the final web page display in different browsers to prevent potential inconsistencies.

## Topics

- [Customizing Texts and Images on Web Pages](#)
- [Designing Form Layouts for Web Pages](#)
- [Customizing Home Page Components](#)
- [Working with Fields](#)
- [Defining Module Tabs and Display Order](#)
- [Configuring Columns on a Page](#)
- [Assigning Reports to Buttons](#)
- [Number of Records Displaying per Page](#)
- [Applying Custom CSS Stylesheet or JavaScript File on a Page](#)
- [Developing and Deploying a Custom Page](#)
- [Configuring URLs and Deep Links to Citizen Access Pages](#)

## Customizing Texts and Images on Web Pages

You can customize the text on Citizen Access web pages and modify the following: language, page headers, page instructional text, section instructional text, field names, field helper text, check box helper text, hyperlinks in text and within images, radio button helper text, button labels, and body text.

**Note:** When you customize the text on a web page, be aware that the maximum character length of the fields for body text and section instructions is 4,000, and there is no limitation to the length of the fields for text headings and button labels.

## Topics

- [Using the HTML Editor](#)
- [Changing Text and Display with Property Values](#)
- [Adding Instructional Text to a Web Page](#)
- [Applying Stylesheets](#)
- [Displaying Citizen Access in International Languages](#)

## Using the HTML Editor

You can modify body text and images by using the HTML Editor. Some body text may contain pre-defined variables that are enclosed in the double-dollar signs, for example, \$\$DueDate\$\$. You can leave the variables in the body text or remove them using the HTML Text Editor. Utilize the toolbar to change the font, font color, or appearance of the text. You can apply a highlight, create a hyperlink, change the content, create a bulleted or numbered list, and justify text to display the way you want it. You can apply a stylesheet to the text using the source code button. For more information about how to apply a stylesheet, see [Applying Stylesheets on page 167](#).

Access the HTML editor by selecting the text or page section you want to modify. Then, double-click in the Field Properties Body Text Value HTML Editor window. For example, to place an image and embed a URL within the graphic you click any object, including pages, that has the Body Text or Instructions attribute in its Properties panel and use the HTML Editor to add the URL location of the image. Note that when embedding an image that links to another page, the image itself is not stored within ACA.

**Note:** There is a known issue that different browsers may potentially handle tags or other text features inconsistently. For example, the HTML Editor toolbar in Safari may be inconsistent with the HTML Editor toolbar accessed via Internet Explorer. It is recommended best practice for administrators to check the final Web page display in different browsers to prevent potential inconsistencies.

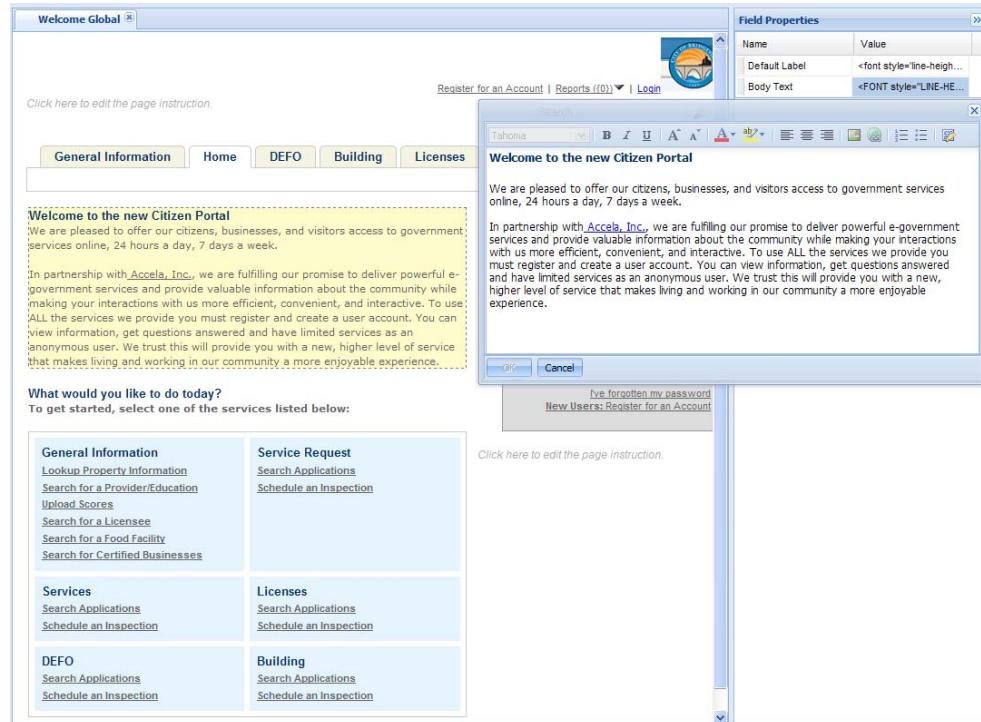
### To modify text, hyperlinks, and images using HTML Editor

1. Open a web page. Click the text or within the page section you want to modify.

*Citizen Access Setup displays a yellow box around the text or page section to indicate the area for you to modify.*

- From the Field Properties panel, double-click the Body Text Value field to open the Editor window.

*Citizen Access Setup displays the HTML Editor pop-up window.*



- Modify content of the web page in the HTML Editor. You can add text and images and embed hyperlinks in them. To add an image, follow the substeps below. To set the hyperlink for e-mail, see [Defining Activation E-mails on page 100](#).



- To add an image, set the image for activation by clicking the Image icon.

*The URL Image window opens.*

- Specify the location of the graphic image file. The image file must be on an accessible server.

- c. Click **OK** to add the image to the page.
- d. Click the Hyperlink button to associate a hyperlink with the image.

*The source code displays in a pop-up window.*

- e. Modify the HTML for the image or the link. For example, you can add a target="“\_blank” parameter to the <a> tag. You can add border="0" to the <img> tag, or you can add an alt="Link Description" to the <a> tag.

4. Click **OK** to save changes or click **Cancel** to exit.

*Citizen Access Setup displays the changes in the center panel workspace.*

## Changing Text and Display with Property Values

You can customize labels and paragraph text by making modifications to Property Values in the right panel of a web page. For example, if you want to provide supportive content for a section, you can add text in the Section Instruction Value cell. If you want to modify the label of an item, change the text in the Text Heading Value cell. If you want to change the color, double-click the Font Color Value cell and choose a color from the color grid. See [Applying Stylesheets on page 167](#). If you want to configure the initial display of the sections on the Record Detail or Review Information page, select the header of section, and set the Expanded property of the section to true or false.

**Note:**

(1) The Standard Choice value `ENABLE_EXPAND_IN REVIEW_PAGE` in the Standard Choice `ACA_CONFIGS` determines whether the sections on the Record Review page (excluding the Record Type section)s expand or collapse by default.

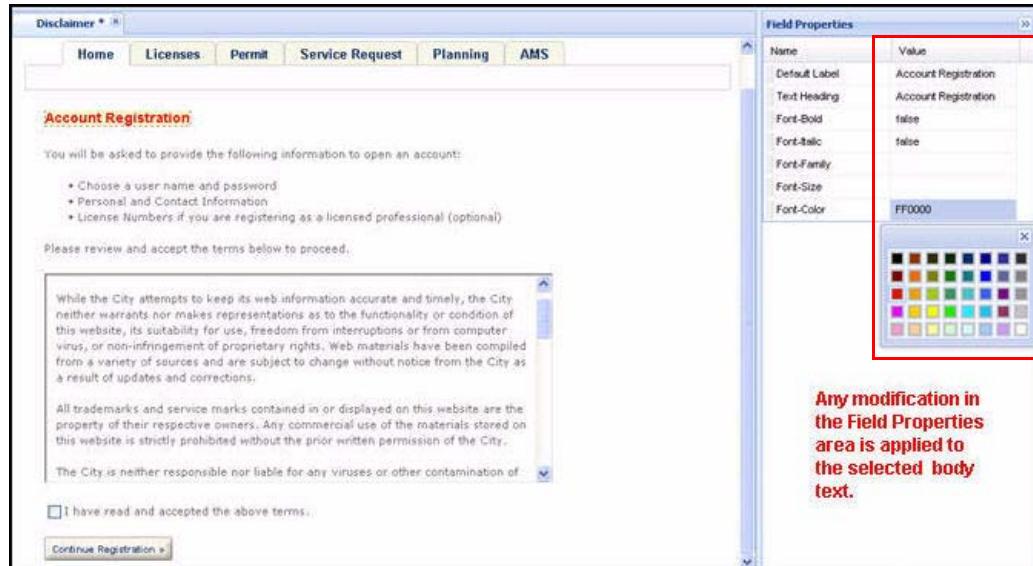
(2) The Expanded property is unavailable for the Conditions and Conditions of Approval sections on the Record Detail page.

The Property Value settings are used on labels, button text, headers, and hyperlinks. A property value cell may be a drop-down list, a text field, or an HTML Editor. If a property value cell displays the HTML Editor, enter the text or image in the provided space and click OK. For more instructions on HTML Editor, see [Using the HTML Editor on page 161](#).

**Note:**

When you change the label of a Module in the hyperlink table on the Home page, you also change the Module tab name located in the tab tool bar at top of the web page. For more information, see [Defining Module Tabs and Display Order on page 185](#).

Figure 70: Modify Text and Display Using Properties Value Cells



**Note:** Modification in the Field Properties area is applied to the selected body text.

### To customize text using property value cells

1. Navigate to a web page and click the text or the header of a section you want to modify.  
*Citizen Access Setup displays a yellow box around the text to define the modification area.*
2. From the Properties panel on the right side of the web page, click the Properties Value cell you want to change.
  - a. Add section instruction or subsection instructions by adding content in the HTML Editor associated with the Section Instruction Value cell.
    - Use the Section Instruction Value Cell in the **Section Properties** panel for a section.
    - Use the Section Instruction Value Cell in the **Field Properties** panel for a subsection.
  - b. If you want to apply a special property to the text, True applies the Value to the Text. False removes the Value from the text.
  - c. Change the color of text by double-clicking in the **Font Color Value** cell to open a color grid for selection.
  - d. Change the text by clicking the text heading or text label Value cell and typing in the revised text.
  - e. If you selected the header of a section on the Record Detail or Review Information page, the Properties panel displays the Expanded cell. Set the cell value to True if you want to expand the section by default. Set the cell value to false if you want to collapse the section by default.

**Note:** The Expanded property is unavailable for the Conditions and Conditions of Approval sections on the Record Detail page.

3. Click the **Save** button.

Citizen Access Setup displays the text in the center panel. For example, the content entered in the Section Instructions Value cell displays below the header and above the section fields.

\* indicates a required field.

**Work Location Lookup**

Enter the address information and search for the work location look up. This is required to validate the address with our address database. If the system returns more than one match, please select the correct address from the list to be able to proceed.

* Street No:	* Street Name:	(?)	Street Type:	(?)	Direction:
<input type="text"/>	<input type="text"/> Enter street name...	<input type="button"/>	<input type="text"/> --Select--	<input type="button"/>	<input type="text"/> --Select--
Unit Type:	Unit No.:				
<input type="text"/> --Select--	<input type="text"/>				
City:	State:	(?)	*Country		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="button"/> Search	<input type="button"/> CLEAN				

## Adding Instructional Text to a Web Page

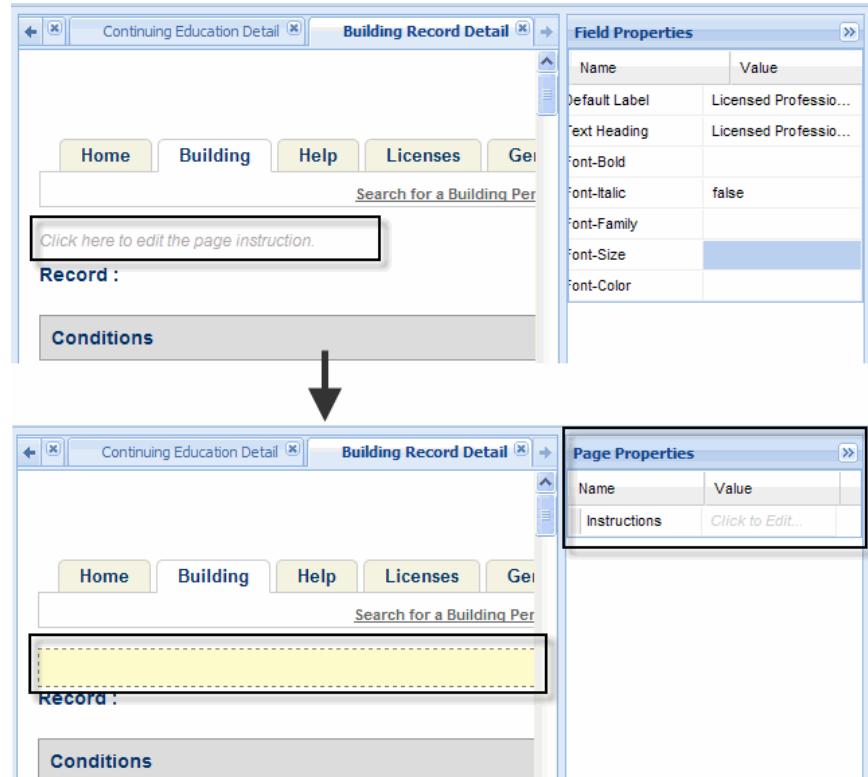
You can add customized instructional text for a web page so that public users have idea of what the web page is for and how to complete it. A web page has two instructional text areas that display the words "Click here to edit the page instruction", one right above the module tabs and the other one right below the module tabs. To add instructional text, you click either of the instructional text areas, enter content in the HTML Editor associated with the Instructions Value cell in the Page properties area.

### To add instructional text

1. Navigate to a section on a web page.

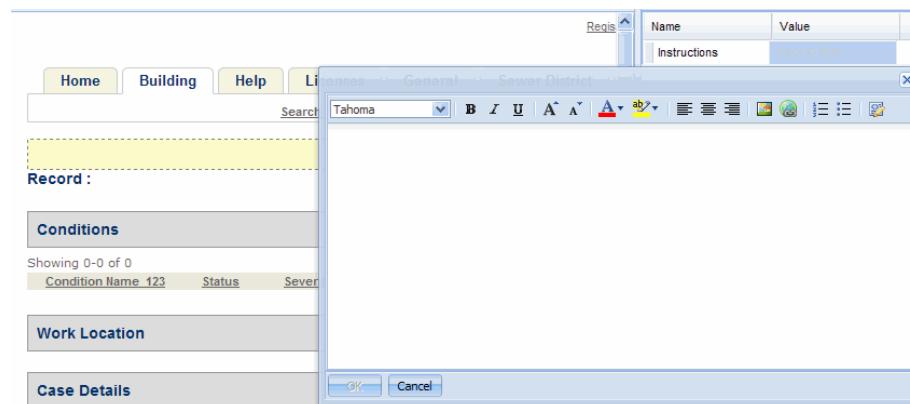
- Click the words like **Click here to edit the page instruction.**

*Citizen Access Setup displays a light yellow box around the instruction area, and the page properties area in the right panel.*



- Click the **Value** cell associated with the web page property **Instructions**.

*Citizen Access Setup displays the HTML editor.*



- Enter the instructional text and click **OK** button.

*Citizen Access Setup displays the instructional text to the institutional text area.*

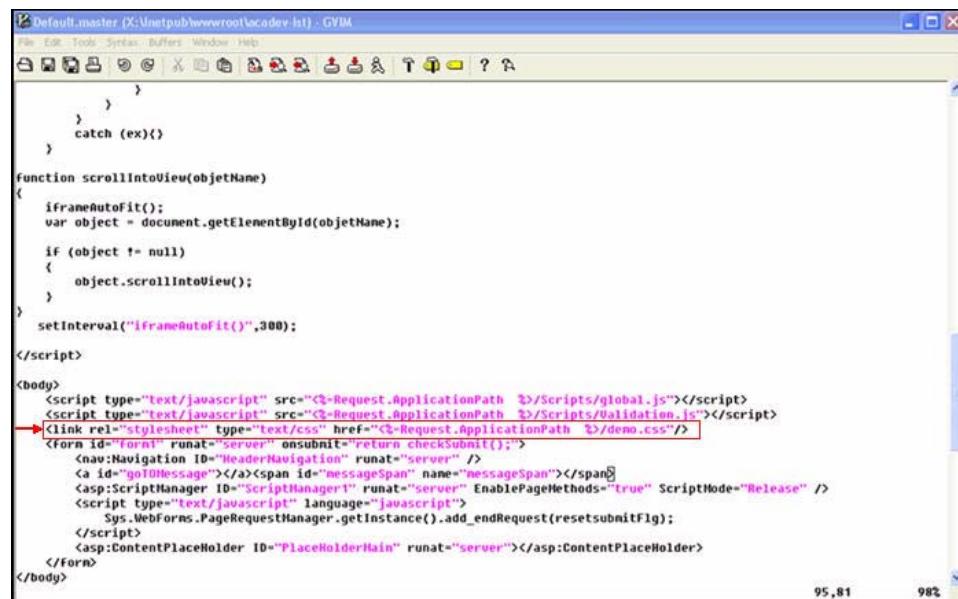
## Applying Stylesheets

Your agency may use stylesheets, which is a way an agency can define a structured document so that the set of stylistic rules for color, fonts, and layout are consistent. The pre-defined rules in your stylesheet can be applied to body text in ACA. Initial setup requires you to save the stylesheet in the ACA root folder and modify `default.master` with proper reference to the file that holds your stylesheet. Once the initial setup is complete, you can apply the class definitions to body text using the source edit button. In the example below, the file named `demo.css` is the stylesheet.

### To apply a stylesheet to body text

1. Define stylistic rules in a stylesheet and save.  
For example, `demo.css`.
2. Go to the **root** folder where ACA is installed on the IIS server.
3. Copy and paste the stylesheet to the ACA **root** folder on IIS server.
4. From the ACA **root** folder, open the file `default.master` with a text editor program.
5. Locate the `<body>` command near the bottom of the page and paste the following line to reference the location of your stylesheet.

```
<link rel="stylesheet" type = "text/css" href="  
<%=Request.ApplicationPath%>/demo.css"/>
```



6. Save and close.
7. Go to **Civic Platform Admin** and navigate to the **ACA Admin**.
8. Select a web page from the left panel.

9. Select the body text you want to apply the stylesheet, and click the field properties body cell to open HTML Editor tool.
10. Click the **Source Edit** button.



11. Specify your class definitions in the HTML code and save.

*Citizen Access Setup displays the application of the stylesheet definitions to text.*

## Displaying Citizen Access in International Languages

Citizen Access provides support for multiple international (I18N) languages. When you enable multi-language support via the Agency - Add page in Civic Platform, citizens can choose their preferred language in which to view the citizen-facing website.

An Accela Services professional must enable this feature.

### To enable multi-language support

1. Navigate to Civic Platform Classic Administration.
2. Select **Administrator Tools > Agency Profile > Agency**.

3. Locate the agency you want to modify.

Civic Platform displays the Agency—Edit page.

Agency - Add

NOTE: This screen is reserved for Accela.com Professional Services staff only.

Use this form to add a new Agency.

The screenshot shows the 'Agency - Add' form. It includes fields for Agency Code, Jurisdiction, Agency, Default Language (set to English (US)), Multi-Language Support (radio buttons for Yes or No, with Yes selected), I18N Languages (a dropdown menu with 'Select' button), I18N Languages For ACA (another dropdown menu with 'Select' button), APO Source Number (set to 1), ADDRESS1 and ADDRESS2 fields, CITY, State, ZIP fields, and Time Zone (set to Etc/GMT+12 | GMT-12:00).

4. Scroll to **Multi-language Support** and select **Yes**.
5. In the **I18N Languages for ACA** field, click **Select** and then choose the languages you want your citizen site to display in.
6. Click **Save**.

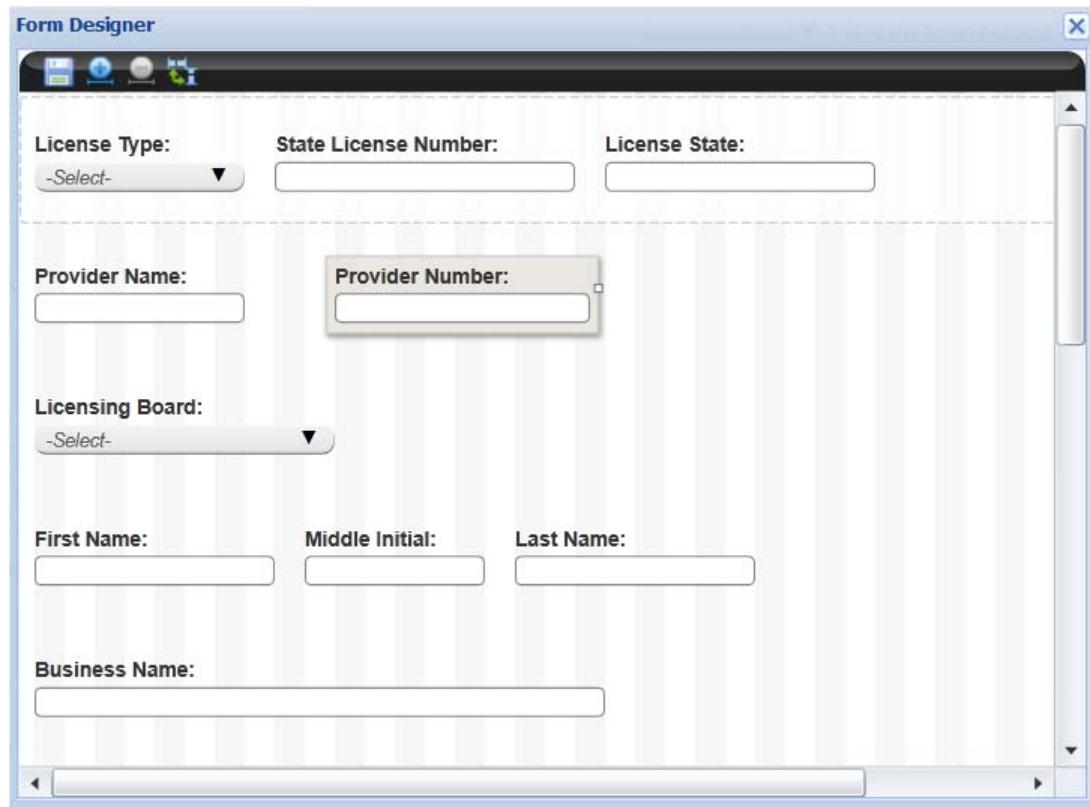
## Designing Form Layouts for Web Pages

You can define custom layouts for forms displaying to public users with Citizen Access Form Designer. The Form Designer displays numerous columns as a guide for aligning the fields and elements on a form. See [Figure 71: Form Designer](#). Administrators rearrange those displayable fields and elements in width and placement, or change the position of the labels to the top or left of the fields. Form Designer applies to the application intake form, the General Search and Search by Address sections of the Record Home page, the Contact Information section of the Enter Information page, the Look Up by Address, Look Up by Parcel Information, and Look Up by Owner sections of the APO Search page, and the Licensee Detail page.

You can also customize field labels and grouped elements to display vertically or horizontally on the form to create the desired look. For example, administrators can define a group of application-specific information radio buttons to display in a vertical column or as a horizontal row of radio buttons across the page.

The Form Designer enforces rules to maintain the integrity of spacing and standards for form layouts. For example, the form designer provides an automatic minimum space definition to prevent the overlap of fields or elements on a page. If you place a field or element too close to another element or field, the form designer automatically shifts the adjusted field or element to the nearest placement on the form based on the minimum space requirement.

This section provides the instructional text associated with the Form Designer so you can successfully launch the design tool and perform tasks for form customization.

**Figure 71: Form Designer**

### Topics

- [Launching Form Designer](#)
- [Adjusting the Placement of Fields](#)
- [Adjusting Label Position](#)
- [Adjusting the Size of Fields](#)
- [Customizing Application-Specific Information Layouts](#)

## Launching Form Designer

Citizen Access Setup provides a Section Properties area in the right panel to allow customization to sections on a web page. For example, you can define section labels and configure which fields display and require data before submission. It is within the section properties configuration area where you can locate the Rearrange Fields button to access the Form Designer. This section provides the instructional text to help you launch the Form Designer so you can customize the placement and sizing of fields on the form.

**Note:** You must have Microsoft Silverlight installed on your computer in order to successfully launch the Form Designer.

### To launch form designer

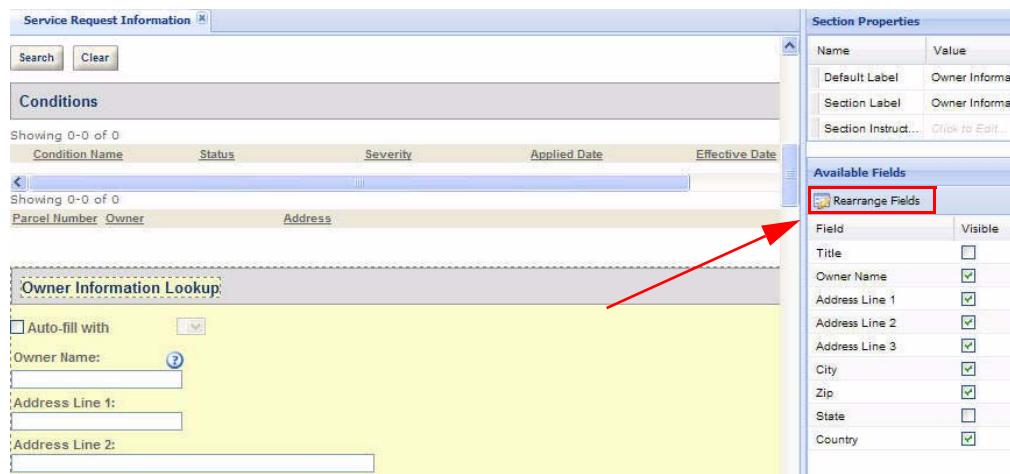
1. Navigate to the web page with the form requiring customization. For example, <Module> Information page.

*Citizen Access Setup displays the page in the center panel.*

2. Search and select the section requiring customization.

*Citizen Access Setup displays the section properties area in the right panel.*

3. Click the **Rearrange Fields** button located in the **Available Fields** section of the **Section Properties** panel.



*Citizen Access Setup launches the Form Designer in a new window using Silverlight technology.*

**Note:** You must have Silverlight installed on your system to launch Form Designer.

## Adjusting the Placement of Fields

You can adjust the placement of displayable fields and elements by dragging and dropping them into a new or existing form row. Select each field or element, one-at-a-time, and move them to the desired location.

The form designer enforces a minimum space definition to prevent the overlap of fields or elements on a page. If you place a field or element too close in proximity to another element or field, the form designer will automatically shift the adjusted field or element to the nearest placement on the form row based on the minimum space rule. This may result in an auto-shift of other fields or elements to accommodate the adjusted field. For example, if you move a text field into an existing form row and drop it in between two fields, the Form Designer will auto adjust the spacing between the fields so at least the minimal space requirement separates each one from the other. If the row cannot accommodate the field size in length, the Form Designer

will prevent you from dropping the field into the location until the size is adjusted. For instructions on how to adjust the size of a field, see [Using the HTML Editor on page 161](#).

### To adjust field placement on a form

1. Launch the Form Designer associated with the form requiring customization. For more information, see [Launching Form Designer on page 170](#).

*Citizen Access Setup displays the Form Designer with displayable fields on the grid.*

2. Click to select the field or element you want to move.

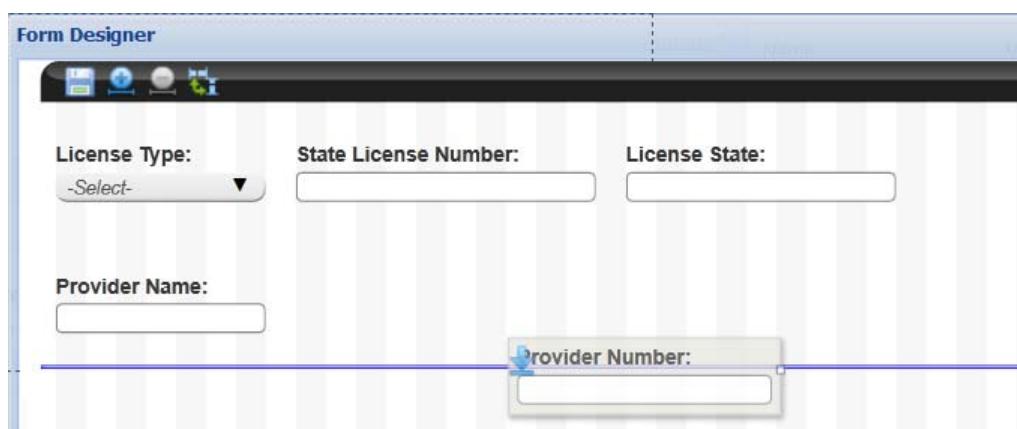
*Citizen Access activates the element and provides a visual indication of current location and placement.*

3. Move the field or element into the desired location by doing one of the following:

- Drag and drop the element into an existing row.



- Insert the field or element in a new row by dragging and dropping it into the blue line that displays between rows to create the desired effect.



4. Click the **Save** button at the top of the page to save changes.
5. Click **X** at the top of the page to close the Form Designer. See [Figure 71: Form Designer on page 170](#).

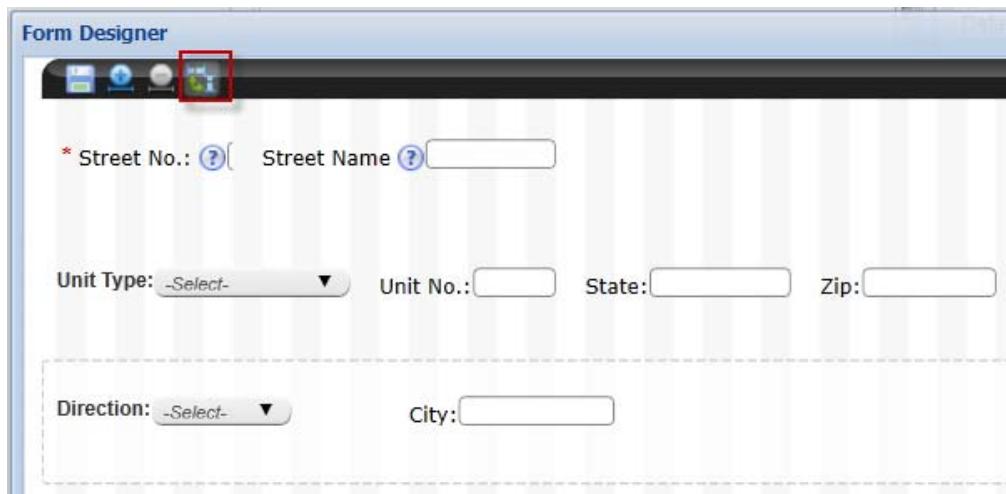
## Adjusting Label Position

You can adjust the field labels to be displayed on the top or left of the fields.

### To adjust the label position

1. Launch the Form Designer associated with the form requiring customization. For more information, see [Launching Form Designer on page 170](#).
2. Click the “Switch label position” icon in the tool bar at the top of the Form Designer.

*Citizen Access Setup displays the labels to the top of the fields (if currently on the left) or to the left of the fields (if currently on the top). Click again to switch back.*



3. Click **Save** to save changes.
4. Click **X** at the top of the page to close the Form Designer. See [Figure 71: Form Designer on page 170](#).

## Adjusting the Size of Fields

You can adjust the size for each field or field element so that it extends to the desired length in a form row. Select the field requiring size customization and use the adorner for extending or shortening the field size. The Form Designer will adjust the spacing between form fields or elements to prevent overlap.

### To adjust the size of fields

1. Launch the Form Designer associated with the form requiring customization. For more information, see [Launching Form Designer on page 170](#).

*Citizen Access Setup displays the Form Designer with displayable fields on the grid.*

2. Click to select the field or element you want to re-size.

*Citizen Access activates the element and provides an adorner as a visual indication that it is ready for configuration.*

The screenshot shows the Accela Civic Platform's Form Designer interface. At the top, there are tabs for 'Form Designer' and other options. Below the tabs, there are several input fields arranged in two rows. The first row contains 'License Type' (a dropdown menu with 'Select-'), 'State License Number' (an input field), and 'License State' (another input field). The second row contains 'Provider Name' (an input field) and 'Provider Number' (an input field with a resize handle, indicated by a small square with arrows at its bottom right corner).

3. Drag and drop the adorner to define the location of the desired width for the field or element.

This screenshot shows the same Form Designer interface as the previous one, but with a noticeable change: the 'Provider Number' field has been resized horizontally, making it wider. A black arrow points from the text 'Drag and drop the adorner to define the location of the desired width for the field or element.' to the resize handle of the 'Provider Number' field.

4. Click the **Save** button at the top of the page to retain changes.
5. Click **X** at the top of the page to close the Form Designer. See [Figure 71: Form Designer on page 170](#).

## Customizing Application-Specific Information Layouts

Citizen Access and Civic Platform provide you with the tools to create custom layouts for application-specific information. This includes the ability to add and customize instructional section text, field helper text, field watermark text, label positioning, and field label customization. Determine the vertical or horizontal arrangement of radio buttons. You can create a one-column or two-column layouts and group ASI information associated with page flow configuration. For more information, see [Configuring Application Specific Information on page 304](#). For more information about the ASI layouts, see "Designing ASI Layouts for Citizen Access" in chapter 17: Application Specific Information in the *Accela Civic Platform Administrator Guide*.

# Customizing Home Page Components

You can customize the home pages, including the Welcome Global page and the Welcome Registered page, to hide the standard components and display custom component. Standard components include the Welcome section and the link section. A custom component may contain information that your agency wants to expose to public users, such as agency logo, announcement, legal information, web URLs, and links.

To display a custom component to the home pages, you must firstly create a custom component by implementing the *ICustomizedComponent* interface, copy the component file to the ACA deployment directory, and then add the path to the home pages. See [Implementing Custom Component on page 505](#) for detailed information.

You can choose to hide some or all of the links in the link section. You can hide all the links by hiding the link section in just a few clicks in Citizen Access Setup, however you must implement the *IGrantPermission* interface to hide some individual links (actions). See [Globally Disabling Unwanted Actions on page 501](#) for detailed information on how to hide individual links.

## Topics

- [Hiding Standard Component](#)
- [Displaying Custom Component](#)

## Hiding Standard Component

You can configure to hide the Welcome section and the link section from home pages. You have the choice to either hide some of the links or hide the link section. To hide some of the links, see the *Agency-Custom Component SDK Guide* for detailed information. This section explains how to hide the Welcome section and the link section.

### To hide the Welcome section or the Link section

1. Navigate to **Citizen Access Setup > General > Home**.
2. Click to open one of the following pages:
  - Welcome Global page
  - Welcome Registered page
3. Do one of the following:
  - To hide the Welcome section, click the Welcome section to highlight it.

- To hide the link section, click the blank area in the link section to highlight it.

The screenshot shows the 'Welcome Global' page editor. On the left is the page content, which includes a title 'Welcome to Citizen Access Portal', a list of services, and a 'What would you like to do today?' section with two columns: 'General Information' and 'Building'. On the right is the 'Section Properties' panel, which lists 'Name' and 'Value' pairs. An arrow points from the explanatory text to the 'Visible' row, which has 'Visible' set to 'true'.

Name	Value
Name	Welcome Text
Visible	true

- Set the **Visible** value to "false" in the Section Properties panel.
- Click **Save** button.

## Displaying Custom Component

You can create a custom component, and display it to the Welcome Global page and the Welcome Registered page.

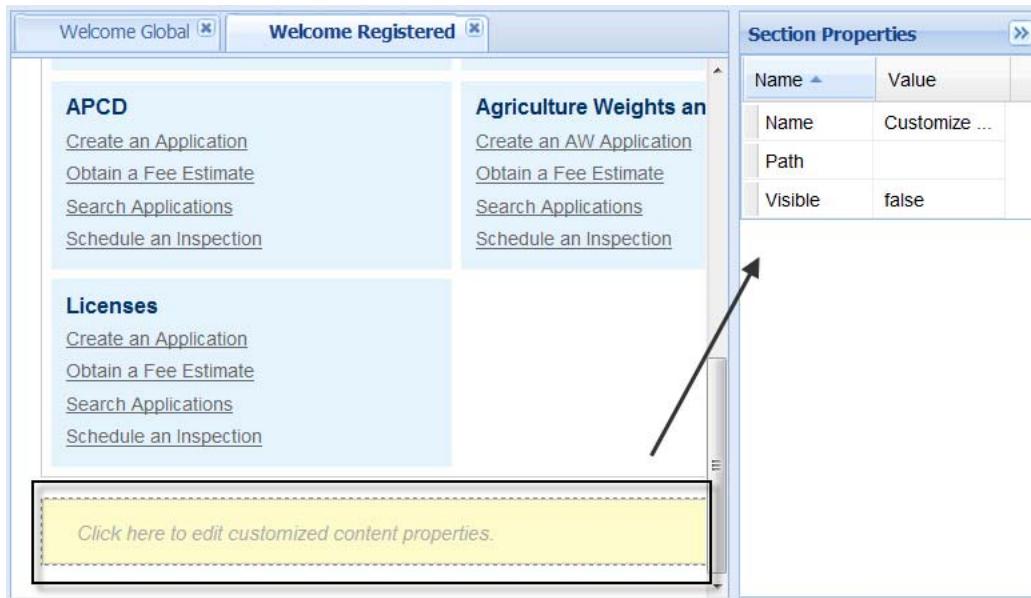
As a prerequisite, you must create a custom component and copy the file to the ACA deployment directory. See [Implementing Custom Component on page 505](#) for detailed information.

### To display Custom Component to Home pages

- Navigate to **Citizen Access Setup > General > Home**.
- Click to open one of the following pages:
  - Welcome Global page
  - Welcome Registered page

3. Scroll down to the bottom of the page.

Citizen Access Setup displays the “Click here to edit customized content properties.” area.



4. Click the “Click here to edit customized content properties.” area to highlight it.
5. Fill the **Path** value by doing one of the following:
  - If the component file is directly stored in the .../Customize/UserControls folder under the ACA deployment directory, fill the file name to the Path value. For example, AgencyCustomCompent .ascx.
  - If the file is stored in a series of folders under the .../Customize/UserControls folder, fill the sub-directory and the file name. For example. /MyFolder/MySubfolder/ AgencyCustomCompent .ascx.
6. Set the **Visible** value to “true”.
7. Click **Save** button.

## Working with Fields

Citizen Access provides you with the tools to create and customize fields so your Web pages can be designed to be intuitive for public users. This section provides you with the instructional text associated with the tasks and configuration of fields, such as setting which fields to display, configuring required fields, hiding field content, and customizing labels, helper text, and watermark text. The modifications and supportive text for fields are supported in a multiple language environment. For example, your agency can provide supportive helper text or watermarks in Arabic.

If the fields are application-specific information fields and require a custom layout, refer to [Customizing ASI Field Label Text on page 305](#).

## Topics

- [Customizing Field Labels](#)
- [Hiding Field Content](#)
- [Defining Visible and Required Fields](#)
- [Adding Helper Text](#)
- [Adding a Watermark](#)
- [Adjusting Field Size and Placement](#)
- [Displaying Action Items as Icons](#)
- [Adding or Removing Drop-Down List Choices](#)

## Customizing Field Labels

You can customize labels and paragraph text by modifying Property Values in the right panel of a design web page. For example, if you want to change the label of an item, change the text in the Text Heading Value cell. If you want to change the color, double-click the Font Color Value cell and choose a color from the color grid. See [Applying Stylesheets on page 167](#).

The Property Value method of customizing text is used throughout ACA for labels, button text, headers, and hyperlinks. Select the field label text you want to modify. Then, use the drop-down lists to choose the value you want to apply to it. True indicates applying the property value to the text and false indicates not applying the property value to the text. If you want to customize the labels for application-specific information fields, refer to [Customizing ASI Field Label Text on page 305](#).

### To customize a field label

1. Navigate to a web page and click the text you want to modify.

*Citizen Access Setup displays a yellow box around the text to define the modification area.*

2. From the Properties panel on the right side of the web page, click the Field Properties Value cell you want to change.
  - a. Apply a text field property using True or False. True applies the property to the field. False does not apply the Value to the field. For example, Font Italic Value cell True and Font-Bold value cell False would set a non-bold italic font.
  - b. Change color by double-clicking in the **Font Color Value** cell to open a color grid for selection.
  - c. Change the text by clicking the Text Label Value cell and typing in the revised text.
3. Click the **Save** button.

## Hiding Field Content

You can specify the maximum number of lines of content of a field to be displayed on page. The exceeding lines of content are hidden from page. Users can click the Show More link to show the full content. This feature only applies to the template fields on the Licensee Detail page.

### To hide field content

1. Navigate to the **Licensee Detail** page.
2. Click the Licensee Detail section header.

*Citizen Access Setup displays the Section Properties panel at the right side of the screen.*

The screenshot shows the Citizen Access Setup interface. On the left is the 'Licensee Detail' page, which includes a navigation bar with Home, Building, APCD, and Agriculture Weights and Measures options. Below the navigation is a section titled 'Licensed Professional Information:' containing a 'Licensee Detail' button. To the right of the page is the 'Section Properties' panel. This panel has two main sections: 'Available Fields' and 'Section Properties'. The 'Section Properties' section contains a table with the following data:

Name	Value
Default Label	Licensee Detail
Section Label	Licensee Detail
Section Instructions	<a href="#">Click to Edit</a>
<b>Collapse Lines</b>	0

An arrow points from the text 'Locate the Collapse Lines field in the Section Properties panel and enter a positive integer into the Value text box.' to the 'Collapse Lines' row in the table.

3. Locate the **Collapse Lines** field in the Section Properties panel and enter a positive integer into the **Value** text box.

By default it is set to blank (null), which means displaying full content on the page. Enter a positive integer to display the number of lines of the field content and hide the exceeding lines.

4. Click the **Save** button.

## Defining Visible and Required Fields

You can add or remove fields from sections on a web page. Select a section of a web page by double-clicking the gray header. The section and associated fields displays in yellow workspace. An available fields section also displays in the right panel. Mark or clear the check boxes next to the fields you want to show or hide on the web page.

**Note:** The People template fields can be displayed as the column headers to the People lists and the People search result lists, such as Licensed professional list and the Contact search result list. Administrators in Civic Platform must set the template field to Display in ACA Lists, so that the field can be displayed in the Available Fields list as the available option. For detailed information, see section "Adding an Attribute to a People Template" in the "People" chapter in the Accela Civic Platform Administrator Guide.

The check boxes are inactive if a field is required in order to submit the form. You cannot disable any of these required fields. You can set additional required fields for Citizen Access users. These required fields display in the Contact Information section of the Register Account

form, Examination form, the Education form, and the Continuing Education form, and these sections of an application or attachment:

- APO (Address, Parcel, Owner)
- Licensed Professional
- Contact
- Additional Information
- Detail Information
- Work Location

You can also define the required fields for the Enter Work Location section of the Search Service page.

**Note:** *In order for Citizen Access to function properly, certain fields must display to public users and require data before submission. These ACA dependent fields cannot be configured. Therefore, they display as read-only in the Available Fields list with check boxes marked and in gray font. See [Adding Helper Text on page 181](#).*

**Figure 72: System Required Fields**

The screenshot shows the 'Service Request Information' window. On the left is the 'Parcel Information Lookup' section, which includes fields for Parcel Number, Lot, Block, Subdivision, Book, Page, Tract, Legal Description, Parcel Area, Land Value, Improved Value, and Exemption Value. Below these are 'Search' and 'Clear' buttons. On the right are two panels: 'Section Properties' and 'Available Fields'. The 'Section Properties' panel shows settings for the 'Parcel Information L...' section. The 'Available Fields' panel lists fields with checkboxes for 'Visible' and 'Required'. The 'Parcel Number' field is highlighted with a red border, indicating it is a required field.

Field	Visible	Required
Parcel Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lot	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Block	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Subdivision	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Book	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Page	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tract	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Legal Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Parcel Area	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Land Value	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Improved Value	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Exemption Value	<input checked="" type="checkbox"/>	<input type="checkbox"/>

### To set field display and required functionality

1. Navigate to a section of a web page.
2. Click the section to activate it for configuration.

*Citizen Access Setup activates the section and displays the Section Properties panel.*

3. Go to the Available Fields list and do the following tasks:

- Mark the **Visible** check box next to the field you want to display on the form.
- Mark the **Required** check box next to the fields that require data for submission.

*Citizen Access Setup displays visible and required fields with red asterisks.*

Section Properties	
Name	Value
Default Label	Owner Information L...
Section Label	Owner Information L...
Section Instructions	<a href="#">Click to Edit...</a>

Available Fields		
<a href="#">Rearrange Fields</a>		
Field	Visible	Required
Title	<input type="checkbox"/>	<input type="checkbox"/>
Owner Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address Line 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address Line 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address Line 3	<input checked="" type="checkbox"/>	<input type="checkbox"/>
City	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Zip	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
State	<input type="checkbox"/>	<input type="checkbox"/>
Country	<input checked="" type="checkbox"/>	<input type="checkbox"/>

4. Click the **Save** button.

## Adding Helper Text

You can add customized helper text for a field so that public users have instructions on how to complete the associated field. In essence, it is a custom help topic for the field. After helper text is defined for a field, Citizen Access displays a blue question mark with the field as a visual indication to all users that helper text is available. To add helper text, enter content in the HTML Editor associated with the Instructions Value Cell in the Field Properties area.

If you want to provide instructional text to support the tasks in a section of a web page, add the content using the HTML Editor associated with the section. Refer to [Changing Text and Display with Property Values on page 163](#) for additional information.

If you want to provide instructional text to support the fields associated with application-specific information or application-specific information tables, refer to [Customizing Application-Specific Information Layouts on page 174](#).

### To add helper text

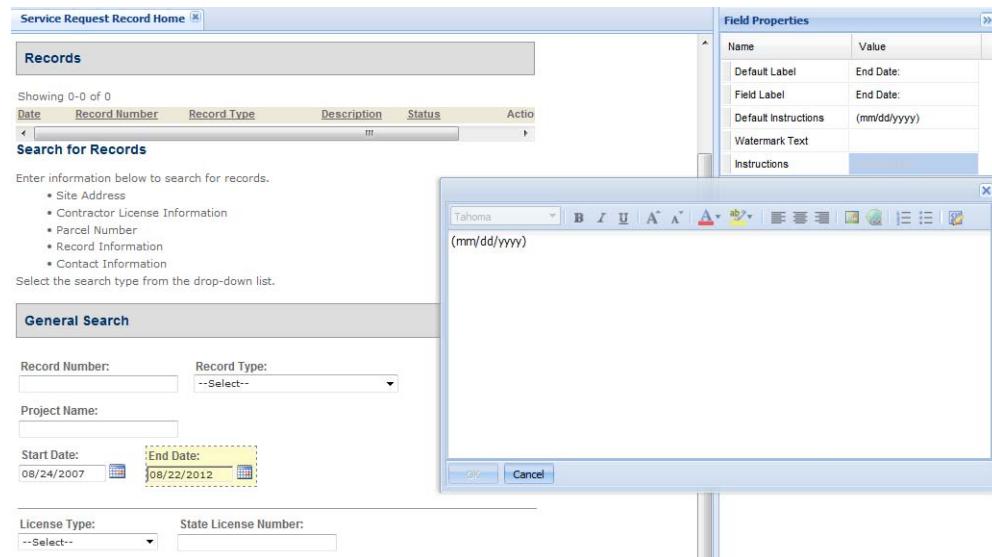
1. Navigate to a section on a web page.
2. Select the field that requires helper text customization.

*Citizen Access Setup displays the field properties area in the right panel.*

3. Click the **Value** cell associated with the field property **Instructions**.

*Citizen Access Setup displays the HTML editor.*

4. Enter the instructional helper text and click **OK**.



*Citizen Access Setup displays a blue question mark to indicate helper text is configured for the field.*

The screenshot shows the 'General Search' form with several search criteria fields. The 'End Date' field, which includes a date picker, has a blue question mark icon (a small circle with a question mark) positioned next to it, indicating that instructional helper text is configured for this field.

*When a public user clicks the blue question mark, the instructional helper text displays.*

The screenshot shows the 'General Search' form with the 'End Date' field selected. A tooltip window has appeared at the location of the blue question mark, containing the text 'Help (mm/dd/yyyy)'. This demonstrates that clicking the question mark triggers the display of instructional helper text.

## Adding a Watermark

You can add a watermark to the white space in a text field as a way to provide an example or brief instructions for completion. Watermark text displays in gray and disappears as soon as the user enters information in the field. For example, watermark text in a date field can be used to tell the user the date format for entry, such as mm/dd/yyyy. Enter watermark text in the Watermark Text Value cell in the field properties area.

**To add watermark text in a field**

1. Navigate to a section on a web page.

2. Select the field that requires a watermark.

*Citizen Access Setup displays the field properties area in the right panel.*

3. Click the **Value** cell associated with the field property **Watermark Text**.

*Citizen Access Setup activates the value cell for watermark configuration.*

4. Enter the watermark content text in the Watermark Text **Value** cell.

Field Properties	
Name	Value
Default Label	Zip:
Field Label(Default...)	Zip:
Field Label	Zip:
Watermark Text	Postal Zip Code 94583
Instructions	<a href="#">Click to Edit...</a>

*Citizen Access Setup displays fields with watermark text in gray font in the white space of the field.*

**Owner Information Lookup**

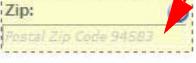
Auto-fill with

Owner Name:  [?](#)

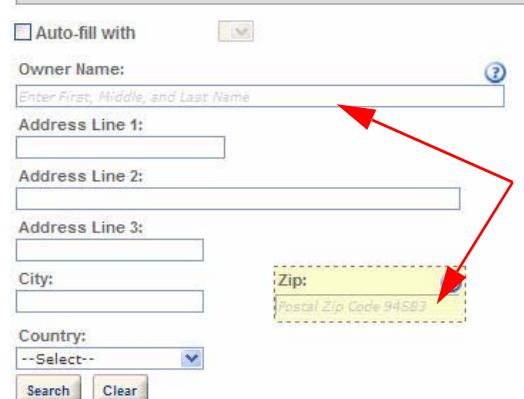
Address Line 1:

Address Line 2:

Address Line 3:

City:  Zip:  

Country:



## Adjusting Field Size and Placement

You may have the ability to alter the positioning and size of a field on a form. This is done using Citizen Access Form Designer tool. For more information about Form Designer, see [Designing Form Layouts for Web Pages](#) on page 169.

## Displaying Action Items as Icons

You can configure the Standard Choice Value, POP\_ACTION\_ITEM\_STYLE of the Standard Choice ACA\_CONFIGS to control whether users must click a dropdown button in the Action field to access the action items, or whether they can directly select an action item in the Action column. If you set the Standard Choice Value to ICO, the action items directly display in the Action column as icons, as shown in [Figure 73: Action Items in Icons](#). If you do not define the Standard Choice Value, the action items display in a dropdown list, as shown in [Figure 74: Action Items in Dropdown](#).

**Figure 73: Action Items in Icons**

Showing 1-1 of 1				
Action	Address Type	Recipient	Address	Stat
	Business Address		11112-1312 United States	Activ

**Figure 74: Action Items in Dropdown**

Showing 1-1 of 1				
Action	Address Type	Recipient	Address	Stat
	Business Address		11111-1111 United States	Activ

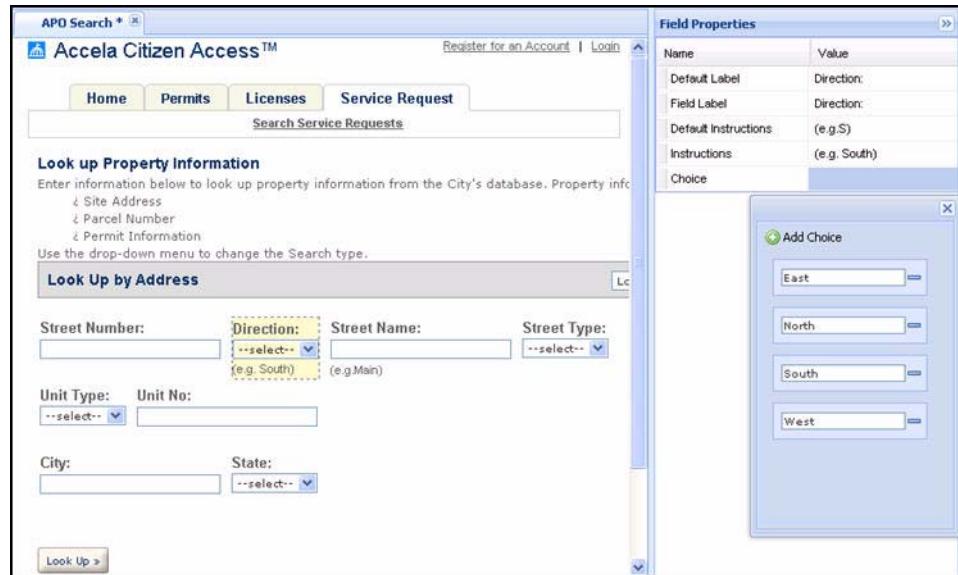
## Adding or Removing Drop-Down List Choices

You may add, modify, or remove items from drop-down lists in ACA.

### To add or remove drop-down list choices

1. Click and select a drop-down field.
2. Click the Field Property Choice Value cell to display the choices.
3. Click the green plus sign to add a choice.
4. Click the blue minus sign next to a choice to remove it.
5. Save all changes.

Please note that if you remove an option from a drop-down list, the associated Standard Choice for the drop-down list is also changed.



## Defining Module Tabs and Display Order

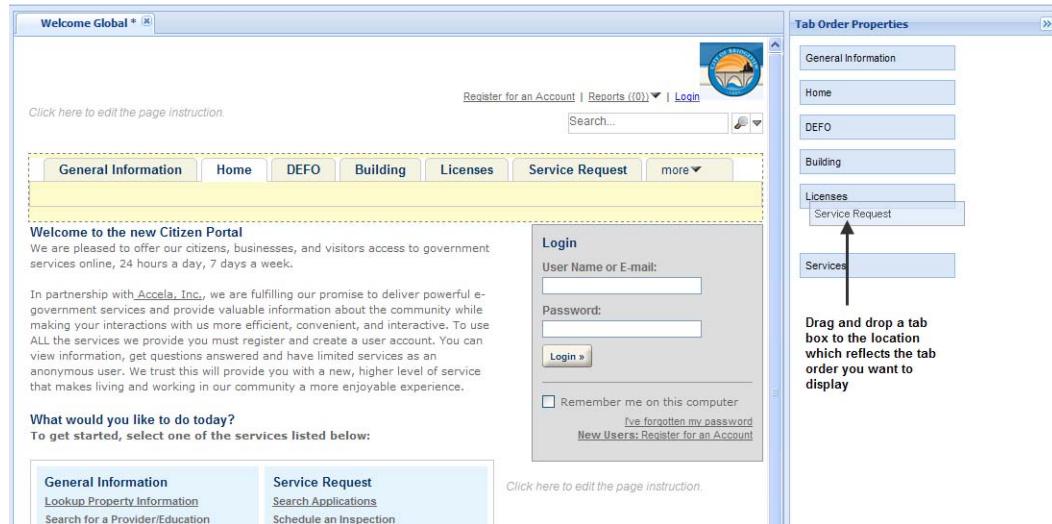
You can change the module tab text, tab display order, and view the More tab to accommodate additional modules in a drop-down list at the top of ACA web pages. If you want to add a module tab, you must enable the module in ACA on the Feature Settings page.

### Topics

- [Changing Tab Display Order](#)
- [Changing the Text on a Tab](#)
- [Extending Modular Tab Display](#)

## Changing Tab Display Order

To do this, click the tab toolbar section to highlight it. The right panel displays the Tab Order Properties section with a box representing each tab. The tab order from left to right is directly related to the box order from top to bottom. Drag and drop the boxes to the new locations to the desired tab order. See [Figure 75: Changing Tab Order](#).

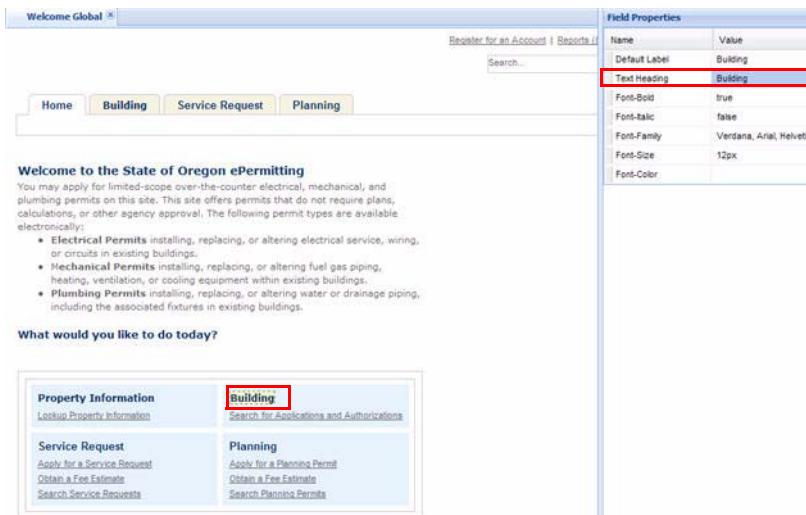
**Figure 75: Changing Tab Order**

## Changing the Text on a Tab

If you want to change the name of the text on a module tab, navigate to the Welcome page and make modifications to the table. Any change to a module header in the table reflects on the module tab.

### To change the text on a tab

1. Navigate to the **Welcome Global** or **Welcome Registered** page.
2. Go to the module table and click a module heading to make edits.



3. Click **Save**.

*The associated tab displays the new text label.*

## Extending Modular Tab Display

When an agency enables numerous modules for the site to a point where the real estate on the web page cannot accommodate all the tabs across the top of the page, Citizen Access displays one more tab on the far right side of the tab bar. See [Figure 76: Extending Modular Tab Display](#). When a public user clicks the more tab, any additional modules that do not fit across the page display in a drop-down list. You can customize the order of module tabs on the top of web page. See [Changing Tab Display Order on page 185](#). If you select a module from the module drop-down menu, the organization of the tabs shift to make room for the new module tab in view. Since, Citizen Access does not manipulate the size of the tabs, various modular tabs may be moved to the more drop-down list.

**Figure 76: Extending Modular Tab Display**



## Configuring Columns on a Page

You can customize the placement and width of columns on web pages so that you can customize the look and display order of lists in Citizen Access Setup. This section provides the instructional text associated with configuring columns.

### Topics

- [Defining Column Placement](#)
- [Setting Column Widths](#)

## Defining Column Placement

You can determine the display order for columns in a list by dragging and dropping a column header in the desired location in the list. The column order from left to right is directly related to the column header placement from top to bottom in the Section Properties area.

### To arrange columns in a list

1. Navigate to a web page with a list.

*Citizen Access Setup displays the page in the center panel.*

2. Select the section list with column headers that require re-arranging. For example, the Education list on the Record Detail page.

*Citizen Access Setup displays the Section Properties panel with the column headers in boxes.*

3. Configure which column headers you want to display in the list table.
  - Mark the check box next to the column headers you want to display.
  - Clear the check box next to the column headers you want to hide.
4. Configure the column positioning by moving the available column headers to the desired location in the section list.

The screenshot shows the Citizen Access Setup interface. On the left, there's a 'Building Record Detail' form with sections for attachments and education. On the right, the 'Section Properties' panel lists various fields with checkboxes. A red arrow points from the 'Year Joined' checkbox in the list to its header in the 'Education' section of the main form.

- Move a column header up towards the top of the available fields list to move it left in the table.
- Move a column header down towards the bottom of the available fields list to move it right in the list table.

*Citizen Access Setup immediately positions the column header in the section list table located in the center panel.*

## Setting Column Widths

You can define the column widths on web pages containing lists. This is useful so that you can adjust the column width to accommodate a long column header title or to allow more space for the information that populates the column so it displays in full view to public users.

Set the column width configuration by navigating to a web page, selecting the column header, and defining the width in the Field properties area.

### To set a column width

1. Navigate to a web page with a column header. For example, the Record Detail page in a module.
2. Go to a section and expand the view to display the list format. For example, the Attachments or Education section.
3. Click the column header you want to modify.

*Citizen Access Setup displays the Field Properties area in the right panel.*

The screenshot shows a 'Planning Record Detail' page with various status messages and sections like 'Processing Status' and 'Attachments'. On the right, a 'Field Properties' sidebar is open, displaying a table with columns 'Name' and 'Value'. A row for 'Width' has its value '100px' highlighted with a red border.

Field Properties	
Name	Value
Default Label	Record ID
Button Label	Record ID
Width	100px

4. Set the value for the column width in pixels.
5. Set other column configurations in the Field Properties area as needed. This includes modifying the label or applying a Record Type filter.
6. Click the **Save** button.

## Assigning Reports to Buttons

Reports associated with buttons exposed in ACA must be configured using Report Manager. Citizen Access provides accessibility to Report Manager for modular button configuration. For detailed instructions on how to configure Report Manager so that a report displays on an ACA button, refer to [Associating Reports with Print/View Buttons on page 475](#).

### To assign a report to a button

1. Click the button to which you want to assign a report.
- Citizen Access surrounds the button in a yellow box and the right panel displays the button field properties.*
2. Click the Report Field Property Value cell, Configure Reports, to open Report Manager.

The screenshot shows the Accela Citizen Access interface. On the left, the main content area displays a 'Building CAP Detail' page with sections for 'Permit Details', 'Fee', and 'Outstanding' fees. A red box highlights the 'Print/View Permit' button. On the right, a 'Field Properties' panel lists configuration settings for this button, including 'Default Label' (Print/View Permit &raq...), 'Button Label' (Print/View Permit »), and 'Report' (Configure Report(s)). A red arrow points from the 'Print/View Permit' button to the 'Report' link in the properties panel.

3. Assign a report to be associated with a reporting button using Report Manager configuration.

## Number of Records Displaying per Page

When users perform a search, if there is only one matching record, Citizen Access directly displays the details of the record. If there are multiple matching records, Citizen Access returns the results in pages. You can configure the number of search results displayed per page.

### To configure the number of search results displayed per page

1. Open the Record Home web page or other web pages that contain search functionality.

2. Click the list header.

*Citizen Access Setup displays a yellow box around the list header to indicate the area for you to modify.*

The screenshot shows the 'Applications or Permits Record Home' page. On the right side, there is a 'Section Properties' panel with a table titled 'Name' and 'Value'. The 'Rows Per Page' row has a value of '10' in the 'Value' column, which is highlighted with a yellow box. An arrow points from the text above to this highlighted field. The main content area shows a table header for 'Applications & Permits' with columns: Date, ID, Permit Type, Agency, Address, and Expiration Date. Below the table, there is a search section with fields for Application Information, Date Range, Contractor License Information, and Site Address. A 'General Search' button is at the bottom of the search section.

Name	Value
Rows Per Page	10
Available Fields	
<input checked="" type="checkbox"/> Date	
<input checked="" type="checkbox"/> ID	
<input checked="" type="checkbox"/> Permit Type	
<input checked="" type="checkbox"/> Agency	
<input type="checkbox"/> Module	
<input type="checkbox"/> Work Site Address	
<input type="checkbox"/> Project Name	
<input checked="" type="checkbox"/> Address	
<input type="checkbox"/> English Trade Name	
<input type="checkbox"/> Arabic Trade Name	
<input checked="" type="checkbox"/> Expiration Date	
<input type="checkbox"/> Related Records	

3. Locate the **Rows Per Page** field at the top of the Section Properties panel and enter a positive integer into the **Value** text box.
4. Click the **Save** button in the top left corner of the screen to save the change.

## Applying Custom CSS Stylesheet or JavaScript File on a Page

You can take any of the two approaches to change the look and feel of a page in Citizen Access:

- Directly create your own Cascading Style Sheet (CSS) in ACA Admin. For more information, see [Defining Your Own CSS Style on page 78](#).
- Create and apply custom CSS stylesheet files and JavaScript files to pages in Citizen Access. You can apply a custom CSS stylesheet or JavaScript file to either a single page or every page in Citizen Access.

### To apply a custom CSS stylesheet or JavaScript file to a web page

1. Add the Standard Choice Value ENABLE\_CUSTOMIZATION\_PER\_PAGE in the Standard Choice ACA\_CONFIGS to enable the feature. You must set the value description to Yes.
2. Get the aspx file name of the target web page.

- a. Right click on the target web page
- b. Select **Properties** in the popup menu and get the address (URL) of the web page.

The address (URL) of the web page contains the aspx file name. For example, if the address is `http://@ACA_SERVER@:@ACA_SERVER_PORT@/Account/welcome.aspx`, the aspx file name is welcome.aspx.

3. Change the file name of the custom CSS stylesheet or JavaScript file, so that the file name is identical as that of the aspx file of the target web page.

For example, because the aspx file name for the welcome page is welcome.aspx, the custom CSS stylesheet for the page shall be welcome.css, and the custom JavaScript file shall be welcome.js.

The aspx file name for the record home page is cap\caphome.aspx (which means that the file caphome.aspx file locates in the cap sub folder), the custom CSS stylesheet for the page shall be caphome.css, and the custom JavaScript file shall be caphome.js.

**Note:** *If the Citizen Access website is internationalized, in addition to the stylesheet or JavaScript file that can be commonly applied, you can create custom CSS stylesheet and JavaScript files that apply to a specific language. You need to add the language code as the suffix for the file name. For example, besides the welcome.css and welcome.js which can be commonly applied, you can create welcome-ar-AE.css, welcome-en-US.css, welcome-ar-AE.js, and welcome-en-US.js.*

4. Go to the folder where you installed Citizen Access, create a customization folder and then an <agency name> folder in the customization folder. For example, if the customization folder name is Customization, the <agency name> folder locates at [ACA Application]\Customization\<agency name>.
5. If the customization folder name is Customization, you can skip this step. Otherwise, open the web.config file under the Citizen Access website root folder, and add a "CustomizationDirectory" key in the <appSettings> section with the value being the actual customization folder name, for example, MyCustomization.

```
<appSettings>
    .....
    <add key="CustomizationDirectory"
        value="MyCustomization" />
    .....
</appSettings>
```

6. If the aspx file of the target web page locates in a sub folder, you shall further create a sub folder of the same name in the <agency name> folder for storing the custom page. For example, because Cap is the directory that stores the original caphome.aspx file, the folder to store the custom page shall be [ACA Application]\Customization\<agency name>\Cap.
7. Copy the custom CSS stylesheet or JavaScript file into the customization folder.

For example, if the file path of the original caphome.aspx file is:

D:\ACAPrj\aca\_trunk\_new\Web\Cap

You can copy the custom file to the following location (assuming the agency name is Test\_Agency):

D:\ACAPrj\aca\_trunk\_new\Web\Customization\Test\_Agency\Cap

8. Clear cache in ACA Admin. Remember to clear cache every time after you add or delete a custom CSS stylesheet file or JavaScript file.

## Developing and Deploying a Custom Page

You can replace any aspx page on the website with a custom page. When a user opens a page in Citizen Access, Citizen Access checks whether there exists a custom aspx file for the page. If there is, the custom page displays to the user. Otherwise, the original page displays.

### To develop and deploy a custom page

1. Decide which page you want to replace.
2. Get the aspx file of the page.

You can get the aspx file of an Citizen Access page with the following steps:

- a. Right click on the original page in Citizen Access.
- b. Select Properties in the popup menu and get the address (URL) of the page. The URL includes the aspx file name and also the directory for accessing the file.  
For example, https://\$ACA web site\$/Cap/caphome.aspx. Cap is the sub folder that stores the caphome.aspx file.
- c. Get the aspx file from the corresponding web server directory.

3. Develop a custom aspx page with the same file name. You can customize the interface of the original aspx page in the custom page.

4. Save the custom aspx file with the following steps.
  - a. Go to the folder where you installed Citizen Access, create a customization folder and then an <agency name> folder in the customization folder. For example, if the customization folder name is Customization, the <agency name> folder locates at [ACA Application]\Customization\<agency name>.
  - b. If the customization folder name is Customization, you can skip this step. Otherwise, open the web.config file under the Citizen Access website root folder, and add a "CustomizationDirectory" key in the <appSettings> section with the value being the actual customization folder name, for example, MyCustomization

```
<appSettings>
    .....
    <add key="CustomizationDirectory"
        value="MyCustomization" />
    .....
```

```
</appSettings>
```

- c. If the aspx file of the original page locates in a sub folder, you shall further create a sub folder in the <agency name> folder for storing the custom page. The new sub folder name shall be the same as the sub folder that contains the original page. For example, because Cap is the sub folder that stores the original caphome.aspx file, the sub folder to store the custom page shall be [ACA Application]\Customization\<agency name>\Cap.
- d. Save the custom aspx file in the newly-created folder.

For example, if the file path of the original caphome.aspx file is:

D:\ACAPrj\aca\_trunk\_new\Web\Cap

After you create a custom file with the same name, you must store the custom file at the following location (assuming the agency name is Test\_Agency):

D:\ACAPrj\aca\_trunk\_new\Web\Customization\Test\_Agency\Cap

## Configuring URLs and Deep Links to Citizen Access Pages

Public users navigate the Citizen Access website via hyperlinks. Normally you directly enable the hyperlink to an Citizen Access web page in ACA Admin. You can also amend the URLs of some existing pages by adding parameters to the URLs, or configure deep links for users to access other websites or other applications outside ACA.

### Topics

- [Configuring URLs for Page Access](#)
- [Configuring Deep Links that Enable External Access](#)

## Configuring URLs for Page Access

Citizen Access allows you to configuring the URLs to the record creation page or to the module home page by adding supported parameters in the URLs.

### Topics

- [Getting the System-Default URL](#)
- [Adding Parameters in the URL to a Record Creation Page](#)
- [Adding Parameters in the URL to a Module Home Page](#)
- [Adding URLs to Appropriate Page Layouts](#)

### Getting the System-Default URL

The system-default URL for accessing a page includes the ACA site domain and the aspx file name. For example, the URL that accesses the module home page looks like `https://$ACA`

```
web site$/Cap/
CapHome.aspx?module=Building&TabName=BUILDING&TabList=HOME .
```

You can get the URL of an Citizen Access page with the following steps:

1. Right click on the target web page.
2. Select **Properties** in the popup menu and get the address (URL) of the web page.

## Adding Parameters in the URL to a Record Creation Page

Use the following the syntax to include parameters in the URL for creating records in a single agency:

```
Http://$ACA web site$/Cap/CapApplyDisclaimer.aspx?CAPType=$Type1$/
$Type2$/$Type3$/$Type4$/&Module=$Module$
```

- If you want to skip the disclaimer page, use “CapEdit.aspx” to replace “CapApplyDisclaimer.aspx” in the URL.
- capType stands for the record type, and Module stands for the module name of the specified record type
- You can swap the place of the record type, CAPType=\$Type1\$/\$Type2\$/\$Type3\$/\$Type4\$, with the module name, Module=\$Module\$. This means that the following pattern is also correct.

```
Http://$ACA web site$/Cap/
CapApplyDisclaimer.aspx?Module=$Module$&CAPType=$Type1$/$Type2$/
$Type3$/$Type4$/
```

## Adding Parameters in the URL to a Module Home Page

Use the following the syntax to include parameters in the URL for accessing a module home page:

```
https://$ACA web site$/cap/
caphome.aspx?module=building&TabName=BUILDING&TabList=HOME&ShowMyPermitList=Y&SearchType=ByPermit.
```

- ShowMyPermitList. This parameter defines whether the record home page displays the My Permit List section. Its value can be either Y (default) or N.
- QuickQuery. If you enable quickquery drop-down list in the My Permit List section, this parameter defines the quickquery option to filter the record list in the section.
- SearchType. This parameter defines the search options in the record home page. For information on the parameter values and description, see [Table 7: SearchType Parameter in the URL Accessing the Module Home Page](#).

**Table 7: SearchType Parameter in the URL Accessing the Module Home Page**

SearchType Value	Description
NULL	Applies the first search option as the default search option in the module home page.
None	Hides the whole search section in the module home page.

**Table 7: SearchType Parameter in the URL Accessing the Module Home Page**

SearchType Value	Description
General	Applies the general search as the default search option in the module home page.
ByAddress	Applies the Search by Address as the default search option in the module home page.
ByLicense	Applies the Search by License as the default search option in the module home page.
ByPermit	Applies the Search by Permit as the default search option in the module home page.
ByTradeName	Applies the Search by Trade Name as the default search option in the module home page.
ByContact	Applies the Search by Contact as the default search option in the module home page.

## Adding URLs to Appropriate Page Layouts

You can add a system-default or customized URL as a link to the appropriate page layouts in an Citizen Access page or outside Citizen Access. For example, add the URL to your agency's home page. If you do not assign the specified record type to anonymous role group for record creation, when users click the link from outside ACA, the link directs them to the ACA login page. Users must log in to ACA to access the record creation page.

## Configuring Deep Links that Enable External Access

You can create hyperlinks to provide quick access to an Citizen Access page from other websites or other applications outside ACA. Those hyperlinks are deep links. Citizen Access supports deep links to the details of specific records or to specific actions (such as creating records of a specific record type).

### Topics

- [Configuring a Deep Link for a Regular Agency](#)
- [Configuring a Website for Deep Linking in a Main Agency](#)

### Configuring a Deep Link for a Regular Agency

Citizen Access provides the generic handler `urlrouting.ashx` for you to configure a deep link for a regular agency. The parameter `$urlrouting.ashx?type$` enables deep links to starting the following actions in an application: Resume an Application, Request a Trade License, Renewal and so on.

By default, deep-linked pages show the Citizen Access header, see . When deep linking to an Citizen Access page, you can remove the Citizen Access header by adding the parameter “`&HideHeader=true`” in the deep link URL.

**Figure 77: Citizen Access Header**

**Table 8: Parameters in a Deep Link** provides the list of parameters that you can use in a deep link. The following is a deep link sample to the record detail page without a Citizen Access header:

```
https://$ACAWBSITE$/
urlrouting.ashx?type=1000&Module=$Module$&capID1=$CapID1$&capID2=$CapI
D2$&capID3=$CapID3$&agencyCode=$AgencyCode$&HideHeader=true
```

**Table 8: Parameters in a Deep Link**

Variable	Description
\$ACA web site\$	The ACA website domain. For example, <code>aca-server.accela.com</code> .
\$agencyCode\$	The agency code which the users belong to.
\$capID\$/capID2\$/ \$capID3\$	The <b>capID1</b> , <b>capID2</b> , and <b>capID3</b> , each represents a part of the record alternate ID.  <b>Note:</b> <i>The capID parameters are required in the deep links with the action type being 1000, 1006, 1007, 1008, 1009, or 1010.</i>
\$urlrouting.ashx?type\$	This parameter defines the action that the deep link directs the users to. <ul style="list-style-type: none"> <li>• View Record Detail: <code>urlrouting.ashx?type=1000</code></li> <li>• Create a Record (Single record): <code>urlrouting.ashx?type=1002</code></li> <li>• Create a Record (Multiple records in a multiple-agency environment): <code>urlrouting.ashx?type=1003</code></li> <li>• Resume an Application: <code>urlrouting.ashx?type=1005</code></li> <li>• Renewal: <code>urlrouting.ashx?type=1006</code></li> <li>• Request a Trade License: <code>urlrouting.ashx?type=1007</code></li> <li>• Amendment: <code>urlrouting.ashx?type=1008</code></li> <li>• Pay Fee Due: <code>urlrouting.ashx?type=1009</code></li> <li>• Pay Fee Due in Renewal: <code>urlrouting.ashx?type=1010</code></li> <li>• Enable Citizens to Edit Records: <code>urlrouting.ashx?type=1011</code></li> </ul> <b>Note:</b> <i>The action types 1005, 1006, 1007, 1008, 1009, and 1010 do not allow anonymous user access. A deep link with one of the action type would validate users' login status before directing them to the action page.</i>
\$Module\$	The module name with which the record type is associated.
\$Type1\$/Type2\$/ \$Type3\$/Type4\$	The <b>Type1</b> , <b>Type2</b> , <b>Type3</b> , and <b>Type4</b> , each represents the standard four-level record type of group, type, subtype, and category.  If the record type has an alias, you can replace the four levels with the alias.

**Table 8: Parameters in a Deep Link (Continued)**

Variable	Description
<b>\$HideHeader\$</b>	This parameter controls whether to remove the Citizen Access header.
<b>\$culture\$</b>	This parameter specifies the language choice for the page. Depending on the language settings in the Citizen Access website, the value in \$culture\$ can be ar-AE, en-AU, en-US, es-MX, and zh-TW. For example, you can append "&culture=en-US" to the end of an existing deep link URL for accessing an Citizen Access web page in US English:  <code>https://\$ACA Web Site\$/urlrouting.ashx?type=1006&amp;agencyCode=TestA&amp;capID1=13CAP&amp;capID2=00000&amp;capID3=000F3&amp;culture=en-US</code> <p><b>Note:</b> The capID parameters are required in the deep links with the action type being 1006, 1007, 1008, 1009, or 1010.</p>
<b>\$IsSkipDisclaimer\$</b>	You can use this parameter in record creation deep links, to specify whether the record creation page flow skips the disclaimer page. If the parameter value is Y or Yes, the page flow skips the disclaimer page. If the value is N, or No, or undefined, the page flow starts with displaying the disclaimer page.  The following sample deep link URLs use the parameter \$IsSkipDisclaimer\$ to skip the disclaimer page: <ul style="list-style-type: none"> <li>Sample deep URLs for creating a single record  <code>https://\$ACA Web Site\$/urlrouting.ashx?type=1002&amp;CAPType=Test/ACA/Type/SingleRecord&amp;module=Testmodule&amp;IsSkipDisclaimer=Y</code> </li> <li>Sample deep URL for creating multiple records in a multiple-agency environment  <code>http://\$ACA Web Site\$/UrlRouting.ashx?Type=1003&amp;IsSkipDisclaimer=Y</code> </li> </ul>

## Configuring a Website for Deep Linking in a Main Agency

When the multiple-agency functionality is enabled, if you create a deep link for the main agency in a multiple-agency environment, you must design a website outside Citizen Access to pass a JSON object to Citizen Access via the POST method. This website enables public users to select one service or multiple services, before they are directed to the specified page in Citizen Access.

Here is an example JSON object. For a description of the properties in the JSON object, see [Table 9: JSON Object Properties on page 199](#).

```
{
  ServiceList:
  [
    {
      Name: 'Service1', Agency: 'Agency1' },
    {
      Name: 'Service2', Agency: 'Agency2' }
  ],
  MasterRecordType:
}
```

```
'Module/Type/SubType/Category'  
}
```

**Table 9: JSON Object Properties**

JSON Object Property	Description
<b>ServiceList</b>	The property values are the selected services. Each service comprises two elements: <ul style="list-style-type: none"><li>• <b>Name:</b> The name of the selected service.</li><li>• <b>Agency:</b> The code of the agency that provides the selected service.</li></ul>
<b>MasterRecordType</b>	The property value is the placeholder record type defined in the main agency. <b>Module</b> , <b>Type</b> , <b>SubType</b> , and <b>Category</b> in the property value represents the standard four-level record type of group, type, subtype, and category.  When services are selected, but the record type for the service does not have an associated page flow, Citizen Access applies the page flow associated with the main agency's placeholder record type to the record creation page.  When one service is selected and its record type has an associated page flow, Citizen Access ignores this property value, if any, and applies the page flow associated with the selected service' record type.

PART II

## MANAGING IMPLEMENTATION

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- Chapter 11: Implementation Planning
- Chapter 12: Defining the Registration and Account Management Process
- Chapter 13: Configuring Record Inquiry
- Chapter 14: Creating Records
- Chapter 15: Fees and Online Payments
- Chapter 16: Managing Inspections
- Chapter 17: Authorized Service
- Chapter 18: License Verification and Online Renewal
- Chapter 19: Certifications and Education
- Chapter 20: Reporting Information
- Chapter 21: Maintaining the ACA Website

## CHAPTER 11:

# IMPLEMENTATION PLANNING

---

Citizen Access provides modules, their associated features, and online tasks for agencies to implement for their public users. The purpose of this guide is to provide you with information about and configurations for those public facing options for optimal website functionality so your agency can get up and running using ACA.

It is important to make decisions about how your agency wants to implement Citizen Access so that you complete the right configurations in the right areas of product. This chapter provides a comprehensive list of the required configurations for optimal performance for the following areas of implementation: record query, registration, inspection scheduling, record creation, authorized service, viewing and/or paying fees online, and license renewal. Each area provides a list of configurations for each area of product and a cross-reference to the instructional text. The statement below is a brief explanation for each area of implementation.

If your agency requires the implementation of internationalization, please refer to the “Internationalization and Localization” appendix in the *Accela Civic Platform Internationalization Installation and Administrator Guide* for information and configuration details.

### Topics

- [Enabling HTTPS](#)
- [Configuring Public User Registration and Account Management](#)
- [Configuring for Record Inquiry](#)
- [Configuring Records for Processing](#)
- [Setting Up Fees](#)
- [Configuring Inspections](#)
- [Renewing and Verifying Licenses](#)

## Enabling HTTPS

Your agency may be using an IIS server which requires configuration for HTTPS (Hypertext Transfer Protocol over Secure Socket Layer). HTTPS is specifically for security-sensitive communication use over the web. It provides authentication and encrypted communication, which is particularly important for payment transactions or corporate logins. SSL certificates authenticate the secure communication. This section provides instructions on how to configure IIS for HTTPS and how to apply an authentic SSL Certificate for your production environment.

## Topics

- [Configuring IIS for HTTPS](#)
- [Replacing Certificates](#)

# Configuring IIS for HTTPS

This section provides the information to download the Internet Information Services (IIS) Resource Kit Tools from Microsoft Download Center, install it on your server, and run the Self SSL utility to configure IIS for HTTPS. To allow the IIS server to access your site using HTTPS, you must stop the IIS server, run the utility program to completion, and then restart the IIS server.

### To configure IIS for HTTPS

1. Download the **Internet Information Services (IIS) Resource Kit Tools**.
  - a. Open a Web Browser and go to the Microsoft Download Center.  
<http://www.microsoft.com/downloads/details.aspx?FamilyID=56fc92ee-a71a-4c73-b628-ade629c89499&DisplayLang=en>
  - b. Click the **Download** button.
2. When the download is complete, install the **IIS Resource Kit Tools** on the server where you install IIS.
3. Stop IIS server before running the SelfSSL utility program in step 4 below.
4. Run the SelfSSL utility program to configure IIS for HTTPS
  - a. Navigate to **Start > All programs > IIS Resources > SelfSSL > Self SSL**.
  - b. Run to completion.
5. Start IIS and access your site using `https://`.

# Replacing Certificates

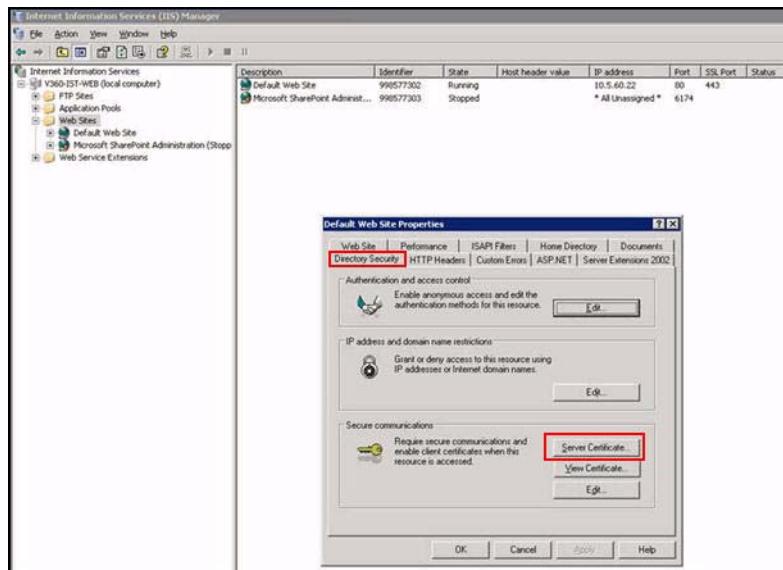
As part of the configuration process, a dummy SSL certificate can be used and configured for IIS. This type of SSL certificate works for test environments, but you must have an authentic SSL certificate from a certificate provider like Verisign, Thawte, InstantSSL, Entrust, Baltimore, or Geotrust for production environments. As soon as the real certificate is available, you can replace the dummy certificate with the real one by using the IIS Manager Admin tool.

### To replace certificates

1. Open IIS Manager.

2. From the **Web Sites** folder, right-click **Default Web Site** and choose **Properties** from the drop-down list.

*IIS Manager displays the Default Web Site Properties pop-up window.*



3. Verify you are viewing the page associated with the **Directory Security** tab.
4. In the **Secure communications** section, click the **Server Certificate** button.  
*IIS displays the Wizard for a new certificate installation.*

5. Install the new certificate by following the instructions provided by the Wizard.

## Configuring Public User Registration and Account Management

Your agency may want to require public users to register for and/or associate a license with a public user account before accessing information in Citizen Access. This feature allows the implementation of restrictions to information, provides a way to validate the communication channel with public users, assists in the management task permissions, and can control exposure to personal information. This section provides questions that help guide your thoughts in how you want to configure registration and account management for your agency. Then, it has a comprehensive list of configurations to help you implement registration and account management.

### Topics

- Deciding How to Implement Registration and Account Management
- Configuring Required Registration and Account Management Settings

## Deciding How to Implement Registration and Account Management

Before implementing the registration and account management for your public users, review the list of decision making design considerations to ensure you configure Citizen Access to meet the requirements for your agency.

- Do you want to allow public users to register in your Agency's ACA website, and whether register by an external system, or Facebook? See [Understanding the Registration Process on page 223](#).
- Do you want agency employees to activate new public user accounts? See "Activating a Public User Account" in the "Public Users" chapter in the *Accela Civic Platform Administrator Guide*.
- Do you want public users to activate their own account through e-mail verification? See [Defining Activation E-mails on page 100](#).
- Who in your agency manage public user accounts? For tasks associated with managing accounts the "Public Users" chapter in the *Accela Civic Platform Administrator Guide*.
- Do you want to allow public users to maintain their own contacts, and enable the public user to timely update their contact information in their account management page? See [Account Settings on page 59](#).
- How does your agency manage licenses relating to public user accounts? See [Defining Expired License and Insurance Settings on page 435](#).
- Does your agency want to require agency activation for linking a license? If so, see "Managing Associated Licenses" in the *Accela Civic Platform Administrator Guide*.
- Do you want to allow public users to register without a professional license and have the ability to create applications? For example, a non-licensed homeowner can apply for a permit for an accessory structure or home repair. If so, this is the default configuration.
- Do you want to allow public users to link a professional license to their account at the time of registration? Do you want to filter the available application types based on the license type? For example, you can allow all licensed plumbers to create only plumbing related applications while licensed electricians can only create electrical related applications. See [Configuring the Registration Settings Page on page 225](#).

## Configuring Required Registration and Account Management Settings

This section provides a comprehensive list of required configuration steps to get your Citizen Access website up and running with registration and account management. These steps provide all configurations of the registration and account management processes, including configuration tasks in Civic Platform and Citizen Access Setup. It is recommended best practice to implement the registration process using this checklist together with [Chapter 12: Defining the Registration and Account Management Process on page 222](#).

### To configure required registration settings

1. Configure the Standard Choice LICENSED PROFESSIONAL TYPE.

Define the LICENSED PROFESSIONAL TYPE Standard Choice and list contractor types as the Standard Choice Values. This configuration allows registered public users to associate a license with their account. Contractor types include: electrical, mechanical, gas, plumbing, and/or general.

For information on configuring the Standard Choices, refer to the *Accela Civic Platform Configuration Reference*. See also, “Managing Professionals” in the People chapter of the *Accela Civic Platform Administrator Guide*.

## 2. Configure the Standard Choices for contacts

The CONTACT TYPE Standard Choice determines the contact types that public users can select when adding contact information to their accounts, and when adding contacts to their applications.

When public users register for an account, they may only enter part of the contact information. You can configure the INDIVIDUAL\_CONTACT\_MATCH\_CRITERIA and ORGANIZATION\_CONTACT\_MATCH\_CRITERIA Standard Choices to pull the rest of contact information from a close match contact which already exists in the Civic Platform reference database.

For information on configuring the Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

## 3. Enable Registration and Login links on the Welcome Global page

Feature Settings page check box configuration that enables the Registration and Login links on the Welcome Global page. See [Table 3: Feature Settings Configuration Check Boxes on page 83](#) and [Figure 37: Feature Settings Configuration Page on page 83](#).

## 4. Define the license registration functionality

Registration Settings page configurations determine if you want to require the association of a license with a public user account, disable Add License buttons, and disable Remove License button. For configuration information, see [Register License on page 88](#).

## 5. Define the EMSE script for defining which license types have auto-issuance and associate to the *RegistrationSubmitAfter* event. See [Registration Submit After Scripting Information on page 242](#).

## 6. Define the EMSE scripts for contact validation based on SSN and FEIN. See [Setting SSN and FEIN Contact Field Validation on page 241](#).

## 7. Customize the related email notifications in Civic Platform > Administration > Setup > Communication Manager > Notification Templates.

- Password Reset
- Citizen User Registration
- Deactivate Account
- Validate Citizen User (sent to agency to activate an account)
- Account Verification (sent to public user with an activation link)
- Associate License to Account (Notice to Citizen Access User)
- Associate License to Account (Internal Notice)

Refer to the *Accela Civic Platform Administrator Guide* for complete details on customizing notification templates.

8. Enable account management functionality to allow public users to modify account details. See [Enabling Account Management Functionality on page 40](#).
9. Define password functionality to define how ACA notifies public users of a forgotten password. See [Managing Public User Passwords on page 40](#).
10. Customize the web pages related to registration. See [Customizing Registration and Account Management Web Pages on page 225](#).
11. Define expiration settings to purge inactive accounts from your database. This configuration includes a script and batch job configuration. See [Expiration Interval Settings on page 92](#).
12. Manage public user accounts

A registered public user has an account to access and view information in Citizen Access. Administrators manage the public user accounts in Civic Platform Public User portlets, by deactivating public user account, regenerating passwords, and updating information. For more information on how to maintain public user records and configuration details surrounding the Public User portlet, refer to the “Public Users” chapter in the *Accela Civic Platform Administrator Guide*.

## Configuring for Record Inquiry

You can provide the ability for public users to search for and view record information in ACA. When you enable search functionality, all record types configured in Civic Platform are available for query. This feature allows you to filter available record types and limit other types of information public users view. This feature is available for all types of users so your agency does not need to implement the registration feature for inquiry only. To successfully implement inquiry only, you must perform configurations in Citizen Access Setup.

### Topics

- [Deciding How to Implement Record Query](#)
- [Configuring Required Settings for Record Query](#)

## Deciding How to Implement Record Query

Before the application configuration process starts, decide which modules and record types you want available in ACA. Then determine what features and functionality you want displayed in record searches.

You can filter result information and customize search forms throughout the various areas of the software. You can offer a global search to allow public users to search for information throughout the entire system from any page in Citizen Access. You can implement module searches that target searching record types defined within the module. Optionally, you can extend search functionality from a module to include other defined modules. The licensed professional search functionality allows a public user to search the database for their license information. The food facility inspection search allows public users to look up the inspection

results of the licensed food facilities. You can place restrictions on license information so Citizen Access only returns the licenses relating to your account. When public users perform the Provider/Education/Licensee search, they can search for a facility that offers examinations to support the education requirements for a new license or renewal. You can also search for licensed professionals to view their credentials. Independent of the search public users choose to locate information, you can filter search results and enable public users to export them in CSV format to their computer.

**Note:** *For successful setup, use both this list of implementation decisions together with the checklist of core configurations as explained in [Configuring Required Settings for Record Query on page 207](#).*

- Do you want to offer Global Search functionality? What type of information do you want to display? See [Enabling Global Search on page 244](#).
- Do you want to filter record types with a void or hold status from searches? See [Modifying Search Pages and Filtering Data on page 264](#).
- Do you want to enable cross-module searches? See [Defining Module Search Functionality on page 246](#).
- Do you want to place restrictions on licensed professional searches? See [Defining Licensed Professional Searches on page 254](#).
- Do you want to display Inspection and Workflow comments? By default, comments display to ALL ACA USERS. See [Restricting Access to View Comments on page 311](#).
- Do you want to allow anonymous users to open documents uploaded as attachments? See [Document Attachments on page 332](#).
- Do you want to offer Provider/Education/Licensee search functionality? See [Enabling Provider/Education/Licensee Search on page 257](#).
- Do you want to enable the Food Facility Inspection search? See [Customizing Food Facility Inspection Search on page 260](#).
- Do you want to enable external APO search? See [Enabling External APO Search on page 262](#).
- Do you want to allow public users to export search result information? See [Exporting Search Results in CSV Format on page 282](#).

## Configuring Required Settings for Record Query

This section provides a comprehensive list of required configuration steps to get your Citizen Access website set up and run with record query. These steps provide all configurations relevant to record search functionality, including configuration tasks in Civic Platform and Citizen Access Setup. For example, the setup of Application Specific Information (ASI) fields, setting up global search, defining an alias for an Application Type, and displaying workflow comments. It is recommended best practice to implement the record search functionality by this checklist together with [Chapter 13: Configuring Record Inquiry on page 243](#).

**Follow the task list below to implement record search functionality on your site**

1. Enable search functionality on the Feature Settings page. See [Feature Setting Configurations on page 82](#).
  - Enable modules for ACA. See [Table 3: Feature Settings Configuration Check Boxes on page 83](#).
  - Expand module tree view to enable modular search functionality. See [Table 3: Feature Settings Configuration Check Boxes on page 83](#).
  - Enable APO search functionality. See [Table 3: Feature Settings Configuration Check Boxes on page 83](#).
  - If necessary, hide registration links if your agency does not implement Registration. See [Enabling Registration and Displaying Links on page 223](#).
2. Define record types for modules. See [Configuring Record Types in Civic Platform on page 285](#).
  - Verify the configurations specific for ACA listed below. See [Configuring Record Type Settings on page 288](#).
  - Make the record type available in ACA. See [Configuring Record Type Settings on page 288](#).
  - Define an alias name for the record type. See [Configuring Record Type Settings on page 288](#).
3. Configure global search functionality. See [Enabling Global Search on page 244](#).
4. Set module search definitions. See [Defining Module Search Functionality on page 246](#).
  - Set role-based search definitions for user types. See [Configuring Role-based Search Definitions on page 252](#).
  - Define cross module search functionality. See [Configuring Cross Module Searches on page 248](#).
  - Define address search functionality. See [Enabling Address Range Search Functionality on page 250](#).
  - Define application status settings. See [Application Status on page 114](#).
  - Apply filters to search results list. See [Filter Record Search Results on page 113](#).
  - Limit who can view contacts. See [Contact Information Controls on page 111](#).
  - Define which application information is visible on this page by following the configurations for [Record Detail Section Configuration on page 130](#).
5. Configure licensed professional searches. See [Defining Licensed Professional Searches on page 254](#).
6. Configure education and license credential search functionality. See [Inspections on page 107](#) and [Enabling Provider/Education/Licensee Search on page 257](#).
7. Configure food facility inspection search. See [Customizing Food Facility Inspection Search on page 260](#).

8. Configure external APO search. See [Enabling External APO Search on page 262](#).
9. Prepare the search forms by applying filters and customizing forms as defined in [Modifying Search Pages and Filtering Data on page 264](#).
10. Customize web pages related to search functionality. For customization steps, see [Chapter 10: Working with Web Pages on page 160](#).
  - Customize the following web pages located in the Home folder in Pages area of General Settings.
    - Welcome Global
  - Customize the following web pages located in the Module Home folder in the Pages area for a module.
    - Record Home
    - Record Detail
11. Define inspections for a module and, if necessary, only configure permissions to view inspections. See [Inspections on page 107](#).
12. Optional inspections? Recommended setting, Yes.
13. Define document attachment permissions and functionality. See [Document Attachments on page 332](#).
14. If necessary, configure condition display in ACA. See [Displaying Conditions on page 314](#).
15. Define the display of workflow and inspection comments. See [Restricting Access to View Comments on page 311](#).
16. If necessary, set up Export Search Results in CSV format feature. See [Exporting Search Results in CSV Format on page 282](#).
17. If necessary, configure report manager to display the optional summary report. See [Associating Reports with Print/View Buttons on page 475](#).
18. If you want public users to be able to view search results in a map, set [Maps on page 104](#).

## Configuring Records for Processing

Configure Citizen Access to provide public users with the ability to create a basic record online, such as a building permit or an application for a license. Civic Platform provides a default, or standard method for creating records. For alternative methodology to create records, see [Appendix C: Variations for Creating Records on page 527](#).

This section provides questions to help assess your agency's needs for record creation. This configuration process requires numerous settings and inter-dependencies in Civic Platform and Citizen Access. It is recommended best practice to use the questions, the configuration checklist, and [Chapter 14: Creating Records on page 284](#) when setting up record creation functionality.

## Topics

- Deciding How to Implement Record Processing
- Configuring Required Record Creation Settings

# Deciding How to Implement Record Processing

Before implementing the ability to create records online, review the list of decision making design considerations for implementation of record creation. This process provides a way for public users to apply for a permit, a license, or submit a service request online. Public users can track inspections, key contacts, and follow the process through the workflow.

**Note:** *For successful setup, use both this list of implementation decisions together with the checklist of core configurations as explained in [Configuring Required Record Creation Settings on page 210](#).*

- What record types do you want to make available for an online application or issuance? See [Configuring Record Types in Civic Platform on page 285](#).
- To define payment process/provider for fee collection, see [Chapter 15: Fees and Online Payments on page 358](#).  
PayPal PayflowPro, Official Payments, Official Payments Cobrand+, etc. Refer to both the “Payment Processing” chapter in the *Accela Civic Platform Administrator Guide* and the integration package *Epay SDK.zip*. Contact Accela Customer Support for assistance in obtaining the integration package.
- Do you want to allow document attachments to record types? See [Document Attachments on page 332](#).
- Whether or not to provide reports for receipts and permits? See [Configuring Report Manager for Citizen Access on page 473](#).
- How long do partially completed applications exist in the database? See [Deleting Partially Completed Applications on page 487](#).
- Does your agency require records with child records attaching to it? See [Creating a Parent-Child Record on page 527](#).
- Does your agency require amendment records (child records) or functionality for multiple agencies? See [Creating Records for Multiple Agencies on page 532](#) and [Configuring Amendment Record Functionality on page 572](#).
- Do you want to enable authorized service such as fishing and hunting license sales? See [Chapter 17: Authorized Service on page 411](#).

# Configuring Required Record Creation Settings

This section provides a comprehensive list of required configuration steps to get your Citizen Access website set up and run with record creation. These steps provide all configurations related to record functionality, including configuration tasks in Civic Platform and Citizen Access Setup. For example, document attachment configurations, Application Specific Information

(ASI) field configurations, Task Specific Information (TSI) field configurations, Application Specific (ASI) Table configuration, and Page flow configuration. It is recommended best practice to implement the record creation functionality by using this checklist together with [Chapter 14: Creating Records on page 284](#).

**Follow the task list below to implement record processing on your site**

1. Enable functionality on the Feature Settings page. See [Feature Setting Configurations on page 82](#).
  - Enable modules for ACA. See [Table 3: Feature Settings Configuration Check Boxes on page 83](#).
  - Expand module tree view to enable modular application functionality. See [Table 3: Feature Settings Configuration Check Boxes on page 83](#).
  - If necessary, enable the Obtain a Fee Estimate link for modules. See [Table 3: Feature Settings Configuration Check Boxes on page 83](#).
  - If necessary, enable APO search functionality. See [Table 3: Feature Settings Configuration Check Boxes on page 83](#).
  - If necessary, hide registration links if your agency does not implement registration. See [Enabling Registration and Displaying Links on page 223](#).
2. Define record types for modules. See [Configuring Record Types in Civic Platform on page 285](#).
  - Verify the configurations specific for ACA listed below are defined. See [Configuring Record Type Settings on page 288](#).
  - Make the record type available in ACA. See [Configuring Record Type Settings on page 288](#).
  - Define an alias name for the record type. See [Configuring Record Type Settings on page 288](#).
3. Set the default application status in Civic Platform. See [Setting the Default Status for Application Type on page 351](#).
4. Configure the ACA\_CONFIGS Standard Choice with the NO\_SAVEANDRESUMELATER Standard Choices Value. The value description options are the module names that you want to exclude from partial record functionality, such as Buildings, Licenses, Enforcement.  
For information on configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.
5. Enable Fee Functionality. See [Enabling Fees for Online Functionality on page 359](#).
  - If necessary, add the fee estimate functionality. This feature allows public users to get an estimate of the total amount due based on application information. This feature does not allow you to make a payment. For more information, see [Enabling Fee Estimation on page 369](#). Verify Function Identification (FID) Fee Estimation is enabled. The FID controls the display of the Fee Estimation check box.

- Enabling Fees for Invoices. Determine if the fee is auto-invoiced. Decide if you want to assess a fee with a script or fee indicators. For more information, see [Enabling Fees for Online Functionality on page 359](#).

- Write event scripts associated with record processing. For more information, refer to [Citizen Access Events in Appendix A: Accela Engineering Event Scripts on page 492](#).

For information on configuring the FID, refer to the *Accela Civic Platform Configuration Reference*.

**6.** Define Document Attachment Permissions and Functionality. See [Document Attachments on page 332](#).

- Define application document groups and types. see “Managing Documents for Attachments” in the “Plan Review” chapter of the *Accela Civic Platform Administrator Guide*.

**7.** Create and display ASI Fields and Tables for functionality in Citizen Access. See [Defining ASI Fields and Tables on page 304](#).

See also “Managing Application-Specific Information” in the “Application Management” chapter of the *Accela Civic Platform Administrator Guide*.

**8.** If necessary, create expressions with the Expression Builder.

Citizen Access supports expressions for fields in the ASI, ASI Table, Contact (including generic template fields and template table fields), Fee, and Licensed Professionals sections. For information on configuring expressions, see the “Expression Builder” chapter in the *Accela Civic Platform Administrator Guide*.

**9.** Configure online payment processing for the third-party payment provider. For more information, see [Online Payment Processing on page 382](#).

Refer to both the “Payment Processing” chapter in the *Accela Civic Platform Administrator Guide* and the integration package *Epay SDK.zip*. Contact Accela Customer Support for assistance in obtaining the integration package.

**10.** If necessary, set up maps functionality so public users can view records in a map viewer. See [Maps on page 104](#).

**11.** Create page flows for a module. See [Chapter 9: Page Flow Configuration on page 132](#).

You can define the EMSE license validation feature with a page flow. See [Validating During the Application Intake Process on page 432](#).

**12.** Customize web pages related to record application functionality. For customization steps, see [Chapter 10: Working with Web Pages on page 160](#).

- Customize the following web pages located in the Create an Application folder in Pages area for a module.
  - Select a License
  - Enter Work Location
  - Record type Picker
  - Building Information

- Review Information
  - Pay Fees
  - Receipt
- Customize the following web pages located in the Obtain a Fee Estimate folder in the Pages area for a module.  
Fee Estimate Summary
13. If necessary, define search functionality so public users can search and select information when creating records. See [Configuring for Record Inquiry on page 206](#).

## Setting Up Fees

You can configure the ability for agencies to collect fees associated with a record online. This feature enables public users to access their records and view its associated fees. Public users can group records together in a shopping cart, and pay for the fees in the cart from their computer. If ACA is configured to do so, public users can conveniently pay for those fees with a credit card or Echeck. This section provides indications to help you determine how you want to implement online fees and a consolidated list of configurations to implement functionality. For more information on fees, refer to [Setting Up Fees on page 213](#) and the “Fee Setup” chapter in the *Accela Civic Platform Administrator Guide*.

### Topics

- [Deciding How to Implement Online Fees](#)
- [Configuring Required Online Fee Settings](#)

## Deciding How to Implement Online Fees

Before implementing fees in Citizen Access, review the list of decision making design considerations to ensure your configurations meet the requirements for your agency.

**Note:** *For successful setup, use both this list of implementation decisions together with the checklist of core configurations as explained in [Configuring Required Online Fee Settings on page 214](#).*

- Do you want Citizen Access fees to be automatically calculated and assessed by fee indicators or scripts? Refer to the “Fee Setup” chapter in the *Accela Civic Platform Administrator Guide*. See also, [Enabling Fees for Online Functionality on page 359](#).
- Do you want the users to determine fees by data input, such as QTY? Refer to the “Fee Setup” chapter in the *Accela Civic Platform Administrator Guide*. See also [Enabling Fees for Online Functionality on page 359](#).
- Do you want a combination of auto-assess and user data entry? See [Enabling Fees for Online Functionality on page 359](#). See also “Fee Setup” chapter in the *Accela Civic Platform Administrator Guide*.
- Define payment process/provider for fee collection.

PayPal PayflowPro, Official Payments, Official Payments Cobrand+ and so on. Refer to both the “Payment Processing” chapter in the *Accela Civic Platform Administrator Guide* and the integration package *Epay SDK.zip*. Contact Accela Customer Support for assistance in obtaining the integration package.

- Does your agency provide a report for receipts and permits? See [Chapter 20: Reporting Information on page 472](#).
- Does your agency want to offer shopping cart functionality? See [Configuring Shopping Cart on page 377](#).

## Configuring Required Online Fee Settings

Online fee configurations provide public users to access their records, view the associated fees, group records together in a shopping cart, and pay for the fees in the cart from their computer. The implementation of online payment processing allows public users to use a credit card or a debit card to pay for the associated fees online. This section provides implementation questions and required configuration steps for online fee setup. The configuration of online payment processing requires additional documentation for configuration. Refer to the integration package *Epay SDK.zip*. Contact Accela Customer Support for assistance in obtaining the integration package.

It is recommended best practice to implement the record creation functionality by using this checklist together with [Chapter 15: Fees and Online Payments on page 358](#) and the integration package *Epay SDK.zip*. Also see the “Payment Processing” chapter in the *Accela Civic Platform Administrator Guide*.

### Follow the task list below to implement online fee functionality on your site

1. Define fee setup configurations, including Fee-Items, Fee-Schedules, and Payment Periods. See the “Fee-Setup” chapter in the *Accela Civic Platform Administrator Guide*.  
Verify ACA configurations for fee-items are set and enabled for ACA. See [Enabling Fees for Online Functionality on page 359](#).
2. If necessary, enable Fee Estimation.  
Enable Function Identification Fee Estimation. See [Enabling Fee Estimation on page 369](#).
3. Define Record Type configurations. Assign a fee code to the application type. See [Configuring Record Types in Civic Platform on page 285](#).
4. Configure the ACA\_CONFIGS Standard Choice with the NO\_SAVEANDRESUMELATER Standard Choices Value. The value description options are the module names that you want to exclude from Partial Record functionality, such as Buildings, Licenses, Enforcement.  
For information on configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.
5. Enable fees for invoices, see [Enabling Fees for Online Functionality on page 359](#).
  - Auto-Invoice
  - Assess the fee by script or by fee indicators

6. Write the event scripts.

The Standard Field “Created by ACA” set to yes can be queried in your script making.

For a list of scripts available in ACA, refer to “ACA” of the [Appendix A: Accela Engineering Event Scripts on page 492](#).

7. Define ASI Fields and ASI Tables. See [Configuring Application Specific Information on page 304](#).

Create and make fields available to ACA. You can also configure the Expression Builder for fields. For configuration details, refer to the “Expressions Builder” chapter in the *Accela Civic Platform Administrator Guide*.

For configuration details, refer to the “Managing Application Specific Information” section in the “Application Management” chapter of the *Accela Civic Platform Administrator Guide*.

8. Enable functionality on the Feature Settings page. See [Feature Setting Configurations on page 82](#).

- Expand a module tree view to enable modular application functionality. See [Table 3: Feature Settings Configuration Check Boxes on page 83](#).
- If necessary, enable the Obtain a Fee Estimate link for modules. See [Table 3: Feature Settings Configuration Check Boxes on page 83](#).

9. Customize web pages related to online fee functionality. For customization steps, see [Chapter 10: Working with Web Pages on page 160](#).

- Customize the following web pages located in the Create an Application folder in Pages area for a module.
  - Pay Fees
  - Receipt
- Customize the following web pages located in the Obtain a Fee Estimate folder in the Pages area for a module.
  - Fee Estimate Summary

10. If necessary, configure the deletion of partially completed applications to remove associated fees. For configuration details see [Deleting Partially Completed Applications on page 487](#).

11. Configure payment processing for the third-party payment provider.

Refer to the “Payment Processing” chapter in the *Accela Civic Platform Administrator Guide*, and for back-end setup, see the integration package *Epay SDK.zip*. Contact Accela Customer Support for assistance in obtaining the integration package.

## Configuring Inspections

Certain modules, like building, require inspections associated with the permit. Your agency can provide the ability for registered professionals or other registered public users, such as an owner, to view and schedule an inspection on their permit. This section provides questions to help you assess the inspection functionality for your ACA website. Follow the comprehensive list of tasks for a successful implementation.

## Topics

- Deciding How to Implement Inspections
- Configuring Core Inspection Settings

# Deciding How to Implement Inspections

Before implementing the inspection feature in Citizen Access, review the list of decision making design considerations to ensure your configurations meet the requirements for your agency.

**Note:** *For successful setup, use both this list of implementation decisions together with the checklist of core configurations as explained in [Configuring Core Inspection Settings on page 216](#).*

- Who have permission to schedule inspections?  
All ACA Users (including non-registered users), Registered Users, Record Creator, Contact, Owner and Licensed Professional
- Do you want Civic Platform / Citizen Access to auto-assign inspections? Y/N
- Do you want to auto-generate a new inspection upon canceling a scheduled inspection? If yes, define event scripts.
  - InspectionCancelBefore
  - InspectionCancelAfter
- Inspection calendar setup.  
Does your agency want to allow public users to request or schedule inspections?  
Request an inspection am/pm block  
Schedule specific time slot. (For instance, 8:30-9:00)
- Decision for the day-to-day considerations:  
If auto-assign is not enabled, who manages the inspection requests and assignments to inspectors?

# Configuring Core Inspection Settings

To configure inspection settings for ACA, it is critical that you pre-define inspections, inspection types, inspectors, and inspection calendars as explained in the “Inspection” and the “Calendar” chapters in the *Accela Civic Platform Administrator Guide*. This section has a comprehensive list of tasks that bring inspection functionality to public users online.

It is recommended best practice to implement the record creation functionality by using this checklist together with [Chapter 16: Managing Inspections on page 387](#).

**Follow the task list below to implement inspection functionality on your site**

1. Pre-configure inspections, inspection types, and items in Civic Platform.

For configuration details, refer to “Establishing Inspection Types” in the “Inspections” chapter of the *Accela Civic Platform Administrator Guide*.

2. Configure the inspection calendar. See [Configuring the Inspection Calendar on page 388](#).  
For configuration details, refer to “Managing Inspection Calendars” in the “Calendars” chapter in the *Accela Civic Platform Administrator Guide*.
3. Set inspection display configurations for modules on the Module Settings page. See [Defining Inspections for a Module on page 387](#).
4. Define who can schedule inspections on the Module Settings page. See [Configuring Schedule Inspections Permission on page 108](#).
5. Restrict inspection scheduling to ANY public users for certain inspection type when the record is of certain status. See [Application Status on page 114](#).
6. Define inspection type security. See “Adding or Editing Inspection Type Security” in the “Security Policies” chapter of the *Accela Civic Platform Administrator Guide*.
7. Define inspection scheduling options. See [Managing Inspection Scheduling on page 392](#).
8. Set inspection confirmation settings. See [Customizing Inspection Confirmation Details on page 403](#).
9. Customize web pages related to inspection functionality. For customization steps, see [Chapter 10: Working with Web Pages on page 160](#).
  - Customize the following web pages located in the Inspections folder in Pages area for a module.
    - Select Inspection Type
    - Inspection Date and Time
    - Inspection Location and Contact
    - Inspection Confirmation: Refer to [step 8](#) for additional information.
    - Inspection Cancellation
    - Inspection Detail
  - Customize the Inspection section in the Record Detail page under the module Home folder in Pages area.
10. If your agency have external inspectors such as contract inspectors or self-certified inspectors complete inspections, enable external inspectors to upload inspection results. See [Enabling External Inspectors to Upload Inspection Results on page 406](#).

## Renewing and Verifying Licenses

Your agency can offer online license and the renewal services. You can allow licensed professionals to apply for license, permit, or renewals online. You can use their licenses to define permissions to online tasks. Their license information can be validated regularly so that only those registered public users with a valid license can perform tasks. ACA also provides agencies with the ability to track the Education, Continuing Education, and Examination

requirements for professional or occupational licensing, streamlining the credentials process. Education requirements for licensed professionals can be tracked by the agency, upcoming license renewal reminders can be displayed, and Examination Providers can securely upload examination scores directly to the agency. This section provides design considerations for implementing license processing and a list of required configuration settings for implementation.

### Topics

- [Deciding How to Implement License Management](#)
- [Configuring Required License Verification & Online Renewal Settings](#)

## Deciding How to Implement License Management

Before implementing license management in Citizen Access, review the list of decision making design considerations to ensure your configurations meet the requirements for your agency.

**Note:** *For successful setup, utilize both this list of implementation decisions together with the checklist of core configurations as explained in [Configuring Required License Verification & Online Renewal Settings](#) on page 218.*

- Decision: How do you want to handle the issuance of the license? Do you want the license issued automatically when the fees are paid? Do you want someone in the agency to issue the license? See [Configuring License Renewal](#) on page 440.
- What areas of the system do you want to run license verification? See [Managing License Verification](#) on page 426.
- How do you want to manage the license expiration process? See [Defining Expired License and Insurance Settings](#) on page 435.
- Do you want to integrate license functionality with education management? See [Chapter 19: Certifications and Education](#) on page 449.

## Configuring Required License Verification & Online Renewal Settings

This section provides a list of required configurations to implement licensing, license validations, license renewals, and education. It is recommended best practice to implement the licensing functionality by using this checklist together with [Chapter 18: License Verification and Online Renewal](#) on page 425 and [Chapter 19: Certifications and Education](#) on page 449. The education component has configurations that are consolidated for full functionality in [Chapter 19: Certifications and Education](#) on page 449.

**Follow the task list below to implement license verification and online renewal functionality on your site.**

1. Enable Function Identification (FIDs) associated with license renewal and verification.
  - Enable **FID 8398 Record Renewal** to full access so ACA users can renew a Record.

- Enable **FID 0065 Admin Application Types** to display the **Enable for ACA** check boxes.
- **Enable FID 8393 Payment Processing** for online payments.

For information on configuring the FIDs, refer to the *Accela Civic Platform Configuration Reference*.

**2.** Define event scripts.

For a list of event scripts in ACA, refer to “ACA” in [Appendix A: Accela Engineering Event Scripts on page 492](#).

- ApplicationSubmitAfter
- PaymentReceiveAfter
- WorkflowTaskUpdateAfter
- Convert2RealCapAfter4Renew

**3.** Set up renewal expiration code information.

For configuration information, refer to “Establishing Renewal Information” in the “Business License” chapter of the *Accela Civic Platform Administrator Guide*.

**4.** Define record types for the parent license or application in a module. See [Configuring Record Types in Civic Platform on page 285](#).

- Verify the configurations specific for ACA listed below are defined. See [Configuring Record Type Settings on page 288](#).
- Make the record type available in ACA. See [Configuring Record Type Settings on page 288](#).
- Set the fee schedule.
- Set the workflow.
- Set the ASI group code.
- Set the page flow code.

**5.** Define record types for the renewal license or application in a module. See [Configuring Record Types in Civic Platform on page 285](#).

- Verify the configurations specific for ACA listed below are defined. See [Configuring Record Type Settings on page 288](#).
- Make the record type available in ACA. See [Configuring Record Type Settings on page 288](#).
- Enable application.
- Set the fee Schedule.
- Set the workflow.
- Set the ASI group code.
- Set the page flow code.

6. Create an application type for the renewal. See [Configuring License Renewal on page 440](#).

- Verify the configurations specific for ACA listed below are defined. See [Configuring Record Type Settings on page 288](#).
  - 1) Make the record type available in ACA. See [Configuring Record Type Settings on page 288](#).
  - 2) Enable renewal.
  - 3) Set the renewal record type defined in task [step 5](#).
  - 4) Set ASI group.
  - 5) Set expiration code.
  - 6) Set SmartChoice group.

7. Define page flows.

a. Associate the page flow with the renewal record type created in task [step 6](#).

b. Add the following components:

- Address
- Parcel
- Owner
- Licensed professional
- Applicant
- ASI (Application Specific Information)
- ASI Table (Application Specific Information Table)

For additional configuration details, refer to [Working with Components on page 148](#) and [Appendix B: Features Requiring Interface Implementations on page 501](#).

8. Write scripts associated with the validation of licenses.

For complete configuration details, refer to [Managing License Verification on page 426](#).

9. Define the content for the license, verification and license renewal e-mails. See [Defining Licensing E-mail Functionality on page 445](#).

10. Configure the following license verification and renewal emails in Civic Platform > Administration > Setup > Communication Manager > Notification Templates:

- License emails:
  - Connecting an approved license to a public user
  - Connecting a new license to a public user
  - Removing a license from a public user
  - Rejecting a license
- Verification emails:
  - Associating license to account
  - Associating a license to multiple accounts

- Renewal emails:
  - License renewal (automatically issued) e-mail
  - License renewal (pending)
  - License renewal (denied)
  - License renewal (approved)
  - License renewal new application notice

Refer to the Notification Templates section of the *Accela Civic Platform Administrator Guide* for complete details on customizing notification templates.

11. Customize license activation by EMSE. See [Registering Licensed Professional Accounts by EMSE on page 37](#).
12. If necessary, configure the education, continuing education, and examination functionality. See [Chapter 19: Certifications and Education on page 449](#).

## CHAPTER 12:

# DEFINING THE REGISTRATION AND ACCOUNT MANAGEMENT PROCESS

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Citizen Access offers a registration process to collect user account information. A Citizen Access user account is a public user account. A public user is any user that accesses your agency ACA website, including licensed professionals, contractors, citizens, agency employees, or business owners. Anonymous users are any public users who access the website without registration for an online account or do not log in to the ACA website. This chapter addresses how you can set up registration and the features associated with registration. This process requires configurations in Civic Platform and Citizen Access Admin, so it is critical that you refer to [Configuring Public User Registration and Account Management on page 203](#) and follow a checklist of the registration setup. This is because registration has many dependent configurations, pre-configurations, and configurations in ACA Admin.

The registration process requires a public user to provide a valid e-mail address, a username, a password, his/her contact information, and complete the rest of registration Web pages. As administrator, you must customize the content on web pages. You must also customize e-mails to support the registration process including the account activation and confirmation e-mails between the agency and public user.

You can configure global and modular feature configurations to control the display of information to specific types of public users. For example, you can manage who has the ability to perform tasks, control the access to record information, define permissions to view comments, run reports, or upload documents. Your agency can also require public users to associate a professional license with their public user account before accessing any information in Citizen Access.

Public users can manage their accounts in the Account Management page in your agency ACA website. You can manage public users by the Public User portlet available in the Civic Platform administrative area. This is particularly useful if you choose to include a verification process to control the authorization of an online account or validation of professional licenses before allowing access to your ACA website. For information and tasks performed in the Public User portlet, refer to “Public Users” chapter in the *Accela Civic Platform Administrator Guide*. For information about license verification, see [Managing License Verification on page 426](#).

**Note:** To set up the registration and account management process, it is recommended best practice to refer to the implementation questions and tasks in [Configuring Public User Registration and Account Management](#) on page 203 in Chapter 11: Implementation Planning on page 201. The indications help you assess the needs of the registration process for your agency. [Configuring Required Registration and Account Management Settings](#) provides a comprehensive configuration list for registration, including dependent settings outside of this registration chapter.

## Topics

- Understanding the Registration Process
- Enabling Registration and Displaying Links
- Configuring the Registration Settings Page
- Customizing Registration and Account Management Web Pages
- Configuring Contact Associations
- Configuring Registration E-mails
- Configuring the Security Question Choices
- Setting SSN and FEIN Contact Field Validation
- Registration Submit After Scripting Information

## Understanding the Registration Process

When public users access your agency's ACA website for the first time, they can click a registration link to access registration pages, completes the registration forms, and submits their online registration for Citizen Access. In response, Citizen Access sends an e-mail notifying to public users that they register accounts and/or their accounts need activation. As system administrator, you must display the registration link, customize the content of registration web pages, and then customize and configure the related registration e-mails. All registered public user accounts are available in Civic Platform so agencies can manage and perform additional tasks relating to public user accounts for Citizen Access.

To manage the flow of registration, you must first decide the process your agency wants to follow. For example, decide if you want an Citizen Access user to activate their own account or have an agency employee activate it. Then, configure the Standard Choices and customize the activation e-mail subject together with the content to reflect this decision.

## Enabling Registration and Displaying Links

Citizen Access provides configurations to enable registration and display associated hyperlinks on your Citizen Access home page. Public users click the Registration link to register for a public user account or the Login hyperlink to enter username and password information about access to your agency Citizen Access website. This section provides the configuration instructions to enable registration hyperlink functionality.

**To display registration and login links on the home page**

1. Navigate to **Civic Platform > V360 Administration**.
2. In the **Setup** portlet, click the **Citizen Access** item and choose **Citizen Access Setup** from the drop-down menu.  
*Civic Platform displays Citizen Access Setup pages.*
3. Select **Feature Settings** from the General Settings area in the navigation panel.  
*Citizen Access Setup displays the Feature Setting page.*

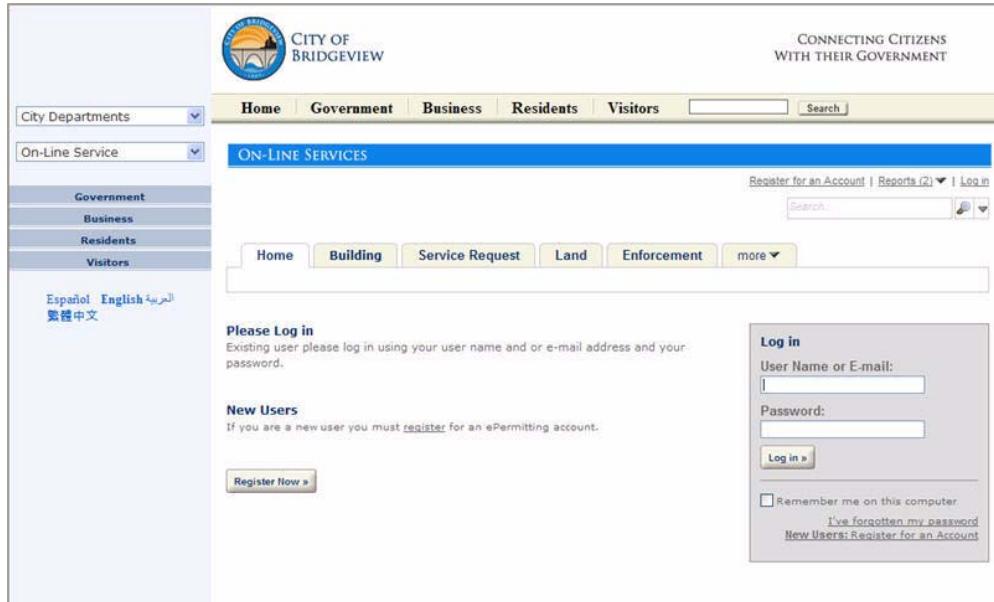


4. Mark or clear the check box next to **Registration**. Mark the Registration check box to enable the Registration feature for public users and display the Registration hyperlink on the Home page.
5. Mark or clear the check box for **Login**. Marking the Login check box exposes the Login hyperlink located at the top right corner of the Welcome Global Web page. If you clear this check box, public users only can search for records but cannot log in to ACA.
6. Optional configuration:

You may mark or clear the **Registration Required** check box for tasks associated with each module enabled in ACA. Marking the Registration Required check box for a modular task forces a user to log in or register with the agency before gaining access to the associated task functionality.

7. Click the **Save** button.

*Citizen Access Setup displays the registration hyperlink and login hyperlink to public users on the home page.*



## Configuring the Registration Settings Page

The Registration Settings page offers registration configurations and content customizations of the ACA registration e-mails between the agency and the public user. For configuration instructions on the page, including Register License, Expiration Interval Settings, Password Settings, and CAPTCHA Settings, see [Chapter 6: Registration Settings Page on page 88](#).

## Customizing Registration and Account Management Web Pages

Your agency must customize the content of web pages associated with registration and account management. The customizing of all web pages occurs in Citizen Access Setup. This section provides a list of the web pages to ensure complete setup. For instructions on how to perform tasks associated with Web pages, including the customizing of content, font, color, and size, refer to [Chapter 10: Working with Web Pages on page 160](#).

### To customize registration web pages

1. Navigate to **Citizen Access Setup** for ACA.
2. Go to **Global Settings > Pages**.
3. Select and customize the following page in the Home folder:
  - Welcome Global

- Welcome Registered
4. Select and customize the following pages in the Registration folder:
- Disclaimer
  - License Lookup
  - Enter Information
  - Registration Completion
  - Registration License
  - Confirm License
  - License Search result
  - Reset Password
  - Security Question
  - Confirm Password
  - The pages in the Contact folder, including Contact Info, Select from Professionals, Select Contact Type, and Contact Address Info. See [Configuring the Contact Pages in Registration on page 228](#).
5. Select and customize the following page in the Login Screen folder:
- Login.
  - Security Question Verification. If you enable authentication by security question, this page appears after users enter their user name and password during login.
  - Update Security Question and Answer. If you increase the number of compulsory security questions in registration, when a user who already registered logs in, this page appears for the user to update his/her security questions and answers.
  - Account Verification
  - Account Verification Expired
6. Select and customize the following page in the Account Management folder:
- Account
  - Change Password. See [Configuring the Password Settings on page 94](#).
  - Account Edit
  - The pages in the Contact folder, including New Contact, Contact Information, Select Contact Type, and Contact Address Info. See [Configuring the Contact Pages in Account Management on page 233](#).
  - (For authorized service configuration only) The pages in the Clerk Information folder, including Clerk Information, New Clerk Registered, New Clerk Registration, New Clerk Info, Edit Clerk Info, Clerk Address, and Select Contact Type. See [Customizing the Account Management Page for Authorized Agents on page 413](#).

# Configuring Contact Associations

To configure how public users add their contact information during the registration and account management, follow these steps: Preparing reference contacts in Civic Platform, switching on or off manual contact associations, and configuring the contact information pages.

## Topics

- [Understanding Contacts in Public User Accounts](#)
- [Configuring Contacts Association](#)
- [Configuring the Contact Pages in Registration](#)
- [Configuring the Contact Pages in Account Management](#)
- [Getting Associated Contact Information or User Login ID](#)

## Understanding Contacts in Public User Accounts

When a public user registers or adds a new contact to his/her account, if the new contact is a close match with an existing reference contact in the agency, public users can confirm whether to associate the reference contact with his/her account. Otherwise, Citizen Access creates a new reference contact and associates the new reference contact with the public user account. You can configure the close match criteria in the Standard Choices INDIVIDUAL\_CONTACT\_MATCH\_CRITERIA and ORGANIZATION\_CONTACT\_MATCH\_CRITERIA. For information on configuring the Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

- If the follow-up page prompts users to select “I confirm the displayed contact as my own identity”, as shown in [Figure 78: Contact Identity Confirmation](#), a reference contact in Civic Platform is a close match to the contact information entered. The displayed are the details of the reference contact. At confirmation, the public user account is associated with the reference contact.

**Figure 78: Contact Identity Confirmation**

**Contact Detail**

* Type: <input type="text" value="--Select--"/>	* First: <input type="text"/>	Middle: <input type="text"/>	* Last: <input type="text" value="KRAFT ROBERT f"/>
Name of Business: <input type="text"/>	Country: <input type="text" value="--Select--"/>		
* Address Line 1: <input type="text"/>	* City: <input type="text" value="IRVINE"/>	* State: <input type="text" value="CA"/>	E-mail: <input type="text"/>
* Zip: <input type="text"/>			

To add a new contact address, click the Add Contact Address link. To edit a contact address, click the Edit link.

**Contact Addresses**

Action	Address Type	Address	Recipient	Pho
Showing 1-9 of 9				

I confirm the displayed contact as my own identity.

**Confirm** [Back](#)

**Note:** When an authorized agent registers or adds a new clerk to his/her account, if the new clerk is a close match with an existing reference contact in the agency, the page above prompts users to select "I confirm the displayed contact as that of my clerk".

- If public users do not see a prompt to confirm the identity as shown in [Figure 78: Contact Identity Confirmation](#), instead, a confirmation message "Your account has been created successfully" displays, the contact information entered is no close match to any existing reference contact. Citizen Access creates a new reference contact based on the contact information entered, and associates it with the newly-created public user account.

## Configuring Contacts Association

Each public user account must have approved association with at least one enabled contact to remain enabled and active. Administrators can control whether public users can maintain their own contact relations, or add and edit contact addresses. The Global Settings page provides the account setting options for the functionality. For more information, see [Account Settings on page 59](#).

## Configuring the Contact Pages in Registration

Public users click the Select from Professionals or Add New button to enter contact information during registration. See [Figure 79: Sample Enter Information Window in Registration](#) for the sample Contact Information section in registration. The windows that display then guide public users through the process.

**Figure 79: Sample Enter Information Window in Registration**

Account Registration Step 2:  
Enter Account Information

\* indicates a required field.

Login Information		
* E-Mail Address: <input type="text" value="admin"/>	(?)	* Repeat E-Mail Address: <input type="text"/>
* Password: <input type="password" value="*****"/>		
* Select a Security Question: <input type="text" value="--Select--"/>		
Mobile Phone: <input type="text" value="(+ 001)"/> <input type="text"/>		
<input type="checkbox"/> Receive SMS Messages		
Contact Information		
<input type="button" value="Select from Professionals"/>	<input type="button" value="Add New"/>	<input type="button" value="Continue"/>
<input type="button" value="Discard Changes"/>		
<hr/>		
<input type="button" value="Continue Registration »"/>		

**Select from Professionals**

Select a contact to attach to this application.  
If multiple addresses exist for that contact, you may select those in next step.

Showing 1-2 of 2

Category	Type	Name
<input type="radio"/>	Associated License Contractor	HISAKO ENTERPRISES INC Contractor 865786
<input type="radio"/>	Associated License Contractor	J A A CONSTRUCTION AND SON Contractor 285684

**To customize the contact pages during registration**

1. Go to the General tab, and select the **Contact** folder under Registration.
2. Customize the field label, field size, and add a watermark or instructional text functionality of the following pages:
  - Contact Info

The Contact Info window displays after public users select a contact type for the new contact in •**Select Contact Type**.

The screenshot shows the 'Edit Contact' page with the following fields:

- \*First: [Input Field]
- Middle: [Input Field]
- \*Last: [Input Field]
- \*City: [Input Field]
- \*State: [Select Box] --Select--
- Name of Business: [Input Field]
- Country: [Select Box] United States
- \*Address Line 1: [Input Field]
- \*Zip: [Input Field]
- E-mail: [Input Field]
- Home Phone: (+ [001]) [Input Field]
- Work Phone: (+ [001]) [Input Field]
- Mobile Phone: (+ [001]) [Input Field]

Below this, there is a section titled 'Contact Addresses' with a sub-section 'Add Additional Contact Address'. It includes a note: 'To edit a contact address, click the address link.' and 'Required contact address type(s):Business'. A table shows 0 records found.

You can configure the Standard Choice Value HIDE\_CONTACT\_GENERIC\_TEMPLATE\_FOR\_CITIZEN\_REGISTRATION in ACA\_CONFIGS. This value controls whether to show or hide the contact generic template fields (including ASI fields and ASI table) that are associated with the contact type that the public user selected.

When you configure the Contact Info page, remember to select the target contact type first if you want to customize the field settings. The customized settings only apply to the selected contact type. If you define the field settings without selecting any contact type, the Contact Info window displays the default field settings.

The screenshot shows the 'Contact Information' page with the following fields:

- \*First Name: [Input Field]
- Middle: [Input Field]
- \*Last: [Input Field]
- Birth Date: [Input Field] [Calendar Icon]
- Gender:  Female  Male
- \*Individual/Organization: [Select Box] --Select--
- Address Line 1: [Input Field]
- Address Line 2: [Input Field]

**Note:** *The contact types which are not selected in the Type Option settings are unavailable to public users. If you customize the field settings on a contact type which you do not select in the Type Option settings, the field settings do not take effect.*

You may customize the contact fields as desired.

- Invisible fields for confidential contact information that you do not want to disclose to the public.
- Editable fields for the common contact information that you want public users to timely update.
- Read-only fields for the shared, critical contact information that you prevent public users from direct editing without prior application.

Be aware that during the registration process, there are two possible outcomes when public users click the Save and Close button in the Contact Info window:

- If there are close matching reference contacts for the entered contact, the Contact Information changes to read-only mode, and displays the details of the first contact that meets the close matching criteria of the highest priority. The window also displays a check box with the message "I confirm the displayed contact as my own identity". If public users mark the check box and click the Confirm button, Citizen Access saves the close-matching contact as the contact, and returns to the Enter Information window.
- If there is no close match, a new reference contact is created based on the entered contact information. Citizen Access saves the entered contact, and returns to the Enter Information window.

When public users return to the Enter Information window (see [Figure 79: Sample Enter Information Window in Registration](#)) from the Contact Info window, the Contact Information section displays a summary of the saved contact. Public users can click the Edit link on the contact and then edit the contact information in the Contact Info window.

**Note:** *If public users click the Edit link on a contact which they added from a close match, the Contact Info window displays the contact information as read-only.*

- Select from Professional

If multiple licenses have an association with the new account, the Select from Professionals window displays when public users click Select from Professionals.

The screenshot shows a 'Select from Professionals' dialog box overlaid on a 'Login Information' form. The dialog box contains instructions: 'Select a contact to attach to this application. If multiple addresses exist for that contact, you may select those in next step.' It shows 'Showing 1-2 of 2' contacts:

Category	Type	Name
<input type="radio"/>	Associated License Contractor	HISAKO ENTERPRISES INC Contractor 865786
<input type="radio"/>	Associated License Contractor	J A A CONSTRUCTION AND SON Contractor 285684

At the bottom are 'Continue' and 'Discard Changes' buttons.

- Select Contact Type

The Select Contact Type window displays when public users click Add New, or after they select a licensed professional to add as the contact.

The screenshot shows a 'Select Contact Type' dialog box overlaid on a 'Login Information' form. The dialog box has a 'Type:' field with a dropdown menu showing '--Select--'. At the bottom are 'Continue' and 'Discard Changes' buttons.

You can use the Type Options for the Type field to set applicable reference contact types for public users. If you select only one reference contact type for the Type field, the Type field in Select Contact Type directly displays the contact type as its value.

**Note:** *If public users open the Select Contact Type window in which the Type field only has one applicable contact type, the expressions configured to be fired upon contact type change do not work.*

- Contact Address Info

You must configure the Standard Choice ENABLE\_CONTACT\_ADDRESS to enable the Contact Addresses as part of the contact information. For information on configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

The Contact Address Info window displays when public users click Add Additional Contact Address, or when they edit a contact address.

The screenshot shows the 'Edit Contact' dialog box with the 'Contact Address Information' tab selected. It contains fields for Country/Region (United States), City, State, Address Type, ZIP Code, Address Line 1, and Address Line 2. Below these fields are four buttons: 'Save and Close', 'Save and Add Another', 'Clear', and 'Discard Changes'. At the bottom, there is a section titled 'Contact Addresses' with a button labeled 'Add Additional Contact Address'.

3. Configure the contact and contact address identity settings if necessary. With the identity settings, both Civic Platform and Citizen Access forbid public users from adding duplicate contacts and/or duplicate contact addresses. For more information on identity settings, refer to the "Managing Contact Identity Settings" section in the "People" chapter of the *Accela Civic Platform Administrator Guide*.
4. Enable the contact address validation feature if applicable to your agency.

If you want to validate certain contact addresses against external address source, configure the Standard Choice ENABLE\_CONTACT\_ADDRESS\_VALIDATION, CONTACT\_ADDRESS\_TYPE and EXTERNAL\_CONTACT\_ADDRESS\_SOURCE\_[SOURCE Name]. For information on configuring the Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

You can customize the pop-up page that public users view when they click the Save Address button to save a contact address that requires validation for their account.

The screenshot shows the 'Matching Address Results' dialog box, displaying a list of 4 matching addresses. The columns are Street Name, Address Line 1, Address Line 2, and Address Line. The results are:

Street Name	Address Line 1	Address Line 2	Address Line
BAY	100 Pennsylvania Avenue		
BAY	54 Remsen Street		
BAY	5079 East 163rd Street		
BAY	135-55 154th Street		

At the bottom, there are 'Select' and 'Skip' buttons.

- Go to the General tab, and customize the **Validated Contact Address** page under Validated Address.

Public users can either select a matching address, or click the “skip” link to create a new address instead.

The Validated field value of a contact address displays the validation status:

- Null or empty: Civic Platform did not validate this contact address.
- No: Civic Platform validated the contact address, but the validation failed.
- Yes: Civic Platform validated the contact address, and the validation passed.

**Note:** You can unmark the *Enable Contact Address Modification* option to make sure public users do not edit validated contact addresses.

## Configuring the Contact Pages in Account Management

The Contact Information section in account management displays the list of contacts that public users already associated with their account ([Figure 80: Sample Contact Information Section in Account Management](#)). Public users can click the Add a Contact to add more contacts, or click the View action link on a contact to view the contact details. The windows that display then guide public users through the process.

**Figure 80: Sample Contact Information Section in Account Management**

Contact Information								Add a Contact
Showing 1-7 of 7   Download results								
First Name	Middle Name	Last Name	SSN	FEIN	Contact Type	Status	Action	
Tommy			***-**-4324		Individual	Pending	Actions	
Carrie						Approved	Actions	

### To customize the contact pages during account management

1. Go to the General tab, and select the **Contact** folder under Account Management.
2. Customize the field label, field size, and add a watermark or instructional text functionality of the following pages:
  - Select Contact Type

The Select Contact Type window displays when public users click Add a Contact in account management.

When configuring the Select Contact Type window, you can use the Type Options for the Type field to set applicable reference contact types for public users. If you select only one reference contact type for the Type field, the Type field in Select Contact Type directly displays the contact type as its value.

**Note:** If public users open the Select Contact Type window in which the Type field only has one applicable contact type, the expressions configured to be fired upon contact type change do not work.

- New Contact

The New Contact window displays after public users select a contact type.

**Contact Information**  
Please provide basic information about the contact you would like to associate with your account.

* First Name:	Middle:	* Last:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Preferred Channel:	Nationality:	Country:
--Select--	--Select--	United States
Home Phone:	Work Phone:	Mobile Phone:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Eye Color:	Height (cm):	Weight (kg):
--Select--	<input type="text"/>	<input type="text"/>

**Contact Addresses**

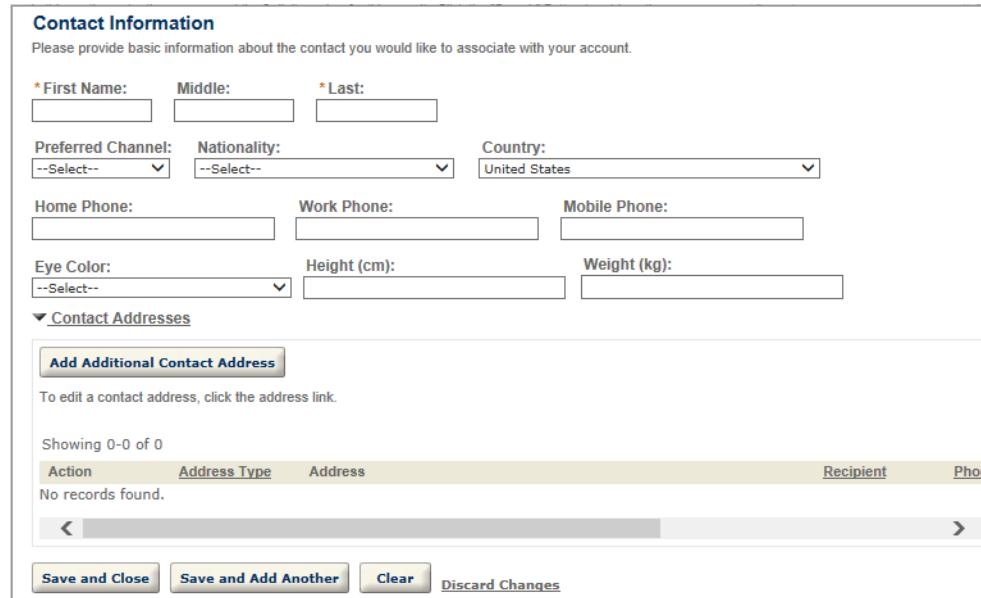
**Add Additional Contact Address**

To edit a contact address, click the address link.

Showing 0-0 of 0

Action	Address Type	Address	Recipient	Phone
No records found.				

**Save and Close** **Save and Add Another** **Clear** **Discard Changes**



When public users click the Save and Close button, Citizen Access returns to the Account Management page. When public users click the Save and Add Another button, Citizen Access stays at the New Contact window. If there are close matching reference contacts for the entered contact, Citizen Access directly replaces the entered contact with the first reference contact that meets the close matching criteria of the highest priority.

- Contact Information

When public users select the View action on a contact in account management, Citizen Access navigates to the Contact Information window.

[Manage Your Account](#)  
[View Contact Detail](#)

Validate and update your contact information at this page.

**Amendment**

*Individual/Organization:	*First Name:	Middle:	*Last:
--Select--			
Name of Business:	DBA/Trade Name:		
Home Phone:	Work Phone:	Mobile Phone:	
E-mail:	Birth Date:	Gender:	Race:
	02/19/2013	<input type="radio"/> Female <input checked="" type="radio"/> Male	--Select--

**Contact Addresses**

To edit a contact address, click the address link.

Showing 1-3 of 3

Address Type	Recipient	Address	Status	Start
Home Address		123 Main Street	Active	
Home Address		123 Main Street	Active	
Home Address		123 Main Street	Active	

[Save](#) [Back to Account Management](#)

To enable public users to apply for updates of the read-only contact information, you can associate the Amendment button with a record type filter which defines a group of record types.

1) Click the **Amendment** button.

2) Select a record type filter from the Record Type Filter Value drop-down list in the Filed Properties panel.

*The Amendment button is associated with a record type filter and becomes available to public users on the Contact Information page. They can click the Amendment button to submit an application that the record type filters to update the read-only information of the selected contact. The selected contact information auto-populates in the first contact section of the Amendment intake form.*

3) To disable contact amendment application, click the **Amendment** button, then leave the Record Type Filter drop-down list blank. The **Amendment** button is unavailable to public users on the Contact Information page.

- Contact Address Info

If you configure the Standard Choice ENABLE\_CONTACT\_ADDRESS to enable the Contact Addresses as part of the contact information, the Contact Address Info window displays from the New Contact window or Contact Information window when public users edit a contact address, or add a new contact address.

3. Customize the contact fields as desired in the New Contact page and Contact Information page:

- Remember to select the target contact type first if you want to customize the field settings. The customized settings only apply to the selected contact type. If you define the field settings without selecting any contact type, the New Contact or Contact Information window displays the default field settings.

**Note:** *The contact types which are not selected in the Type Option settings are unavailable to public users. If you customize the field settings on a contact type which you do not select in the Type Option settings, the field settings do not take effect.*

- Configure the availability of the fields.
    - Invisible fields for confidential contact information that you do not want to disclose to the public.
    - Editable fields for the common contact information that you want public users to timely update.
    - Read-only fields for the shared, critical contact information that you prevent public users from direct editing without prior application.
4. Configure the contact and contact address identity settings if necessary. With the identity settings, both Civic Platform and Citizen Access forbid public users from adding duplicate contacts and/or duplicate contact addresses. For more information on identity settings, refer to the “Managing Contact Identity Settings” section in the “People” chapter of the *Accela Civic Platform Administrator Guide*.
5. Enable the contact address validation feature if applicable to your agency.

If you want to validate certain contact addresses against external address source, configure the Standard Choice ENABLE\_CONTACT\_ADDRESS\_VALIDATION, CONTACT\_ADDRESS\_TYPE and EXTERNAL\_CONTACT\_ADDRESS\_SOURCE\_[SOURCE Name]. For information on configuring the Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

You can customize the pop-up page that public users view when they click the Save Address button to save a contact address that requires validation for their account.

**Matching Address Results** X

Showing 1-4 of 4

Street Name	Address Line 1	Address Line 2	Address Line 3
BAY	140 Fairview Avenue		
BAY	54 Bremen Street		
BAY	5079 East 163rd Street		
BAY	135-55 154th Street		

!!!

**Select** **Skip**

- Go to the General tab, and customize the **Validated Contact Address** page under Validated Address.

Public users can either select a matching address, or click the “skip” link to create a new address instead.

The Validated field value of a contact address displays the validation status:

- Null or empty: Civic Platform did not validate this contact address.
- No: Civic Platform validated the contact address, but the validation failed.
- Yes: Civic Platform validated the contact address, and the validation passed.

**Note:** You can unmark the *Enable Contact Address Modification* option to make sure public users do not edit validated contact addresses.

## Getting Associated Contact Information or User Login ID

Citizen Access gets the information about the reference contacts that a public user account relates to, and uses the information in various places:

- The auto-fill field in page flows for adding contacts lists the reference contacts and licensed professionals and owners that the user account relates to.
- The following places or fields apply the contact name if there is only one reference contact relating to the public user, or the public user login ID if there is none or more than one reference contacts that the public user relates to:
  - “Logged in as” field in the ACA website;
  - Delegate user name and inspection requestor name;
  - UserID parameter for payment API;
  - \$\$UserName\$\$ parameter in the email configuration. The email configuration no longer supports \$\$FirstName\$\$ or \$\$LastName\$\$ parameters.
- The following places or fields always apply the public user login ID:
  - Public user information passed to EMSE functions or events;
  - “Created by”, “Uploaded by”, and “Modified by” fields in applications;
  - “Uploaded by”, and “Modified by” fields when users upload scores.

There are some changes to the following fields in the public user accounts and their associated contacts:

- These fields are no longer available: Pager, Preferred Phone, User Role.
- These fields hide by default: Mobile Phone and Receive SMS Messages
- The Preferred Channel field lists the options configured in the Standard Choice CONTACT\_PREFERRED CHANNEL. By upgrading to the current version, the Standard Choice CONTACT\_PREFERRED CHANNEL incorporates the previous hard-coded Preferred Channel options. For information on configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

# Configuring Registration E-mails

All public or Licensed Professional users that register for an ACA account receive some type of e-mail notification. Use the drop-down list to select the registration e-mail you want to customize. Citizen Access Setup displays a description together with setting options for each e-mail.

Complete the **From** and **Subject** fields with the designated agency e-mail address and the subject text for the e-mail. Write and customize the body of the e-mail using the text editor.

## Topics

- Activation E-mails
- License Notification E-mails

## Activation E-mails

You should configure Citizen Access to automatically send an activation e-mail after a person registers for a public user account. If you want a user to activate their own account, configure the activation e-mail to be sent to the public user's e-mail address submitted with registration. The activation e-mail contains a hyperlink back to Civic Platform that confirms the registrant's e-mail address and activates their public user account. The registration process remains in an inactive state until the registrant selects the hyperlink contained in the activation e-mail.

If you want the agency to manage account activation, configure the registration activation e-mail to be sent to an agency employee and the employee can manually activate the account.

When a public user account activation finishes, Civic Platform sends a standard registration e-mail confirming registration activation to the registrant. The system may purge those accounts that do not get verified. Refer to [Expiration Interval Settings on page 92](#).

To configure this feature, you must customize the content in the Account Verification e-mail, define the URL for the hyperlink, and set the Purged Account Interval. Also, review the associated Standard Choices listed in [Table 10: Activation E-mail Related Standard Choices on page 239](#). For information on configuring the Standard Choices, refer to the "Standard Choices" chapter in the *Accela Civic Platform Configuration Reference*. If you do not choose to use this feature, clear the Enable Auto-Activation and Stop Sending Account Verification E-mail check box on the Registration Settings page.

### To configure the activation e-mail

1. If necessary, disable the account verification e-mail to prevent the verification e-mail exchange, by going to **General > Registration Settings**, and marking the check box **Enable Auto-Activation and Stop Sending Account Verification E-mail**.
2. In Civic Platform, navigate to **Administration > Setup > Communication Manager > Notification Templates**, and customize the **ACA\_ACTIVATION\_MESSAGE** notification template.  
Refer to the Notification Templates section of the *Accela Civic Platform Administrator Guide* for complete details on customizing notification templates.
3. Set the hyperlink for activation.

- a. Select the text you want to be the hyperlink.
- b. Click the hyperlink button.
- c. Follow the format below to set the hyperlink:

```
http://@ACA_SERVER@:@ACA_SERVER_PORT@/Account/  
PreAccountVerification.aspx?uuid=$$UUID$$
```

Replace @ACA\_SERVER@ with the agency Citizen Access URL.

If the agency uses a port, replace @ACA\_SERVER\_PORT@ with the port used for Citizen Access.

#### 4. Click the **Save** button.

Define the number of days Civic Platform saves inactive registrant account information. Refer to [Expiration Interval Settings on page 92](#). This requires you to define an EMSE script and set as a regularly scheduled batch job.

**Table 10: Activation E-mail Related Standard Choices**

Standard Choice	Standard Choices Value	Description
CONTENT_TEMPLATE_LIST	ACA_EMAIL_ACCOUNT_VERIFICATION_BY_HYPERLINK_CONTENT	E-mail content
CONTENT_TEMPLATE_LIST	ACA_EMAIL_ACCOUNT_VERIFICATION_BY_HYPERLINK_SUBJECT	E-mail subject
ACA_EMAIL_TO_AND_FROM_SETTING	ACA_EMAIL_ACCOUNT_VERIFICATION_BY_HYPERLINK_MAILFROM	E-mail from address
ACA_CONFIGS	PURGED_EXPIRED_ACCOUNT_INTERVAL	The maximum number of days Civic Platform holds onto inactive accounts before purging.

## License Notification E-mails

Public users can register for an ACA account and associate a license with it. This license number may relate to multiple public user accounts. For example, a business license could relate to various employees: the owner, the manager, and an administrative assistant. This provides flexibility in performing functions within ACA for the business. For example, if the administrative assistant has a public user account with the license associated with it, he/she can upload documents for the manager to ACA. This is assuming the agency administrator has already granted permissions for licensed professionals to upload documents.

Civic Platform provides a way to notify the original registered public user when his license is associated with another public user account as a means of security. You can configure the "Associating a License to Multiple Accounts" e-mail not only notify the registrant, but also notify either the original license registrant or all associations with the license. For example, if only the original license registrant is notified along with the registrant, the e-mail notification may only go to the business owner as the original license registrant and the administrative assistant when the administrative assistant registers and associates the license with their public user account. When the e-mail is configured to go to all associations with the license, the owner and manager

both receive e-mail notification when the administrative assistant associates the license with their account.

#### To configure the license notification e-mail

1. Navigate to **E-mail Settings**.
2. Select **Associating a License to Multiple Accounts** e-mail from the drop-down list.

*Citizen Access Setup displays the settings for the associating a license to multiple accounts e-mail.*

The screenshot shows the 'Email Settings' configuration page. At the top, it says 'Select the e-mail you want to customize: Associating a License to multiple accounts'. Below this, a note states: 'If Initial and Current Association is selected, this e-mail is sent to the first person who associates a license to their citizen account and to the current user associating this license to their account. If Initial and All Associations is selected, this e-mail is sent to the first person who associates a license to their citizen account and to all the users associating this license to their account. If no ACA user is selected, this e-mail is not sent to users when they associate a license to their ACA accounts.' A dropdown menu below the note shows 'Initial and current association' is selected. The 'From:' field contains a placeholder 'From:'. The 'Subject:' field contains a placeholder 'Subject:'. The 'Body:' section has a rich text editor toolbar with options like Tahoma, bold, italic, underline, etc. The entire interface is enclosed in a light blue border.

3. Select which users receive the e-mail notification from the drop-down list. Options include:
  - Initial and All Associations
  - Initial and Current Association
  - No ACA users: Do not send this e-mail.
4. Complete the **From** and **Subject** fields with the designated agency e-mail address that sends the e-mail and the subject text for the e-mail.
5. Write and customize the body of the e-mail using the text editor.
6. Click the **Save** button.

## Configuring the Security Question Choices

When a public user registers on the website, or when an authorized agent adds a clerk, no matter whether you enable or disable the Authentication by Security Question option (see [Enabling Authentication by Security Question on page 96](#)), the user or agent must select one or more security question to answer from the dropdown list of the Select a Security Question field.

#### To configure the security question choices

1. Navigate to one of the following pages in ACA Admin.
  - General > Pages > Registration > Enter Information.
  - General > Pages > Clerk Information > New Clerk Registration.

The change on the security question choices in one page applies to all the pages.

2. Click the **Select a Security Question** field.  
*Citizen Access Setup highlights the field.*
3. From the Field Properties panel on the right side of the web page, click the Value cell at the **Select a Security Question Option** property.  
*Citizen Access Setup displays the Options window.*
4. Modify the existing choices by doing one of the following.
  - Click the **Add Choice** button to add more choices.
  - Directly edit the value or description of an existing choice.
  - Click the delete icon next to a choice to remove an existing choice.
5. Click **OK** to save.

## Setting SSN and FEIN Contact Field Validation

Your agency can capture the SSN (Social Security Number) and FEIN (Federal Employer Identification Number) information during the registration process for a public user account or during record creation. This functionality is useful so public users can search for records based on data entry for those fields and check for duplicate contacts in Civic Platform and its add-ons. Using EMSE, Citizen Access leverages the SSN and FEIN fields to validate the current contact against existing contacts in Civic Platform and its add-ons. Based on the results from contact validation during page flow, Citizen Access will either automatically creates a new contact in Civic Platform or associates the public user account and/or record with the existing contact in the database.

The Enable FEIN Mask setting is available on the Global Settings page of Citizen Access Setup. See [FEIN Mask Settings on page 63](#). This section provides instructional text to configure SSN and FEIN contact fields so you can leverage them towards data collection and data validation.

### To set SSN and FEIN contact field validation

1. Verify the SSN and FEIN fields are visible and/or required on the Enter Information page of registration.
  - a. Navigate to **General > Pages > Registration > Enter Information**.
  - b. Select the Contact Information section and mark or clear the check boxes for Visible and Required for SSN and FEIN.
2. Enable the FEIN Mask security setting on the Global Setting page. For more information, see [FEIN Mask Settings on page 63](#).
3. Associate the RegisterSubmitAfter event with the following scripts for validation during the registration process:
  - ACA\_PUBLICUSER\_Register\_AssociateRefContacts. This script associates the duplicate reference contact to the public user account. If there is not a duplicate

reference contact, Citizen Access creates a contact according to the public user input as a Citizen contact type.

4. Associate ApplicationSubmitAfter Event with the following script for validation during the record creation process:
  - ACA\_Cap\_AssociateReferenceContacts: This script associates the reference contact information to the public user record.
5. Associate the BeforeButton event in Page Flow configuration with the following script: For more information about Page flow, see [Associating Scripts with a Page on page 144](#).
  - ACA\_PageFlow\_Contacts\_SSN\_FEIN\_Validation. This script checks Civic Platform for a duplicate FEIN and SSN based on the public user input against the reference contact information.

## Registration Submit After Scripting Information

Your agency may want to customize which license types require agency activation. For example, an agency may want all plumbing licenses automatically activated when the plumbing licenses are added to a public user. If, however, the license is not a plumbing license, it follows default behavior to require the agency to activate it.

To set up this functionality, you must define a script and bind to the RegistrationSubmitAfter Event to auto-activate the licensed professional type. The script must have logic to determine the license type and then use the “isContinue” and PA\_EMAIL\_VERIFICATION settings to determine auto-activation. For information on how the settings affect the script, see [List 4: Registration Script Information on page 242](#).

**List 4: Registration Script Information**

<b>PA_EMAIL_VERIFICATION</b>	If set to N, no e-mail notification is sent and ALL of the registered accounts are automatically activated.  If set to Y, using the RegisterSubmitAfter script, some Licensed Professionals can be automatically activated or go to an inactive (or pending) state based on the “isContinue.”
<b>“isContinue”</b>	This is the output environment variable. The value is 0 or 1.  If set to 0, the Citizen Access account is deactivated and Civic Platform sends an “inactive” e-mail to the registered user and an “activation required” e-mail to the agency employee.  If set to 1, the Citizen Access account is automatically activated and Civic Platform sends the “activation” e-mail to the registered user.

## CHAPTER 13:

# CONFIGURING RECORD INQUIRY

Information exchange is one of the most critical elements to a successful business, especially when working with government services provided to the public. Citizen Access provides many types of searches so that public users can search for and view record information online. Your agency can customize search functionality so that you can control over what information you want to share and to whom you want to share with. Search functionality is customizable so that anonymous (non-registered) users can locate information. This means that your agency does not need to implement the registration process. In fact, Citizen Access is configurable so that your agency can offer a website where anonymous public users can only come to perform inquiries and you have control over what information is returned in the results list.

This chapter provides you with configuration information and features for record inquiry so you can filter result information and customize search forms throughout the various areas of the software. You can offer a global search to allow public users to search for information throughout the entire system from any page in Citizen Access. You can implement record type searches within the module, or extend search functionality from a module to include other defined modules. The licensed professional search functionality allows a public user to search the database for their license information. When public users perform the Provider/Education/Licensee search, they can search for a facility that offers examinations supporting the education requirements for a new license or renewal, or search for a food facility to check out the inspection results, or search for licensed professionals to view their credentials. Finally, you can enable public users to search and apply external APO data sources.

Independent of the search public users choose to locate information, you can filter search results and enable public users to export them in CSV format to their computer.

Preparing your site for inquiries is dependent upon multiple configurations in Civic Platform and ACA Admin. See [Chapter 11: Implementation Planning on page 201](#). The most vital pre-configuration element necessary for a successful implementation of record inquiry is record type configuration. Record types must be defined and displaying in Citizen Access. See [Chapter 9: Page Flow Configuration on page 132](#). In addition to the record type, you must perform additional configurations in Civic Platform and ACA Admin so that you can offer the additional information that the public may demand. For example, your agency may want to offer the ability to search for approved education courses offered by an education provider so that they can take the course and fulfill a requirement to renew a pharmaceutical license. The approved courses and providers must be pre-configured in Civic Platform before they can be searchable in Citizen Access.

**Note:** *Record replaces CAP. The term Record defines a broader range of items or forms that users manage within Civic Platform, such as application, case, license, permit, service request, and work order.*

**Note:** To set up the record inquiry, it is recommended best practice to refer to the implementation questions and tasks in [Configuring for Record Inquiry on page 206](#) in [Chapter 11: Implementation Planning on page 201](#). The questions help you assess the searching features you want to make available to the public. [Configuring Required Settings for Record Query on page 207](#) provides a comprehensive configuration list for record search functionality, including dependent settings outside of this registration chapter.

## Topics

- [Enabling Global Search](#)
- [Defining Module Search Functionality](#)
- [Defining Licensed Professional Searches](#)
- [Configuring Contact Template Record Searches](#)
- [Enabling Provider/Education/Licensee Search](#)
- [Customizing Food Facility Inspection Search](#)
- [Enabling External APO Search](#)
- [Modifying Search Pages and Filtering Data](#)
- [Exporting Search Results in CSV Format](#)

## Enabling Global Search

Administrators can configure Citizen Access to support a global search. Similar to the global search feature in Civic Platform, this feature allows public users to enter search criteria and search for information across modules and all records on any web page. For example, a public user can enter at least three characters in the search window and Citizen Access returns data elements meeting this criteria, such as records or addresses. Citizen Access retains the five latest searches by key word in a Recent Search drop-down list, which are accessible by clicking the drop-down arrow next to the search window. See [Figure 81: Viewing Global Search Results and Recent Searches](#). This feature supports the filter configurations and security permissions defined for public users. See [Configuring Cross Module Searches on page 248](#).

Figure 81: Viewing Global Search Results and Recent Searches

The screenshot shows a web interface for the Accela Civic Platform. At the top, there is a navigation bar with links for Home, Applications and Authorizations, Service Request, and Planning. Below the navigation bar, a search results page is displayed. The search term '07ABV' is entered in the search field. The results table shows 9 records found, with columns for Date, Record Number, Record Type, Agency, Module, Description, Project Name, and Address. The first few records are as follows:

Date	Record Number	Record Type	Agency	Module	Description	Project Name	Address
11/01/2007	07ABV-00000-00018	SR/Abandoned	FLAGSTAFF	ServiceRequest			2063 N Monte Vista FLAGSTAFF, AZ 85901
10/15/2007	07ABV-00000-00016	SR/Abandoned	FLAGSTAFF	ServiceRequest			111111111 N beige shangdi, FLAGSTAFF, AZ 85901
10/15/2007	07ABV-00000-00017	SR/Abandoned	FLAGSTAFF	ServiceRequest			11111-1111 80 Main, FLAGSTAFF, AZ 85901
10/12/2007	07ABV-00000-00015	SR/Abandoned	FLAGSTAFF	ServiceRequest			78 1st AVE, FLAGSTAFF, AZ 85901
08/24/2007	07ABV-00000-00005	SR/Abandoned	FLAGSTAFF	ServiceRequest			2200 Fourth, FLAGSTAFF, AZ 85901
08/17/2007	07ABV-00000-00003	SR/Abandoned	FLAGSTAFF	ServiceRequest			2200 N Fourth, FLAGSTAFF, AZ 85901
08/17/2007	07ABV-00000-00004	SR/Abandoned	FLAGSTAFF	ServiceRequest			0 E Fifth, FLAGSTAFF, AZ 85901
07/05/2007	07ABV-00000-00002	SR/Abandoned	FLAGSTAFF	ServiceRequest			100 Main, FLAGSTAFF, AZ 85901
06/09/2007	07ABV-00000-00001	SR/Abandoned	FLAGSTAFF	ServiceRequest			AZ 99999

On the right side of the search results page, there is a sidebar titled 'Recent Searches' which lists the following items: 07ABV, 99PTZ, 08GRW, Flagstaff, and Main. The entire sidebar area is highlighted with a red box.

Administrators must enable global search by marking the check box on the Global Settings page and marking the check boxes to indicate which data elements are grouped together and returned in a result list. Then, administrators customize the Global Search web page in the General Pages section to control what information you want to display to public users. For information on how to customize a web page, including how to control what fields display on a page, refer to [Chapter 10: Working with Web Pages on page 160](#).

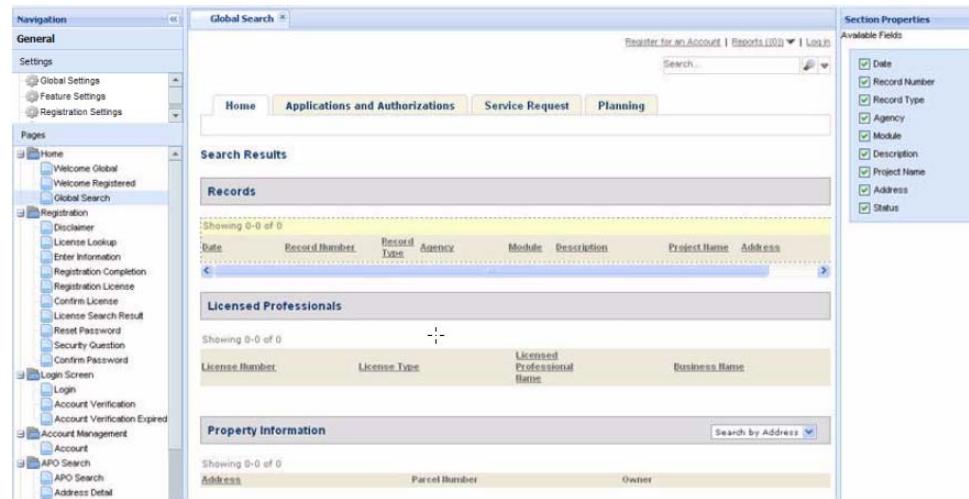
### To enable global search functionality

1. Navigate to the **Search Settings** area on the **Global Settings** page.
2. Enable global search functionality by marking the **Enable Global Search** check box.
3. Define which search groups are available for public user global search by marking the associated check box(es).

The screenshot shows the 'Global Settings' page with the 'Search Settings' section highlighted. The 'Global Search' checkbox is checked, and the 'Allow Search Groups' dropdown is set to 'Records'. Other options like 'Licensed Professionals' and 'Property Information' are also selected. Below this, there are additional settings for 'Cross Module Search', 'Address Range Search', 'Restrict Licensed Professional Results', and 'Allow Public users to export Search Results (in CSV format)'. The entire 'Global Search' group is highlighted with a red box.

4. Click the **Save** button.

5. Navigate to the **Global Search** Web page in the general pages **Home** folder to make any customizations. Refer to [Chapter 10: Working with Web Pages](#) on page 160.



**Note:** *Citizen Access displays the Global Search page only when there are multiple matching records. If there is only one matching record, Citizen Access directly displays the details of the record.*

6. Click **Save**.

*Citizen Access returns data elements meeting public user search criteria.*

## Defining Module Search Functionality

Each module you enable for Citizen Access can accommodate search functionality. You must configure what information you want to display to users and to whom. This includes configuring search forms to display and hide field information. Follow the configurations defined in this section to help you get the module prepared for record inquiry. See also, [Chapter 11: Implementation Planning](#) on page 201 to support you with preparing your entire site with search functionality.

### Topics

- [Enabling Module and APO Searches](#)
- [Configuring Cross Module Searches](#)
- [Filtering Results List by Application Status](#)
- [Enabling Address Range Search Functionality](#)
- [Configuring Role-based Search Definitions](#)
- [Defining Additional Search Criteria](#)

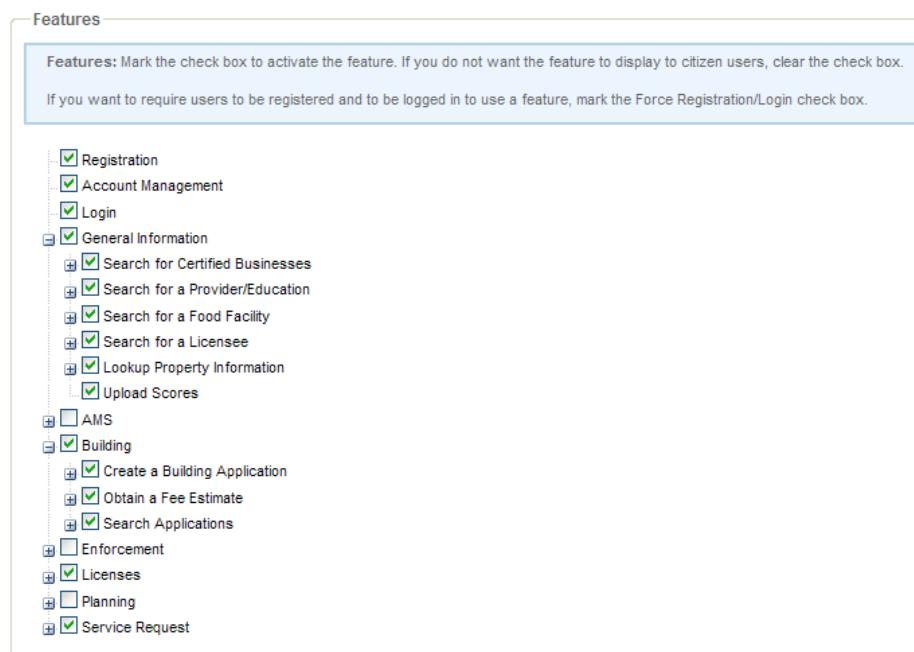
## Enabling Module and APO Searches

You can enable the ability for public users to search for records and property information right within a module and also right from the Welcome page. To display search links on the Welcome page and enable search functionality, you must set configurations on the Feature Settings page. You have the ability to restrict anonymous users from searching for any information. This is done by removing the search link from the anonymous user Welcome page and forcing the user to log in or register for an account before they can perform a search. See [Configuring Required Registration on page 85](#).

### To enable module and APO searches

1. Navigate to the Feature Settings page.

*Feature Settings page displays a column of check boxes in a tree view.*



2. Enable the ability to look up property information.
  - a. Expand the General Information section and mark the Lookup Property Information check box.
  - b. If necessary, expand the Lookup Property Information section and mark the Forced Registration/Login check box to restrict anonymous users from the search.
3. Enable module searches
  - a. Expand a module and mark the check box associated with search functionality. For example, in the Building module, mark the Search Applications check box. In the Enforcement module, mark the Search Code Enforcement Cases check box.
  - b. If necessary, expand the search section and mark the Forced Registration/Login check box to restrict anonymous users from performing a module search.

4. Click the **Save** button.

## Configuring Cross Module Searches

Public users can search for information in Citizen Access in a couple of different ways. They can perform a global search on any page by entering information in the global search window or they can perform a search on the Record Home page in a module by entering information in one or more of the available fields. They can contain the search within the module, expand it to other modules, and/or filter the results list to display their personal records only by marking the associated check boxes. See [Figure 82: Public User Personal Record List and Cross Module Search Options](#).

A cross module search is to search across modules. For example, a public user can enter search criteria in the building module to locate an address associated with a permit. Perhaps the search does not return any results, so the public user expands the search to include other modules to discover the address in question is attached to a service request, not a building permit. When the situation occurs that Citizen Access returns numerous search results, public users can filter the module or cross-module search results list to only display their personal records meeting the search criteria.

**Figure 82: Public User Personal Record List and Cross Module Search Options**

The screenshot shows the 'General Search' interface. At the top right is a dropdown menu labeled 'General Search'. Below it are two checkboxes: 'Search my records only' and 'Search across modules', with the latter being checked and highlighted with a red box. The search form includes fields for 'Record Number' (with a placeholder 'Adding text for team'), 'Application and Permit Type' (a dropdown menu), 'Project Name' (a text input field), 'Start Date' and 'End Date' (date pickers set to 11/25/2008 and 11/25/2009 respectively), 'License Type' (a dropdown menu), 'State License Number' (a text input field with placeholder 'CCB and BCD license numbers only.'), and 'First', 'Last', and 'Name of Business' (text input fields).

Administrators have control over what result information displays after a module or cross module search. This is done by enabling the cross module search feature on the Global Settings page and then defining which modules are available on the expanded module search on the associated module settings pages.

After configuration, public users can perform a search with Citizen Access returning data elements across modules that meet the individual module parameter criteria. This feature supports any defined record type filters applied to a module. For information on how to apply a record type filter to a module, see [Filtering Record Search Results on Module Settings Page on page 265](#).

### To configure the module search results

1. Navigate to the **Global Settings** page.
2. Go to **Search Settings > Additional Settings** and mark the **Enable Cross Module Search** check box.

**Global Settings**

**Search Settings**

Global Search: Mark the check box to enable Global Search. User will be able to search records, licensed professionals and property information globally across all Modules.  
 Allow Search Groups: Mark the check boxes to include which search groups can be searched by public user.  
 Enable Cross Module Search: Mark the check box to enable cross module search.  
 Enable Address Range Search: Mark the check box to enable search by address range.  
 Restrict Licensed Professional Results to only those associated with the user: Mark the checkbox to restrict search result only including Licensed Professionals associated with current citizen user.  
 Allow Public users to export Search Results (in CSV format): Mark the checkbox to allow the public user to export the search result list in CSV format.

**Global Search**

Enable Global Search  
 Allow Search Groups:  Records  Licensed Professionals  Property Information

**Additional Settings**

Enable Cross Module Search    
 Enable Address Range Search  
 Restrict Licensed Professional Results to only those associated with the user  
 Allow Public users to export Search Results (in CSV format)

3. Click **Save**.
4. Navigate to a **Module Settings** page, for example the Building Settings page.
5. Go to the **Cross-Module Search Settings** area and mark the check box associated to each module you want enabled for the cross-module search. These settings apply for this module only and are reflected when public users perform searches on the module Record Home page.

**Building Settings**

**Combine Button with Record Type**

Select a button using the dropdown below to view or modify its properties.  
 -Select a Button--

**Cross Module Search Settings**

Mark the check box ahead of the module which is wanted to allow search across.

Service Request  Planning

6. Click **Save**.

Public users have the ability to perform a search across allowed modules and also to restrict the search to their personal records by checking the applicable check boxes on the Record Home page.

## Filtering Results List by Application Status

The Application Status section on the Modular Settings page displays a navigation tree of all application status groups which any record types associate with in a module. See [Figure 83: Filtering Records by Application Status](#). Clear the check box next to the record statuses you want to restrict public users from viewing in the search result list. Mark the check box to include the records with the associated status for display. Citizen Access applies the record status filter to the records for a module.

**Note:** A helpful tip is to include any Status you want to restrict from view in an Application Status group. For example, you can restrict Applications with the Void status from view.

**Figure 83: Filtering Records by Application Status**



## Enabling Address Range Search Functionality

Your agency can control how public users can search for addresses. You can limit address search criteria to specific address information, or you can allow public users to enter criteria meeting an address range. For example, a contractor may want to search for all of his building permits in a development area, so he enters an address range search on a street.

**Note:** Currently APO lookup or global search does not support this feature.

Administrators must enable the address range search functionality on the Global Settings page.

### To enable address range search functionality

1. Navigate to the **Global Settings** page.
2. Go to **Search Settings > Additional Settings** and mark the **Enable Address Range Search** check box.

**Global Settings**

**Search Settings**

Global Search: Mark the check box to enable Global Search. User will be able to search records, licensed professionals and property information globally across all Modules.

Allow Search Groups: Mark the check boxes to include which search groups can be searched by public user.

Enable Cross Module Search: Mark the check box to enable cross module search.

Enable Address Range Search: Mark the check box to enable search by address range.

Restrict Licensed Professional Results to only those associated with the user: Mark the checkbox to restrict search result only including Licensed Professionals associated with current citizen user.

Allow Public users to export Search Results (in CSV format): Mark the checkbox to allow the public user to export the search result list in CSV format.

**Global Search**

Enable Global Search

Allow Search Groups:  Records  Licensed Professionals  Property Information

**Additional Settings**

Enable Cross Module Search

**Enable Address Range Search**

Restrict Licensed Professional Results to only those associated with the user

Allow Public users to export Search Results (in CSV format)

### 3. Click **Save**.

*Public users cannot enter an address range when performing a search. For example, the Street No. field has a range of 111-2000. Any building record matching the defined street no. address range shows in the results list.*

**General Search**

Record Number:

Application and Permit Type:

Project Name:

Start Date:  End Date:   
(mm/dd/yyyy) (mm/dd/yyyy)

License Type:  State License Number:   
CCB and BCD license numbers only.

First:  Last:  Name of Business:

Street No:  Direction:  Street Name:  Street Type:   
(e.g. N) (e.g. Main)

## Defining Additional Search Criteria

You can provide an Additional Search Criteria link for Contact search forms on the Record Home page. This allows public users to choose additional information relating to contact template fields or application-specific information fields to find a record. This feature also allows the public user to exclude field information from the search. To set this feature, you must mark the Additional Search Criteria setting options for each module on the Module Setting page. See [Record Search on page 121](#).

### To define additional search criteria

1. Navigate to the **Module Settings** page.

2. Go to the **Additional Search Criteria Settings** section of the **Record Search** area.

The screenshot shows the 'Record Search' configuration page. At the top, there are two sections: 'Cross Tab Search Settings' and 'Additional Search Criteria Settings'. Under 'Cross Tab Search Settings', there is a note: 'Mark the check box next to the tab that you want to include in the cross tab search.' Below this is a list of tabs: Building (checked), Land (unchecked), Trade Name Management (unchecked), Planning (checked), Asset (unchecked). The 'Additional Search Criteria Settings' section is highlighted with a red box. It contains two options: 'Enable Search by ASI' (checked) and 'Enable Search by Contact Template' (checked).

3. Mark the option to display the Additional Search Criteria link so that public users can search for records by ASI or Contact Template information. For more information about ASI and Contact Templates, see the *Accela Civic Platform Administrator Guide*.

*Citizen Access Setup displays the link based on the administrative setting.*

## Configuring Role-based Search Definitions

You can define who can search and view the records of the specified record types based on their user role in Citizen Access. See [Figure 84: Filtering Record Search Results](#). This feature filters search results so that Citizen Access only returns records of record type applicable to a public user's role in their search results list. For example, a licensed plumber can perform a search and see only plumbing permits. This filters the result list so the plumber does not have to see electrical permits on the results page.

To begin, decide if you want to set the same permissions for all record types or if you want to define permissions for each record type. Mark the **For All Record Types** option or the **For Each Record Type** option accordingly.

Then you can determine who can search and view records of any record types or of a specific record type. Mark the options which reflect this decision in the Filter Record Search Results area. You can choose one or more of the available assignment options. See [List 5: Role Assignment for Record Type Options](#). The default setting for a record type is All ACA Users. This makes the record type available for any public user role.

**Figure 84: Filtering Record Search Results**

Filter Record Search Results

Restrict who can view records in the record search for this module: Choose among Anonymous Users, Registered Users, Record Creator, Contact, Owner, Licensed Professional, and Specific Licensed Professional.

For All Record Types  For Each Record Type

Record Type	All ACA Users	Registered Users	Record Creator	Contact	Owner	Licensed Profes...	Specific Licensed Pro
AGIS building permit	<input checked="" type="checkbox"/>						
AIR Test Application	<input checked="" type="checkbox"/>						
All Categories-Residential	<input type="checkbox"/>						
AMCA Inspection Demo	<input checked="" type="checkbox"/>						
AMS/MM/MM/MM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ASI Renewal	<input type="checkbox"/>						
AutoAssignInspector	<input type="checkbox"/>						

**To configure role-based search definitions**

1. Navigate to a **Module Settings** page.
2. Go to the **Filter Record Search Results** section.
3. Choose one of the following:
  - For All Record Types
  - For Each Record Type

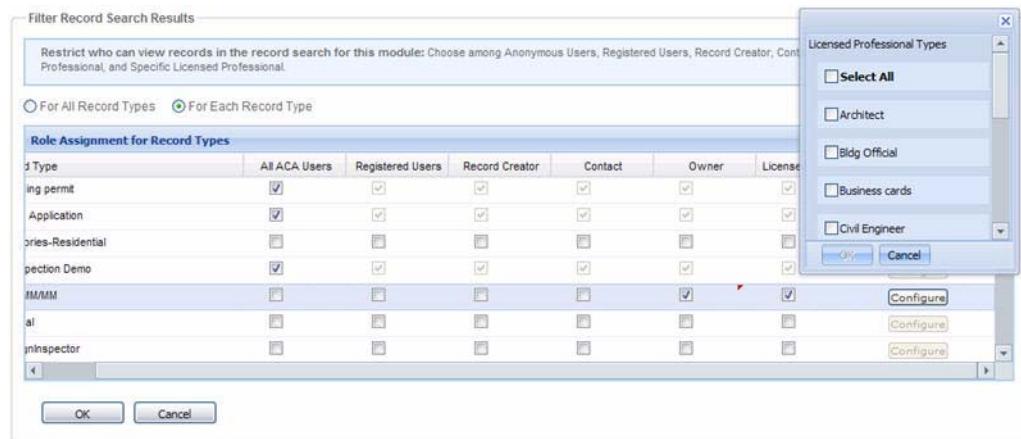
*Citizen Access Setup populates the Role Assignment for Record Types table. One line displays for All Record Type in the module Role definitions. A complete list of each Record Type in the module displays if you want to define user role settings for individual record types. See [Figure 84: Filtering Record Search Results](#).*

4. Mark or clear the check boxes in the **Role Assignment for Record Types** table. See [List 5: Role Assignment for Record Type Options](#).

*If you mark the Licensed Professional check box, the **Configure** button becomes active in the Specific Licensed Professionals column.*

- If necessary, click the **Configure** button to define specific licensed professionals with permissions to the record type.

*Citizen Access Setup displays a pop-up window of licensed professional types and a red flag to indicate changes.*



- Click the **OK** button.
- Click the **Save** button to save the changes to the Module Settings page.

#### List 5: Role Assignment for Record Type Options

All ACA Users	All public users who access Citizen Access including anonymous, or non-registered public users.
Registered Users	Public users with an Citizen Access registered account. This includes all registered non-licensed professionals and registered licensed professionals. It does not include anonymous users.
Record Creator	The public user associated with creating the record.
Contact	Any defined contact for the record.
Owner	The defined owner of the property relating to the record.
Licensed Professional	Public users with a license. This includes all licensed professional types. When you mark this check box, the <b>Configure</b> button becomes available in the Specific Licensed Professional column. This allows you to filter which licensed professionals have access to the record type.
Specific Licensed Professional	Public users that match a specific licensed professional types. This configuration becomes available after you mark the Licensed Professional check box and click the <b>Configure</b> button. Mark the check box next to a specific licensed professional type to grant access to the record type. Clear the check box to restrict permissions.

## Defining Licensed Professional Searches

Your agency has the option to limit the licensed professional search results to display only those licenses associated with the current user. This is particularly useful when a public user logs in to Citizen Access and wants to create a record for which the agency requires an associated

license for processing. When they search and select a license, Citizen Access only returns those licenses associated with their own account. For example, a contractor logs in to create an electrical permit, which requires a license for processing. The contractor clicks the search button to search and select one of his licenses to associate with the record. After entering search criteria, Citizen Access only returns those licenses matching the search criteria and associated with the contractor.

Mark a check box on the Global Settings page to enable functionality.

#### To enable licensed professional search

1. Navigate to the **Global Settings** page.
2. Go to the Search Settings area and mark the check box associated with **Restrict Licensed Professional Results to only those associated with the user**.

The screenshot shows the 'Search Settings' section of the Global Settings page. It includes a note about Global Search, Allow Search Groups, Enable Cross Module Search, Enable Address Range Search, Restrict Licensed Professional Results, and Allow Public users to export Search Results. The 'Restrict Licensed Professional Results to only those associated with the user' checkbox is highlighted with a red border.

3. Click the **Save** button.

## Configuring Contact Template Record Searches

You can leverage configurations in Civic Platform and Citizen Access Setup to create customized record search forms using contact template fields. For example, you can display the contact template field SSN to Citizen Access and use it to locate any records associated with that social security number. You can also provide public users with the ability to enter additional search criteria based on ASI and Contact Template field information to search for a record.

As a pre-requisite to this feature, you must establish a people (contact) template in Civic Platform. For details about People Templates, refer to "Establishing People Templates" in the *Accela Civic Platform Administrator Guide*. Set the display of contact template fields to Citizen Access in the people template attribute configuration. Then determine and configure the setting to display additional search criteria for each module on the Module Settings page. When field attributes are displayable, go to the record detail page, application-intake form, and search form to hide individual fields for customization and restriction.

You can also determine the layout of displayable contact template fields in a form by following the tasks in [Designing Form Layouts for Web Pages on page 169](#). Based on configurations, you can choose to make the contact template fields editable and follow the tasks in [Working with Fields on page 177](#) to customize the field label, field size, and add a watermark or instructional text functionality.

### To configure contact template searches

1. Define people template field display in Citizen Access. For additional information about People Templates, refer to "Establishing People Templates" in the *Accela Civic Platform Administrator Guide*.
  - a. Search and select the people (contact) template and attribute requiring Citizen Access Configuration.
  - b. Go to the ACA Display Configuration section of the page.

The screenshot shows the 'Attribute - Edit' configuration page for the 'SSN' attribute. The 'Attribute Template Name' is 'DRIVER' and the 'Attribute Type' is 'Driver'. The 'Attribute Name (Required)' is 'SSN'. The 'Label' is 'SSN', 'Label (Default)' is 'SSN', 'Description' is 'Social Security Number', and 'Default Value' is empty. Under 'Default Value (Default)', 'Unit' is set to 'or' with a dropdown menu showing 'New Unit'. The 'Data Type' is 'Text', 'Display Order' is '100', and 'Required Flag' is 'No'. The 'ACA Display Configuration' section is highlighted with a red border, containing options: 'Display', 'Display (including License Verification)', 'Hide', and 'Editable'. The 'Status' section shows 'Enable' selected. At the bottom are 'Submit' and 'Cancel' buttons.

- c. Mark the applicable option to set ACA Display Configuration.

<b>Display</b>	Mark this option if you want to display the attribute on the Record Detail, Application-Intake form, and Contact Search form in Citizen Access.
<b>Display (Including License Verification)</b>	Mark this option if you want to display the attribute information on the Licensee Detail page when performing a License Verification search.
<b>Hide</b>	Mark this option if you want to restrict the attribute from public users for online functionality.
<b>Editable</b>	Mark this option to set the ability to customize the label, field size, instructional text and helper text for Citizen Access.

- d. Click **Submit**.
2. Verify the Additional Search Criteria link is available in contact search forms on the Record Home page in applicable modules. For configuration information, see [Defining Additional Search Criteria on page 251](#).

Search by Contact

Contact Type:  Salutation:  Title:  First:  Middle:  Last:

Birth Date:  Gender:

Name of Business:

DBA/Trade Name:

SSN:  FEIN:

Address Line 1:

Address Line 2:

Address Line 3:

City:

State:

Zip:  P.O. Box:

Country:

Home Phone:  (+ ) Work Phone:  (+ ) Mobile Phone:  (+ )

Fax:  (+ )

e-Mail:

No records found.

3. Customize fields and layout as defined in [Designing Form Layouts for Web Pages on page 169](#) or [Working with Fields on page 177](#).
4. If applicable, verify the FEIN Mask settings and SSN Contact validation functionality is defined in Registration. For more information, see [Setting SSN and FEIN Contact Field Validation on page 241](#).

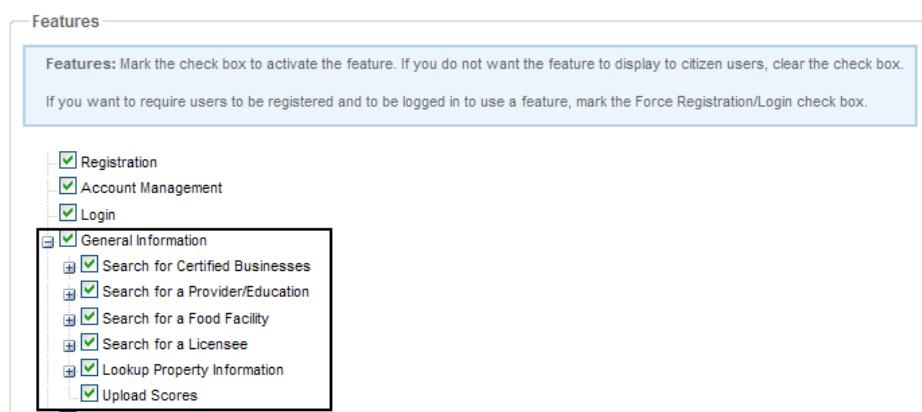
## Enabling Provider/Education/Licensee Search

Citizen Access is configurable to provide a specific search operation with targeted results for verifying licenses and licensed entities. This is particularly useful if you want to allow public users to verify the license of a contractor, doctor, food facility, or other licensed professional. For example, a public user can search for all licensed pharmacists in San Francisco, CA. From Citizen Access search results, a public user can select the license number to read about the licensee details including the state license number, business License expiration date, the license state and licensing board. Public users can also search for the licensed food facilities and select a business name or address to show the most recent inspections on the food facility. Food facility inspection results indicate a high score or grade when the facility complies with the

law, or a low score or grade when the facility commits no violations. For more information on food facility inspection, see [Dynamic Description Based on Address Type on page 263](#).

### To enable licensee search

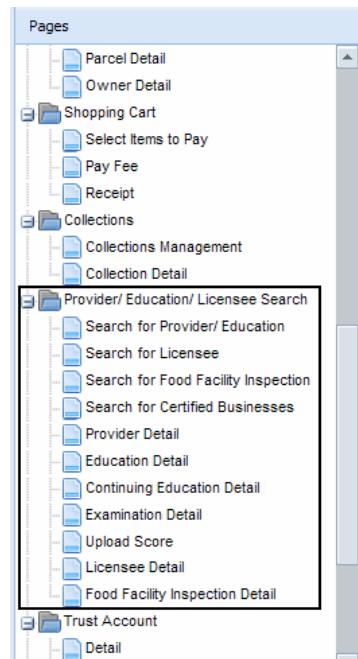
1. Navigate to the **Feature Setting** page.
2. Locate the **Search for a Licensee**, **Search for a Provider/Education**, and **Search for a Food Facility** items.
3. Mark the associated check boxes to enable the search functionality.



Citizen Access provides the **Search for Provider/Education**, **Search for Licensee** and **Search for a Food Facility** links on the Welcome Page table.



4. Go to the General Pages area and locate the **Provider/Education/Licensee Search** folder.



5. Customize the multiple web pages and search forms. For example, customize the Search for Licensee form. For instructions on how to customize a web page, see [Chapter 10: Working with Web Pages on page 160](#). For details on how to customize the search Forms, follow the same instructions in [Configuring Cross Module Searches on page 248](#).
  - When customizing the Search for Licensee form, you can select the Licensing Board field and then configure the License Type Options for the licensing boards.

Name	Value
Default Label	Licensing Board:
Field Label(Default...)	Licensing Board:
Field Label	Licensing Board:
Instructions	<a href="#">Click to Edit...</a>
Required	false
Licensing Board Opt...	<a href="#">Click to configure</a>
License Type Options	<a href="#">Click to configure</a>

When a public user enters criteria to search for licensee in the page, Citizen Access automatically filters the options available in the License Type field by the licensing board that the user selected in the Licensing Board field.

6. Click **Save** to apply changes.

*Citizen Access provides a Education/ Provider/ Licensee Search for public users.*

The screenshot shows the 'Search for Provider/Education/Licensee' page. At the top, there are navigation links for Home, Building, Service Request, and Planning. A search bar with a magnifying glass icon is also present. The main form has the following fields:

- License Type:** dropdown menu (value: --Select--)
- State License Number:** input field
- License State:** input field
- Provider Name:** input field
- Provider Number:** input field
- Licensing Board:** dropdown menu (value: --Select--)
- First Name:** input field
- Middle Initial:** input field
- Last Name:** input field
- Business Name:** input field
- Business Name 2:** input field
- Country:** dropdown menu (value: --Select--)
- Address1:** input field
- Address2:** input field
- Address3:** input field
- City:** input field
- State:** input field
- Zip:** input field
- Phone Number1:** input field
- Phone Number2:** input field
- Fax:** input field
- (+)**: input field
- Contractor's License #:** input field
- Contractor's Business Name:** input field

A 'Search for Licensee' dropdown menu is located at the top right of the search form area. A 'Search' button is located at the bottom left of the form.

## Customizing Food Facility Inspection Search

Inspections for a licensed food facility are food facility inspections. Public users can search for the food facilities and select a business name or address to show its most recent inspections and read the inspection results. This section provides you with the configurations to implement the food facility inspection search and to allow food facility inspections to display as search results when they meet the search criteria. See [Figure 85: Food Facility Inspection Page](#).

It is recommended best practice to implement the food facility inspection search using this checklist together with the “Inspections” section of both the *Accela Civic Platform Administrator Guide* and the *Accela Civic Platform User Guide*.

Figure 85: Food Facility Inspection Page

**Food Facility Inspection**  
**SANDY LIU**

<b>Food Facility Details</b>	
License Type: CONTACT	Type:
State License Number: 11CAP-00001561	Name:
License State: AK	Address: shenzhen
Licensing Board:	Phone 1:
Phone 2:	Business Name: SANDY LIU
FAX:	Business License Number:
E-mail:	Business License Expiration Date:
License Issue Date:	License Expiration Date:

<b>Current Status</b>	
	Last Inspection Date: 10/07/2011 Score: 120 Grade: Grade B
A	

<b>Previous Inspections</b>				
Showing 1-5 of 8				
<u>inspection Type</u>	<u>Result</u>	<u>Score</u>	<u>Grade</u>	<u>Major Violations</u>
building	Acceptable	120	Grade B	No major violations observed
<u>Fire schedule</u>	<u>Acceptable</u>	<u>200</u>	<u>Grade A</u>	<u>No major violations observed</u>
<u>inspection</u>	<u>Unacceptable</u>	<u>52</u>	<u>Close</u>	<u>Verify accuracy of shipment. Survey the plants in the shipment and take general count of the plants to see if your inventory matches the type of plants, container size, and number of plants on the original manifest and certificates.</u>
		B		<u>Clear</u>

**A** Grade card. Indicates the inspection result of the food facility.

**B** Guide sheet items. Guide sheet items that commit major violation are listed in the Major Violation column.

### To display food facility inspection search results

1. Make sure the **Search for food facility inspection** link displays on the Home page. See [Enabling Provider/Education/Licensee Search on page 257](#).
2. Customize the Search for Food Facility Inspection page and the Food Facility Inspection Detail page located in the Provider/Education/Licensee Search folder. For customizing steps, see [Chapter 10: Working with Web Pages on page 160](#).
3. Configure the Standard Choice FOOD\_FACILITY\_INSPECTION.

This Standard Choice controls the food facility search functionality in Citizen Access with various Standard Choice Values. For information on configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

4. Create a record intended to conduct inspections on the food facility.
5. Create a licensed professional for the food facility and associate it to the record you just created. Pay attention to the following fields of the licensed professional.
  - Fill the **State License #** field with the value of **Alt ID** field of the record.
  - Fill **License Type** with one of the license types specified in Standard Choice Value RELATED\_LICENSE\_TYPES as described in [step 3](#).
- For instructions on creating a licensed professional, refer to the “People” section in the *Accela Civic Platform Administrator Guide*.
6. If necessary, complete the follow sub-steps to display the grade card that represents an inspection result to the Food Facility Inspection page.
  - a. Create values in the Standard Choice LOGO\_TYPE-CATEGORY. For example, **Grade A**, **Grade B**, and **Grade C**. For information on configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.  
It is used to upload images for each grade card displayed in the Food Facility Inspection page.
  - b. Upload images.  
Each result or grade value defined in the previous substep is associated with an image. For detailed information about uploading image, see “Displaying a Logo or Grade Card” in the *Accela Civic Platform Administrator Guide*.
- c. Associate images to inspection results. See “Editing an Inspection Result Group” in the *Accela Civic Platform Administrator Guide*.
7. If necessary, configure inspection Result, Grade, and Score to display them to the Food Facility Inspection page. See the “Inspections” section in the *Accela Civic Platform Administrator Guide*.
8. If necessary, display the major violation result in the Food Facility Inspection page. See “Editing a Guide Sheet” in the *Accela Civic Platform Administrator Guide*.  
If an inspection has guide sheet items that committed to major violation, the item names display in the Major Violation column; if the inspection has no guide sheet items committing to major violation, the column displays “no major violation” for this inspection.

## Enabling External APO Search

Your agency can configure a method for public users to search and apply external APO (Address, Parcel, Owner) information. A super agency or its sub agencies may want to use this feature to maintain the minimum APO repository.

**Note:** *Citizen Access only supports external data sources through a web service connection.*

For information on the Standard Choices that enable external APO search, refer to [Table 11: Standard Choice Configuration for External APO Search on page 263](#). For information on configuring the Standard Choices, refer to the [Accela Civic Platform Configuration Reference](#).

**Table 11: Standard Choice Configuration for External APO Search**

Standard Choice	Description
EXTERNAL_ADDRESS_SOURCE	Configures this Standard Choice to access address information from external APO sources.
EXTERNAL_OWNER_SOURCE	Configures this Standard Choice to access owner information from external APO sources.
EXTERNAL_PARCEL_SOURCE	Configures this Standard Choice to access parcel information from external APO sources.
REF_ADDRESS_TYPE	Configures this Standard Choice to set a list of values that public users can look up and add to a specific address type group. You can also configure a description for each address type. See <a href="#">Dynamic Description Based on Address Type</a> .

## Dynamic Description Based on Address Type

You can display dynamic descriptive text based on the address type a citizen searches for. For example, if a citizen searches for an address type that you no longer provide services for, you can display messaging and links to direct the citizen to the appropriate website.

### To add descriptive text based on the address type searched for in Citizen Access:

1. Login to Civic Platform Classic Administration.
2. Navigate to Standard Choices > REF\_ADDRESS\_TYPE.
3. Select an address type.
4. In the value description field:
  - a. Enter a pipe character ( | ) to separate the existing value description (displayed as address type drop-down list item) from the descriptive text you want to display in Citizen Access.
  - b. Enter the text and html links you want to display when a citizen searches for the address type. Links must be formatted using standard html.

### Standard Choices Item - Edit

Use this form to set up a Standard Choices Item.

**Standard Choices Item Name:** REF\_ADDRESS\_TYPE

**Description:**  
(250 char max)

**Status:**  Enable  Disable

**Type:**  System Switch  Shared drop-down  EMSE  Business Configuration

Pipe character, followed by text  
to be displayed in Citizen Access

#### Standard Choices Value

#### Value Desc

Asset Address

Asset Address

Parcel Address

Parcel Address | You have entered an address that is serviced by the City of Portland

Right of Way

Right of Way Address

Street Row

Street Address

**Update**

**Add**

**Cancel**

### 5. Click Update.

When a citizen searches for the address type, your descriptive text and links display:

The screenshot shows a search interface with fields for Street No., Direction, Street Name, Street Suffix, Unit No., and City. Below these fields are 'Search' and 'Clear' buttons. A message 'Select one address(1 items): Showing 1-1 of 1' is displayed above a table. The table has columns: Action, Address, Description, City, State Zip, Parcel, and Owner. One row is shown for '2219 SE 68TH AVE, PORTLAND OR 97215'. At the bottom of the page, there is a red-bordered message box containing the text: 'You have entered an address that is serviced by the City of Portland. The City of Portland does not participate in the State ePermitting Program. Please click [here](#) to be redirected to the City of Portland's online permitting system.'

Action	Address	Description	City	State Zip	Parcel	Owner
Select	2219 SE 68TH AVE, PORTLAND OR 97215		PORLAND	OR 97215	1S2E05CC05400	

## Modifying Search Pages and Filtering Data

You can customize which information is available for public users to view when performing searches. This section describes how to configure the availability or restriction of record type and APO information.

### Topics

- Filtering Record Search Results on Module Settings Page

- Configuring Search Forms with APO Template Fields
- Modifying the APO Look Up Section
- Displaying or Hiding Fields on Search Forms
- Enabling Searching Records of Disabled Record Types
- Filtering Address Fields
- Exposing ASI Fields on the Record Home Page
- Customizing the Contact Search Form

## Filtering Record Search Results on Module Settings Page

You can configure the Filter Record Search Results section on the Module Settings page. This includes a setting of who can view records in the General Search. You chose either ALL ACA Users, Record Creator and Licensed Professional, or Record Creator. For detailed information, see [Filter Record Search Results on page 113](#).

## Configuring Search Forms with APO Template Fields

You can configure Civic Platform and Citizen Access Setup to create customized search forms for records and APO (Address, Parcel, and Owner) using APO template fields. For example, you can display the parcel template field “Property Type” in the Look Up by Parcel Information form and then public users can use that field to locate any parcels of a specific property type.

As a pre-requisite to supporting searches by APO template field, you must create an APO template in Civic Platform. The template fields are attributes of APO (Address, Parcel, or Owner) templates. All active attributes with the ACA Displayable flag set to Yes are available in the following search forms in Citizen Access Setup:

- Work Location Lookup, Parcel Information Lookup, and Owner Information Lookup sections of the <Module> Information page;
- Search by Address section of the Record Home page; and
- Look Up by Address, Look Up by Parcel Information, and Look Up by Owner sections of the APO Search page.

When a template field is displayable, you can determine the layout of that field in a form by following the tasks in [Designing Form Layouts for Web Pages on page 169](#). Based on configurations, you can add a watermark or instructional text by following the tasks in [Working with Fields on page 177](#).

### To configure searches by APO template attribute

1. Define the display of APO template attributes to Citizen Access.

For additional information about APO Templates, see “Managing APO Templates” in the *Accela Civic Platform Administrator Guide*.

- a. Search and select the APO template and attribute requiring Citizen Access Configuration.

The screenshot shows the 'Attribute Template's Attribute - Edit' configuration page. Key fields include:

- Attribute Template Name:** OWNER
- Attribute Type:** OWNER
- Attribute Name \* :** DEEDPAGE
- Label:** Deed Page
- Description:** (empty)
- Default Value:** (empty)
- Unit:** (dropdown) or **New Unit:** (empty)
- Data Type:** Text
- Display Order:** 20
- Required Flag:**  Yes  No
- ACA Displayable:**  Yes  No (highlighted with a red border)
- Record Searchable:**  Yes  No
- Status:**  Enable  Disable

At the bottom are **Submit** and **Cancel** buttons.

- b. If you want to display the attribute as an additional field in Citizen Access, select **Yes** from the ACA Displayable field; otherwise, select **No**.
2. Customize fields and layout as defined in [Designing Form Layouts for Web Pages on page 169](#) or [Working with Fields on page 177](#).

## Modifying the APO Look Up Section

From the APO Search page, you can determine which fields can display to the search form as the search filters. You can decide what type of information public users can search for, Address, Parcel, or Owner information. For example, you can allow public users to search for Address and Parcel information, but no Owner information. You can also configure the fields in the APO Details pages to define which information Citizen Access returns after public users perform a search using Address, Parcel, or Owner information.

Your agency can provide public users with the ability to look up property information by licensed professional. Public users enter the licensed professional search criteria. After choosing a licensed professional from the results list, Citizen Access displays any associated property information. This allows public users to view properties in their jurisdiction that a contractor is working on.

To enable property look up functionality, you must first enable **Lookup Property Information** check box on the Feature Settings page. See [Feature Setting Configurations on page 82](#).

### To modify the APO Look Up section

1. From **ACA Admin**, open the **APO Search** page in the General panel.
2. Select the Look Up by Address section and double-click the **Look up by Address** drop-down field.

*Citizen Access Setup displays the entire section in a yellow box.*

3. Click the Field Property **Choice Value** cell to view the available options in the search list.
4. To define which type of information display for public users to perform search, mark the check boxes for the desired items and clear the check boxes for the unwanted items.

*Citizen Access Setup displays the selected items in the drop-down list. Public users can select any type of information to perform the search.*

The screenshot shows the 'APO Search' interface. On the left, there's a search form with fields for Street Number, Direction, Street Name, Street Type, Unit Type, Unit No., City, State, Zip, Address Date (set to 2011), and Address Number. Below the search form is a 'Look Up by Address' dropdown menu. On the right, a 'Field Properties' dialog box is open, showing a table of available fields. One row in the table has a 'Value' cell containing 'Click to configure'. An arrow points from this cell to a larger 'Available Fields' window. This window lists several search options: 'Look Up by Address', 'Look Up by Address', 'Look Up by Parcel Information', 'Look Up by Record Information', and 'Look Up by Licensed Professional'. The last option is highlighted with a blue border. At the bottom of the 'Available Fields' window are 'OK' and 'Cancel' buttons.

The screenshot shows the 'Look Up Property Information' search form. It includes fields for Street Number, Direction, Street Name, Street Type, Unit Type, Unit No., City, State, Zip, Address Date (set to 2011), and Address Number. Below these is a 'Look Up by Address' dropdown menu. The 'Look Up by Address' option is highlighted with a blue border. At the bottom of the form are 'OK' and 'Cancel' buttons.

5. To set which fields display to the search form as the search filters, select any of the APO items from the drop-down list in the Look Up section, and mark the check boxes next to the fields that you want to be search filters in the Available Fields window.

**Note:** The Available Fields window only lists APO standard fields. For instructions on how to define the display of APO template fields on search forms, see [Dynamic Description Based on Address Type on page 263](#).

The screenshot shows the 'Look Up Property Information' search interface. It includes fields for Street Number, Direction, Street Name, Street Type, Unit Type, Unit No., City, State, Zip, and Residential Address? (Yes/No). There is also a checkbox for 'Include Disabled Addresses' and a 'Look Up' button. To the right, the 'Field Properties' window is open, showing sections for 'Field Properties' and 'Available Fields'. Under 'Field Properties', there is a table with columns 'Name' and 'Value', containing entries like 'Look Up Options' and 'Section Instructions'. Under 'Available Fields', there is a table with columns 'Field' and 'Visible', listing various address-related fields like Street Number, Direction, Street Name, Street Type, Unit Type, Unit No., City, State, Zip, and 'Include Disabled Addresses'.

- To define which field values Citizen Access returns after public users perform a search using Address, Parcel, or Owner information, double click one of the search result sections, and mark the check boxes next to the fields that you want to enable in the Available Fields window.

**Note:** Citizen Access displays the APO Search Result page only when there are multiple matching results. If there is only one matching result, Citizen Access directly displays the details of the address, parcel or owner record.

The screenshot shows the 'Look Up by Parcel Information' search interface. It includes fields for Parcel Number, Lot, Block, Subdivision, P.O. BOX (T), Recording Date, Property Type, Distance (T), and a checkbox for 'Include Retired Parcels'. There are 'Look Up' and 'Clear' buttons. Below the search form is a table header with columns: Date, Record Number, Record Type, Project Name, and Related Records. A red arrow points from the 'Related Records' column in the table header to the 'Related Records' checkbox in the 'Available Fields' window. To the right, the 'Available Fields' window is open, showing a table with columns 'Name' and 'Value'. The 'Value' column contains the value '10' for 'Rows Per Page'. Under 'Available Fields', there is a list of checked items: Date, Record Number, Record Type, Project Name, and Related Records.

- Click the **Save** button.

## Displaying or Hiding Fields on Search Forms

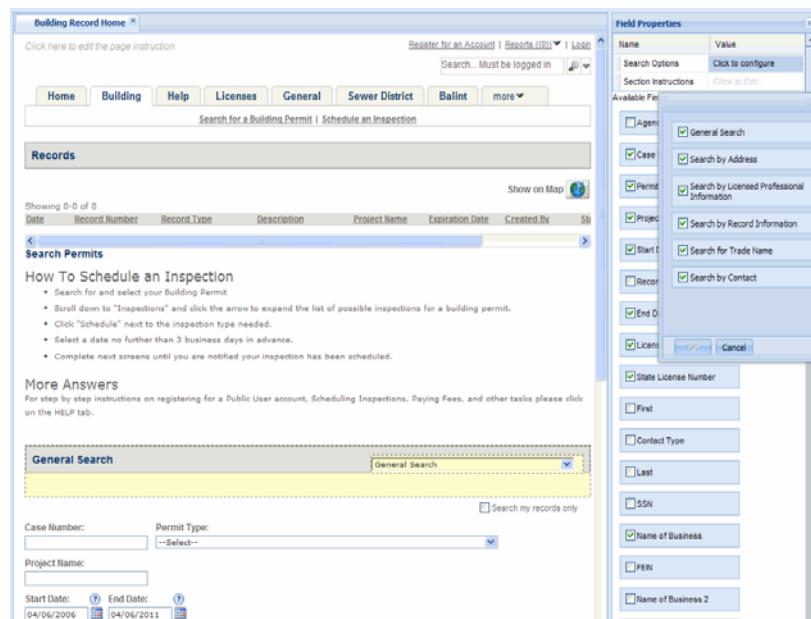
Administrators can control which fields display on search forms in web pages. For example, you can choose to remove all fields on the Owner Search form except for the Last Name field and the First Name field.

Display or hide available fields on a search form by marking or clearing the associated field check box. For more information about web page configurations, see [Chapter 10: Working with Web Pages on page 160](#).

**Note:** You cannot display or hide APO template fields on search forms through Citizen Access Setup. For instructions on how to define the display of APO template fields to Citizen Access, see [Dynamic Description Based on Address Type on page 263](#).

### To display or hide search fields on a search form

1. Navigate to a module and go to the Record Home page.
2. Go to the **General Search** section.
3. Control which search forms you want available to public users.
  - a. Click the General Search heading to enable it for modification.
  - b. Go to the Search Options in the Field Properties area.
  - c. Mark or clear the check box associated with each search option to display or hide the search option from the General Search drop-down list with its associated search form.



- d. Click **OK** to apply changes.

4. Modify Search Forms.
  - a. Select each enabled search option from the General Search drop-down list to access the associated search form. For example, click the Search by Address search option and the Search Address form displays in the General Search area for modification.
  - b. Go to the **Available Fields** area to mark or clear the check box(es) associated with the available fields to display or hide field information.
5. Modify the search result list.
  - a. Double click one of the search result sections
  - b. Go to the **Available Fields** area to mark or clear the check box(es) associated with the available fields to display or hide the field columns in the search result list.

**Note:** *Citizen Access displays the search result list only when there are multiple matching results. If there is only one matching result, Citizen Access directly displays the details of matching record.*

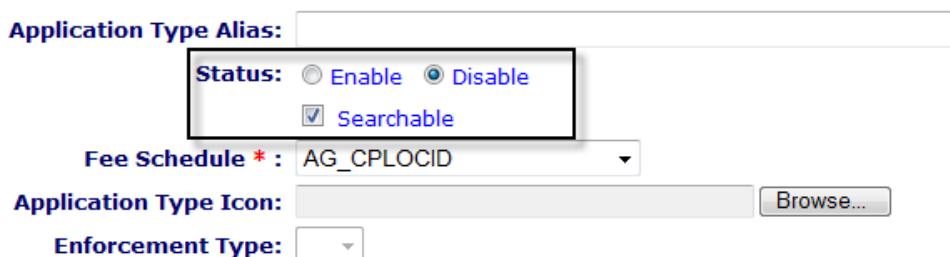
6. Click **Save**.

## Enabling Searching Records of Disabled Record Types

Users create records of an active (enabled) record type, and those records are searchable. However, if the record type is later disabled for some reason, those records created previously can be set to either searchable or not.

### To set the records of disabled record type to be searchable or not

1. Log in to Civic Platform.
2. Navigate to **Admin Tools > Application > Application Types**.  
*Civic Platform displays the Application Type tree.*
3. Select an existing application type from the tree and click **Edit** button.  
*Civic Platform displays the Application Category - Edit page.*



The screenshot shows the 'Application Category - Edit' page. At the top, there is a field labeled 'Application Type Alias:' with a dropdown arrow. Below it is a section for 'Status' with two radio buttons: 'Enable' (unselected) and 'Disable' (selected). Underneath the status section is a checkbox labeled 'Searchable' which is checked. Further down the page, there is a 'Fee Schedule \*:' dropdown menu set to 'AG\_CPLCID'. To the right of the dropdown is a 'Browse...' button. Below the dropdown is a field labeled 'Application Type Icon:' with a browse button to its right. At the bottom left is a field labeled 'Enforcement Type:' with a dropdown arrow.

4. Locate the **Status** option. Select the **Disable** option if the current status is Enable.
  - To allow records of the record type to be searchable, mark the **Searchable** check box.

- Otherwise, clear the **Searchable** check box.
5. Click the **Save** button.

## Filtering Address Fields

You can define which Address fields you want to display in the Address Search and Address Detail areas in Citizen Access. Citizen Access lists all address fields defined in the Civic Platform database as options for you to use. Enable or disable address fields for the Address Search and Address Detail areas for a module on the Record Home page and the <Module> Information page in Citizen Access Setup.

### To filter address fields

1. Navigate to Citizen Access Setup and select a Modular tab.

*Citizen Access displays modular information*

2. Configure the correct address fields to display in the Address General Search area.
  - a. Go to the Record Home page
  - b. Select Search by Address from the General Search drop-down list.

*Citizen Access displays the Search by Address fields with a yellow box around the area to indicate that you can make modifications.*

3. Navigate to the right panel and mark or clear the check boxes next to the available address fields you want to display or hide.

The screenshot shows the 'Building Record Home' page. On the left, there's a search bar and a table header for 'Records'. Below it, sections for 'Search Permits' and 'How To Schedule an Inspection' are visible. On the right, a 'Field Properties' panel is open, showing a list of address fields with checkboxes. A yellow dashed box highlights the 'Available Fields' section of the panel.

Name	Value
Search Options	Click to configure
Section Instructions	Click to Edit...
<b>Available Fields</b>	
<input checked="" type="checkbox"/>	Street No.
<input type="checkbox"/>	Direction
<input checked="" type="checkbox"/>	Street Name
<input checked="" type="checkbox"/>	Street Type
<input checked="" type="checkbox"/>	Unit Type
<input checked="" type="checkbox"/>	Unit No.
<input checked="" type="checkbox"/>	City
<input checked="" type="checkbox"/>	State
<input checked="" type="checkbox"/>	Zip
<input type="checkbox"/>	Start Fraction
<input type="checkbox"/>	Street # (end)
<input type="checkbox"/>	End Fraction
<input type="checkbox"/>	Prefix
<input type="checkbox"/>	Street Suffix
<input type="checkbox"/>	Unit # (end)
<input type="checkbox"/>	Secondary Road
<input type="checkbox"/>	Secondary Road Number

- d. Click the **Save** button.
3. Configure the correct address fields to display in the Work Location Lookup area.
    - a. Go to the <Module> Information page  
*Citizen Access displays the Work Location Lookup area.*
    - b. Select the Work Location Lookup area.  
*Citizen Access displays the area with a yellow box around the area to indicate you can make modifications.*
    - c. Navigate to the right panel and mark or clear the check boxes next to the available address fields you want to display or hide.

Name	Value
Default La...	Work Locat...
Section La...	Work Locat...
<b>Available Fields</b>	
<input checked="" type="checkbox"/>	Street No
<input checked="" type="checkbox"/>	Direction
<input checked="" type="checkbox"/>	Street Name
<input checked="" type="checkbox"/>	Street Type
<input checked="" type="checkbox"/>	Unit Type
<input checked="" type="checkbox"/>	Unit No
<input checked="" type="checkbox"/>	City
<input checked="" type="checkbox"/>	State
<input checked="" type="checkbox"/>	Zip
<input checked="" type="checkbox"/>	Prefix
<input checked="" type="checkbox"/>	StreetEnd #{end}
<input checked="" type="checkbox"/>	Unit #{end}
<input checked="" type="checkbox"/>	County
<input checked="" type="checkbox"/>	Country
<input checked="" type="checkbox"/>	Start Fraction
<input checked="" type="checkbox"/>	End Fraction
<input checked="" type="checkbox"/>	Address Type Flag
<input checked="" type="checkbox"/>	Street Suffix(Direction)
<input checked="" type="checkbox"/>	Description
<input checked="" type="checkbox"/>	Distance
<input checked="" type="checkbox"/>	Secondary Road
<input checked="" type="checkbox"/>	Secondary Road Number
<input checked="" type="checkbox"/>	Inspection District Prefix
<input checked="" type="checkbox"/>	Inspection District
<input checked="" type="checkbox"/>	Neighborhood Prefix
<input checked="" type="checkbox"/>	Neighborhood
<input checked="" type="checkbox"/>	X Coordinator

- d. Click the **Save** button.

## Exposing ASI Fields on the Record Home Page

You can enable public users to search for records by associated application-specific information (ASI). When you configure the ASI fields, a Search Additional Criteria option displays in the search form which you can click to expand to view and search by the ASI fields associated with the record type. Each ASI field group displays on the search form under the ASI subgroup name. See [Figure 86: Citizen Access Public User Search Form Displaying Collapsed ASI Fields](#) and [Figure 87: Citizen Access Public User Search Form Displaying Expanded ASI Fields](#) for an example of the way the ASI fields display on the search page.

For example, you want the builder to be able to search for a town home building permit based on the number of bedrooms and bathrooms planned for the project. When the builder navigates to the Building Permits Search page, scrolls to the General Search section, and clicks the Search Additional Criteria button, a # of Bedrooms field, a # of Bathrooms field, and other associated application-specific information fields display. The builder enters a value in the

relevant fields and clicks the Search button. Citizen Access runs the search and lists all of the records that match the builder's criteria.

To enable this feature for public users, you must create the ASI group code and corresponding subgroups and fields, apply the group code to the application type, and ensure that public user ASI security setting for the ASI group is set to Full Access. For more information about managing application-specific information, refer to the "Working with Application Specific Information" chapter of the *Accela Civic Platform Administrator Guide*. If the user's security permissions for the ASI group are read-only or no access, the user cannot search with the fields. For more information about managing ASI security permissions, see "Security Policies" in the *Accela Civic Platform Administrator Guide*.

ASI fields can apply to multiple record types. It is a good idea to limit in Citizen Access the record types that display the ASI fields. This keeps the search results to a manageable number of records, especially if the user only enters values in a few of the search criteria fields. On the Citizen Access Record Home page, you can filter record types, customize field property for new exposed address fields, and customize the field properties and related labels for the ASI search section. However, you can only change the application-specific information group, subgroup, and field names in Civic Platform. For more information about changing field property values, see [Changing Text and Display with Property Values on page 163](#).

You can also filter the record types by agency code. When you set this option, the public user must select the agency from the Agency drop-down list to access the filtered list of available record types. By filtering the record types by agency code, you further limit the record types and related ASI fields available for the search. For more information about sharing information across agencies, see [Sharing Information between Agencies on page 539](#).

**Figure 86: Citizen Access Public User Search Form Displaying Collapsed ASI Fields**

The screenshot shows the Citizen Access Public User Search Form. At the top, there is a navigation bar with tabs: Home, Development, Fire, Gas Well, Planning, Licenses, and AMS. Below the navigation bar are three links: Apply for Permit, Search Applications and Permits, and Schedule an Inspection. The main area is titled 'Records' and contains a 'Search for Records' section. This section includes a list of search criteria: Site Address, Contractor License Information, Parcel Number, Record Information, and Contact Information. Below this is a dropdown menu labeled 'General Search' with a 'General Search' button. To the right of the dropdown is a checkbox labeled 'Search All Records'. The search form is divided into several sections: 'Record Number' and 'Record Type' (dropdown), 'Project Name' with date fields for 'Start Date' (06/19/2008) and 'End Date' (06/24/2014), 'License Type' (dropdown), 'State License Number' (text input), 'First' and 'Last' names (text inputs), and 'Name of Business' (text input). There is also a section for 'Street No.', 'Direction', 'Street Name', 'Street Type', 'Suffix Direction', and 'Zip' (all with dropdown menus). A red-bordered button labeled 'Search Additional Criteria' is located at the bottom left. At the very bottom are 'Search' and 'Clear' buttons.

**Figure 87: Citizen Access Public User Search Form Displaying Expanded ASI Fields**

The screenshot shows a search interface titled "General Search" with a dropdown menu set to "General Search". At the top right is a checkbox labeled "Search All Records". Below it, there are several search criteria fields:

- "Record Number:" and "Record Type:" dropdowns. The "Record Type:" dropdown is currently set to "Addition Commercial Building Permit".
- "Project Name:" text input field.
- "Start Date:" and "End Date:" date pickers, both set to "06/19/2008" and "06/24/2014" respectively.
- "License Type:" and "State License Number:" dropdowns.
- "First:" and "Last:" text inputs.
- "Name of Business:" text input.
- "Street No.:" and "Direction:" dropdowns.
- "Street Name:" and "Street Type:" dropdowns.
- "Suffix Direction:" and "Zip:" dropdowns.

A red box highlights a section containing three groups of information:

- ▼ Do not include Additional Criteria**
- THIRD PARTY INFORMATION**: "3rd Party Company:" dropdown.
- MISCELLANEOUS INFORMATION**: "Commercial/Residential:" dropdown.
- OCCUPANCY INFORMATION**: "C of O Issued:" dropdown.

At the bottom left are "Search" and "Clear" buttons.

**To expose the ASI fields on the record search page**

1. Go to **Civic Platform > Classic Administration**.

*Civic Platform Classic Administration pages display showing Admin Tools and Daily tabs.*

2. Navigate to **Admin Tools > Application > Application Specific Info**.

*Civic Platform displays the Application-Specific Info - Search page.*

3. Create a new application-specific info group or editing an existing group code.

For more information about creating or editing a new application-specific information group code, refer to “Working with Application Specific Information” in the *Accela Civic Platform Administrator Guide*.

*Civic Platform displays the Application-Specific Info Group - Add or Edit page.*

The screenshot shows the 'Application Specific Info Group - Add' form. It includes fields for Application Spec Info Group Code, Subgroup, Table Group, Display Order, 1st Field Label, Field Type (Text), Display Order, Default Value, Unit, Fee Indicator, Required Flag, Req for Fee Calc, Supervisor Edit Only, Searchable Flag, Max Len, Display Len, ACA Displayable (radio buttons for Yes, Hidden, No), ACA Searchable (radio buttons for Yes, No), Justification, Default APO GIS Layer, Location Query, Display new ASI in old Caps, and Status (Enable, Disable). The 'ACA Displayable' and 'ACA Searchable' sections are highlighted with a red box.

The screenshot shows the 'Application Specific Info' page with a table of fields. The columns include Field Label (Default), Field Label, Type, Display Order, Fee Indicator, Unit, Default Value, Required, Req for Fee Calc, Supervisor Edit Only, Searchable, Max Len, Display Len, ACA Displayable, ACA Searchable, Justification, and Status. The 'ACA Displayable' and 'ACA Searchable' columns for several rows are highlighted with a red box.

**4. For each ASI field you want available for the record search in Citizen Access:**

- In the Application Specific Group Info - Add page, mark the Yes radio button next to the ACA Displayable and the ACA Searchable options.
- In the Application Specific Group Info - Edit page, choose the Yes option from the drop-down list below the ACA Displayable and ACA Searchable option.

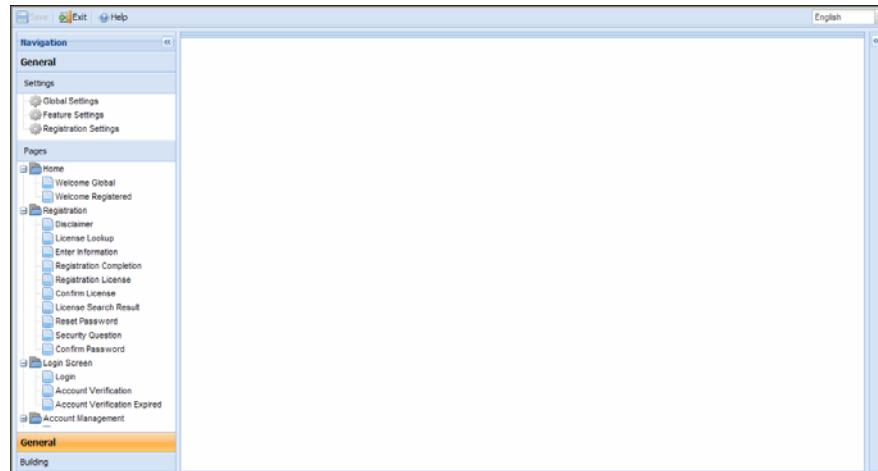
- There are several combinations of settings for the ACA Displayable and ACA Searchable radio buttons:

**Note:** *The choice of Hidden for the ACA Displayable radio button is used for expressions when the value from a field not displayed on the form is either updated by the expression or the value is used in the expression criteria.*

- If you mark the Yes radio buttons for both the ACA Displayable and ACA Searchable options, the ASI field is available for use in the search form.
- If you mark the Yes radio button for ACA Displayable, and mark the No radio button for ACA Searchable, the ASI field displays as read only in the search form.
- If you mark the No radio buttons for both ACA Displayable and ACA Searchable, the ASI field does not display in the search form. It is recommended that you not use this case. If you do not want the field to display in the search form, mark both radio buttons as No.

5. Click the **Submit** button.
6. Navigate to Civic Platform Administration.
7. In the **Setup** portlet, click the **Administration** item and choose **ACA Admin** from the drop-down menu.

*Civic Platform displays the Citizen Access Setup pop-up window.*



8. Navigate to the Record Home page of a module, such as the **Building** module.

*Civic Platform displays the Building Record Home worksheet in the modular tab.*

The screenshot shows the 'Building CAP Home' window. At the top, there are tabs for 'Home' (selected) and 'Building'. Below the tabs is a search bar labeled 'Search for an Application'. A 'Permits' section is displayed, showing a table header with columns: Date, Permit Number, Permit Type, Agency, Description test, and Pro. The table body is currently empty, showing 'Showing 0-0 of 0'. Below the table is a 'Permits Search' section with instructions: 'Enter information below to search the City's permitting database. Permits can be searched for by entering information: Site Address, Contractor License Information, Permit Information. Use the drop-down menu to change the Search type.' It includes fields for 'Permit#:' (text input), 'Permit Type:' (dropdown), 'Project Name:' (text input), 'Start Date' (date picker set to 08/10/2008), 'End Date' (date picker set to 08/10/2009), 'License:' (dropdown), 'License Number:' (text input), 'First Name:', 'Last Name:', 'Name of Business:', 'Name of Business 2:', 'Country:' (dropdown), 'Street No.', 'Direction:', 'Street Name:', 'Street Type:', 'Unit Type:', 'Unit No.', 'Unit #(end):', 'Parcel No.', 'Lot:', 'City:', 'County:', 'State:', and 'Zip:'. A red box highlights a note: 'You must select an agency to search by this criteria.' Below this are two checkboxes: 'Search Additional Criteria' (unchecked) and 'Do not include Additional Criteria' (unchecked). A 'Search' button is located at the bottom left. The bottom of the window shows sections for 'Address', 'Trade Name', 'License', and 'Full Name' with their respective tables.

9. If you want to expose the ASI fields to only one record type:

- a. Click **Search Additional Criteria**.

*Civic Platform displays the Field Properties in the right panel.*

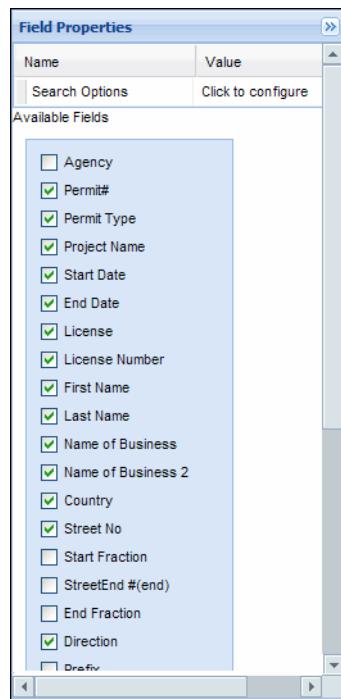
- b. In the Record Type Filter drop-down list, choose a record type to filter together with ASI fields. This limits the potential number of search results.

- c. Click the **Save** button.

10. If you share information between agencies and want to further restrict the number of record types available for the search:

- a. Click the General Search drop-down list.

*Civic Platform displays the Available Fields in the Field Properties right panel.*



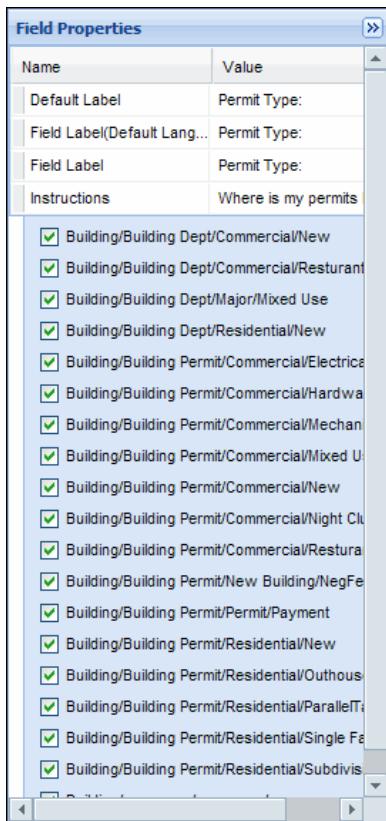
- b. Mark the check box next to Agency.

*Civic Platform displays an Agency drop-down list next to the Permit # text box in the General Search section of the Building Record Home worksheet.*

The screenshot shows the 'Building CAP Home' search interface. At the top right is a 'General Search' button. Below it is a 'Search my permits' checkbox. The search form includes fields for 'Agency' (a dropdown menu with 'select--' placeholder), 'Permit#', 'Permit Type' (another dropdown menu with 'select--' placeholder), and 'Project Name' (a text input field). There are date fields for 'Start Date' (08/10/2008) and 'End Date' (08/10/2009), with examples provided. Below these are fields for 'License' (dropdown menu with 'select--' placeholder) and 'License Number' (text input field). At the bottom are fields for 'First Name', 'Last Name', and 'Name of Business' (each with its own text input field), followed by a 'Name of Business 2' text input field.

- c. Select the desired agency from the Agency drop-down list, and click the **Save** button.

*Civic Platform displays the available record types in the Field Properties panel.*



- d. Mark the check boxes next to the record types you want to associate or dissociate with the agency search.
- e. Click the **Save** button.

**Note:** When you set this option, public user must select the agency from the Agency drop-down list to access the filtered list of available record types.

All of the ASI field(s) display in the Citizen Access public user General Search form.

## Customizing the Contact Search Form

Your agency can provide public users with the ability to search for records by contacts. Public users enter contact name search criteria. After choosing a contact name from the results list, Citizen Access displays the records associated with the contact name.

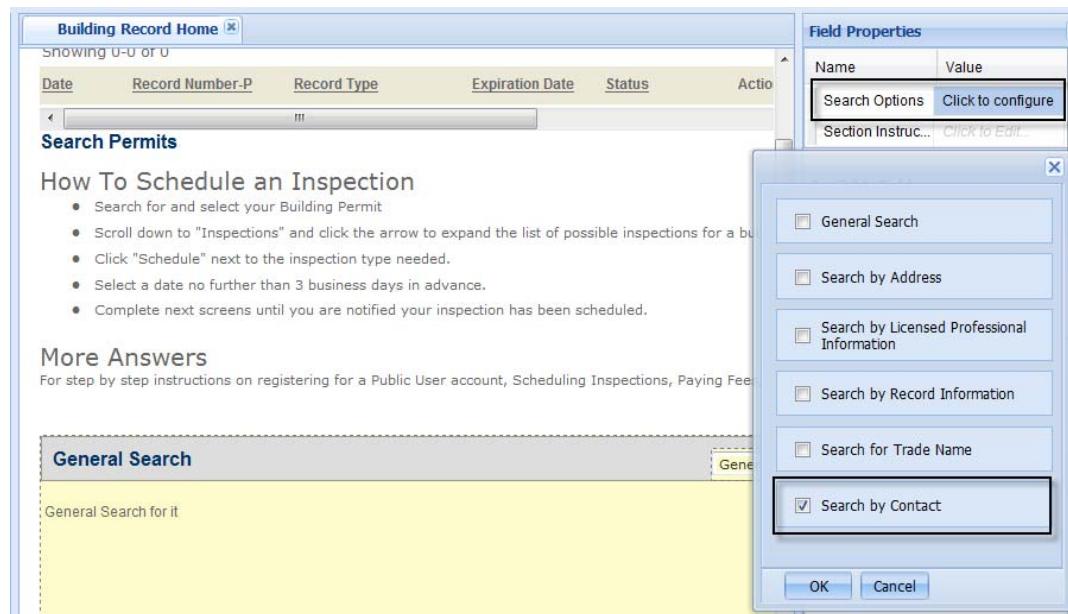
To enable contact search functionality, administrators must enable Records by Contacts in the Search drop-down list and customize the contact search form. For detailed instructions on how to customize web pages, see [Chapter 10: Working with Web Pages on page 160](#).

For information on how to leverage the SSN and FEIN standard contact fields during the registration process to eliminate duplicate contacts and to create associations and privacy to

public users, see [Setting SSN and FEIN Contact Field Validation on page 241](#) and [FEIN Mask Settings on page 63](#).

### To customize the contact search form

1. Navigate to the module that you want to enable contact search functionality.
2. Go to the General Search area on the Record Home page.
3. Enable **Search by Contact** as a search option in the Feature Properties area and click **OK**.

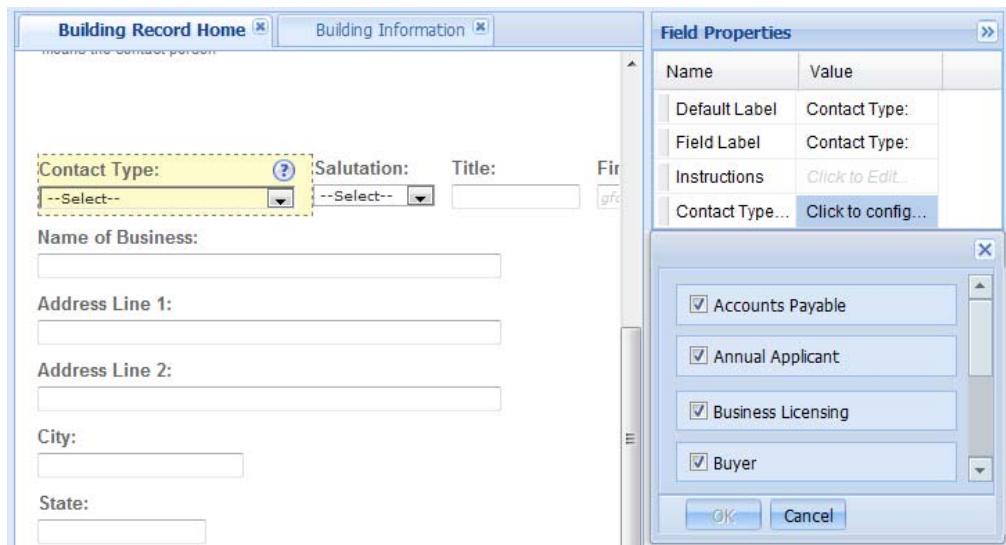


4. Click the **Search by Contact** option from the **General Search** drop-down list to access the contact search form.



5. Customize which fields are available on the contact search form, section headers to control display information. See [Chapter 10: Working with Web Pages on page 160](#).

6. Define the contact type options for the Contact Type filter. See [Assigning Contact Types to a Module on page 323](#) for detailed information.



7. Click **Save**.

## Exporting Search Results in CSV Format

Citizen Access allows the export of search results in CSV format, such as an excel file. This is particularly useful so public users can click a "Download results" link to save a list of records on their local computer.

The exported CSV file contains all the records that match the search criteria, not just the records in the results list available to view. For example, if Citizen Access returns 10 pages of results while there are 2,500 matching records, the CSV file has all the 2,500 matching records, not just the 10 pages of returned results.

Civic Platform follows a default naming convention when exporting information that is dependent on the date and source of the search. After the CSV file export finishes, public users can update the file name and location.

To enable this feature, administrators must mark the **Allow Export** check box on the **Global Settings** page.

### To allow export of search results

1. Navigate to the **Global Settings** page.
2. Go to the **Search Settings** section and mark the **Allow Public users to export Search Results (in CSV format)** check box to enable the export feature.

**Global Settings**

**Search Settings**

Global Search: Mark the check box to enable Global Search. User will be able to search records, licensed professionals and property information globally across all Modules.  
Allow Search Groups: Mark the check boxes to include which search groups can be searched by public user.  
People Search: Mark the check boxes to enable contact/licensed professional search during application. Click the Configure button to configure which types of contact/licensed professional are applicable for search during application.  
Enable Cross Module Search: Mark the check box to enable cross module search.  
Enable Address Range Search: Mark the check box to enable search by address range.  
Restrict Licensed Professional Results to Only Those Associated with the User: Mark the check box to only include licensed professionals associated with current public user in search results.  
Allow Public Users to Export Search Results (in the CSV Format): Mark the check box to allow public users to export the search result list in the CSV format.

**Global Search**

Enable Global Search  
Allow Search Groups:  Records    Licensed Professionals    Property Information

**People Search**

Enable Contact Search   [Configure](#)  
 Enable Licensed Professional Search   [Configure](#)

**Additional Settings**

Enable Cross Module Search  
 Enable Address Range Search  
 Restrict Licensed Professional Results to Only Those Associated with the User  
 Allow Public Users to Export Search Results (in the CSV Format)

**3. Click **Save**.**

*Citizen Access allows public users to export search results in CSV format.*

<b>Records</b>				
Showing 71-78 of 78   <a href="#">Download results</a>   <a href="#">Add to collection</a>   <a href="#">Copy Record</a>				
	Date	Record Number	Record Type	Status
<input type="checkbox"/>	02/28/2012	<a href="#">12CAP-00000204</a>	Building/Jessie/APO&People/Validate	
<input type="checkbox"/>	02/28/2012	<a href="#">12CAP-00000202</a>	Building/Jessie/APO&People/Multiple Contact	

## CHAPTER 14:

# CREATING RECORDS

You can configure Citizen Access, so your agency website provides public users with the service of creating records and paying their associated fees online. A record may include an application, case, license, permit, service request, and work order. After enabling modules for Citizen Access, you can define the types of records associated with the modules that you want to allow public users to create online in Citizen Access. You can also customize hyperlinks to provide quick access to the record creation page from other websites or other applications outside of Citizen Access. For information on how to customize hyperlinks to the record creation page, see [Configuring URLs and Deep Links to Citizen Access Pages on page 194](#).

Civic Platform provides a default, or standard method for creating records. Use this chapter with the [Configuring Records for Processing on page 209](#) from [Chapter 11: Implementation Planning on page 201](#) to assist you with completing the required configurations for successful implementation. The required configuration includes reviewing implementation considerations and reviewing dependent configurations throughout the other areas of software. You must complete required configuration for creating records online: creating record types, configuring application-specific information, defining workflow, associating scripts, configuring comments, conditions and contact types, attaching documents, setting up fees and online payment processing methodology, and preparing the site.

If your agency has special needs, you may choose an alternative method to create records. This decision is dependent on the available modules for your agency, whether your agency provides services for multiple agencies, or if your agency requires the use of an amendment record or a record with multiple child records. For configuration details to implement an alternative process for multiple agency implementation, to incorporate amendment functionality, or to implement parent-child record creation, refer to [Appendix C: Variations for Creating Records on page 527](#).

**Note:** *Record replaces CAP. The term Record defines a broad range of items or forms that users manage within Civic Platform, such as application, case, license, permit, service request, and work order.*

### Topics

- [Configuring Record Types in Civic Platform](#)
- [Preparing Web Pages to Create Records](#)
- [Configuring Application Specific Information](#)
- [Restricting Access to View Comments](#)
- [Assigning Conditions to Records](#)

- [Displaying Conditions](#)
- [Configuring Contacts](#)
- [Document Attachments](#)
- [Populating People Template Fields Using EMSE](#)
- [Enabling Auto-fill for City and State Fields](#)
- [Configuring Record Types in Classic Administration](#)

## Configuring Record Types in Civic Platform

You can add new record types to modules at any time. This section calls out the configurations within record type administration in Civic Platform that are specific to Citizen Access. This includes, how to define the record type alias, page flows, documents, and renewal information. This section also provides the complete instructions for the three major configuration areas in record type setup. For additional information about record type administration, see the *Accela Civic Platform Administrator Guide*.

When you create a new record type for Citizen Access, you must click the Create New Record button for a module and complete the record type form. This form displays in a pop-up window where you can enter basic record type information. You can access additional record type configurations after saving the basic information.

You can view the record details by clicking on the record type name from the record type list. Access the additional record type configurations by clicking a configuration tab from the summary navigation panel. The Settings portlet is used to configure additional record type features for the add-on products, like Citizen Access and Accela GIS (Silverlight version). The Other Associations portlet is used to configure other related items to the record type, such as fee schedule, expiration code, application-specific information groups, or workflow. You can save and resume as you go, but you must review all three areas of configuration to ensure the record type is of proper configuration.

After the record type configurations are complete in AA Admin, you can define additional functionality including conditions and standard comments in other areas of the application. Refer to “Conditions” and “Standard Comments” respectively, in the *Accela Civic Platform Administrator Guide*.

Note: Record type administration is still available in Civic Platform Classic Administration. For information about how to define record type configurations for Citizen Access in Civic Platform Classic Administration, see [Configuring Record Types in Classic Administration on page 347](#).

### Topics

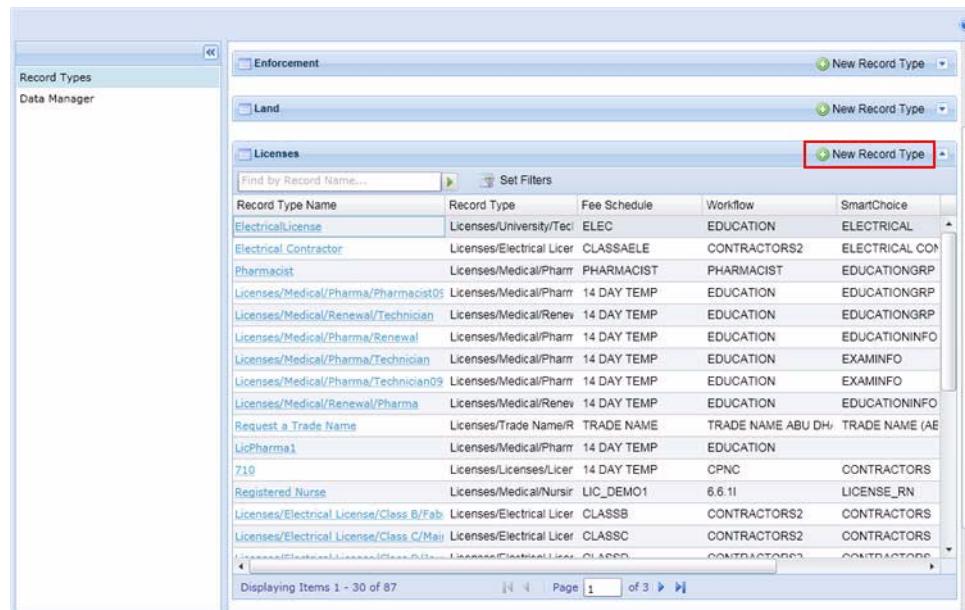
- [Basic Record Type Information](#)
- [Configuring Record Type Settings](#)
- [Configuring Other Associations](#)

## Basic Record Type Information

When you create a new record type, you must complete the required fields that display in the new record type pop-up window. This basic information allows the user to save enough critical data elements in Civic Platform so you can access the information about additional configuration such as defining Citizen Access Settings.

### To create a new Record type

1. Navigate to **Civic Platform > V360 Administration**.
2. In the **Setup** portlet, click the **Administration** item and choose **AA Admin** from the drop-down menu.  
*Civic Platform displays the Record Type administration.*
3. Locate the module that you want to add a record type, and click the New Record Type button in the module toolbar.



Civic Platform displays the New Record Type form in a pop-up window.

**New Record Type**

Complete the information below to create the record type. This information can be edited before the record type is published.

Record Type Name:	<input type="text"/>
Group*:	<input type="text"/>
Type*:	<input type="text"/>
Sub-Type*:	<input type="text"/>
Category*:	<input type="text"/>
<b>Additional Settings</b>	
A few short instructions here... Just adding some text here to make this into two lines of instructions.	
Fee Schedule:	<input type="text"/>
Workflow:	<input type="text"/>
SmartChoice Group:	<input type="text"/>
Record Key Mask:	<input type="text"/>
Partial ID Mask:	<input type="text"/>
Temporary ID Mask:	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Save and Create Another"/>	

4. Enter information in the fields as described in [List 6: New Record Type Form Fields on page 288](#).
  - At a minimum, you must complete the Record Type Name, Group, Type, Sub-Type, and Category. When those are complete, you can save and resume later.
5. Click **Save** or **Save and Create Another**.

**List 6: New Record Type Form Fields**

<b>Category</b>	Type the name of the new category.
<b>Fee Schedule</b>	Use the drop-down list to search and select a fee schedule to assign to the record type.
<b>Group</b>	Use the drop-down list to select a group for the record type.
<b>Partial ID Mask</b>	Use the drop-down list to search and select a Partial ID Mask for identification of records that are only partially complete at intake, records representing an estimate, or records that are saved and resumed for later in Citizen Access.
<b>Record Key Mask</b>	Use the drop-down list to search and select a Record Key mask, which identifies a record of this type in Civic Platform. You can also just use the default value: \$\$yy\$\$CAP-00000-\$\$SEQ05\$\$ by choosing Default from the list.
<b>Record Type Name</b>	Enter an alias name for the record type to display in the record list portlet. This name replaces the four level name for the record type.
<b>SmartChoice Group</b>	Use the drop-down list to search and select a SmartChoice group. SmartChoice functionality is an important part as it indicates what intake information you want to gather for this record type.
<b>Sub-Type</b>	<p>Do one of the following: choose an existing or create a new sub-type.</p> <p>To create a new sub-type, enter a name in the field for it.</p> <p>To choose an existing sub-type, use the drop-down list to search and select the sub-type you want to use.</p>
<b>Temporary ID Mask</b>	Use the drop-down list to search and select the mask used for the Partial ID Mask for this record type.
<b>Type</b>	<p>Do one of the following: choose an existing or create a new type.</p> <p>To create a new type, enter a name in the field for it.</p> <p>To choose an existing type, use the drop-down list to search and select the type you want to use.</p>
<b>Workflow</b>	Use the drop-down list to search and select a workflow process to assign to the record type.

## Configuring Record Type Settings

After defining the basic configuration for a record type, you can complete the record type settings. These configurations include: settings for Citizen Access, Audit Frequency, and Accela GIS (Silverlight version) Settings. For an brief overview of the Record Type Settings page, see “Configuring Record Type Settings” in *the Accela Civic Platform Administrator Guide*.

### To configure the Settings portlet

1. Navigate to the Record Type administration portlet in Civic Platform Administration.

2. Expand a module to search and select the record type you want to work with. For instructions on how to search for a record type, see “Searching for Record Types” in the *Accela Civic Platform Administrator Guide*.

Civic Platform displays the Record Type Summary page.

The screenshot shows the 'Record Type Summary' page. At the top, there are navigation links: 'Back to List', 'Viewing Record Type 0 of 0', 'Previous Item', and 'Next Item'. On the left, a 'Navigation Panel' contains a tree view with nodes like 'for Accela Automation' and 'for Accela Citizen Access'. Below the tree is a 'Last Updated' section. A vertical bar labeled 'Summary' is on the right. The main content area is titled 'Summary' and displays the following information:

Record Type Name:	Last Updated By:
Current Status:	Updated on:
Group:	Number of Records created:
Type:	Last Record created by:
Sub-Type:	
Category:	

3. Click the **Setting** tab from the summary panel.

*Civic Platform displays the Settings portlet.*

<b>Settings</b>	
<a href="#">Settings for Accela Citizen Access</a>	<a href="#">Audit Frequency</a>   <a href="#">GIS Settings</a>
Record Type Name:	<input type="text" value="Enter Record Type Name"/> <input type="button" value="Icon:"/> <input type="button" value="Browse..."/> <input type="text" value="Enter IVR Number"/>
Status:	<input checked="" type="radio"/> Enable <input type="radio"/> Disable <input type="checkbox"/> Searchable
Duration:	<input type="text" value="Enter Duration"/> (days)
Unit of Production:	<input type="button" value="Select an Unit of Production"/>
Estimated Cost Per Production Unit:	<input type="text" value="Enter Unit Value"/>
Enforcement Type:	<input type="button" value="Select an Enforcement Type"/>
E-mail for Hearing Notification:	<input type="text" value="Enter E-mail"/>
<b>Settings for Accela Citizen Access</b>	
<b>Instructions :</b> The settings below enable this record type to be selected and/or renewable in Accela Citizen Access. Mark the Enable Issuance check box to automatically issue or renew the permit or license when the application is submitted in Accela Citizen Access.	
Would you like this permit to be available through Accela Citizen Access? <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="checkbox"/> Enable for Application <input type="checkbox"/> Enable Issuance Page Flow Code : <input type="button" value="Select a Page Flow Code"/> Document Code : <input type="button" value="Select a Document Code"/>	
Set the criteria for selecting fees between the Contractor Value and the Valuation Calculator: <input checked="" type="radio"/> Use higher value <input type="radio"/> Use lower value <input checked="" type="checkbox"/> Enable Renewal <input checked="" type="checkbox"/> Enable Issuance Renewal Record Type*: <input type="button" value="Select a Renewal Record Type"/> <input type="checkbox"/> Enable Fee Estimation <input type="checkbox"/> Enable Associated Forms <input type="checkbox"/> Enable Partial Submission <input type="checkbox"/> Searchable in Accela Citizen Access Allow anonymous user to create: <input type="button" value=""/>	
<b>Audit Frequency</b>	
<b>Instructions :</b> The audit frequency can be defined at each level of the record type for random audit generation. For example, all record types with Group = 'Building' are available for audit every 6 months.	
Record Type Level	Audit Frequency
<input type="button" value="Select a GIS Service"/> <input type="button" value="Select Edit Layer"/>	

4. Complete the Settings section and the Settings for Citizen Access section. For additional information, see [Table 12: Record Type Settings Field Descriptions on page 291](#).
  - If necessary, complete the Audit Frequency section and Accela GIS (Silverlight version) Settings fields section.
5. Click **Save**.

**Table 12: Record Type Settings Field Descriptions**

Section on Page	Field	Field Description
Settings for any module	Record Type Name	Enter an alias name for the record type to display in the record list portlet. This name replaces the four level name for the record type.
Settings for any module	Duration	Enter the number of days you estimate the record should take to complete. For more information, see “Setting Up an Estimated Application Due Date” in the <i>Accela Civic Platform Administrator Guide</i> .
Settings for any module	Icon	Click the Browse button to search and select the image you want associated with the record type. For more information, see “Configuring a Display Image Attachment” in the <i>Accela Civic Platform Administrator Guide</i> .
Settings for any module	IVR Number	Enter the associated IVR (Interactive Voice Response) number for the record type. For more information about the IVR Number, refer to the <i>Accela IVR Administrator Guide</i> , or the <i>Accela IVR Installation Guide</i> .
Settings for any module	Status	Select <b>Enable</b> or <b>Disable</b> .  You can choose to Disable a record type to prevent users from creating this type of record. The Disable option does not remove the record type.  All application types with the Enable status are searchable. If you disable an application type, you can mark the <b>Searchable</b> check box below the status options, to allow users to search records with the disabled yet searchable record type.
Settings for Asset Module	Default Production Unit	Enter a fixed production quantity for a Work Order.
Settings for Asset Module	Estimated Cost Per Production Unit	Enter a value to be used to generate the estimated cost for each work order. The functionality is particularly useful when Accela Asset Management users record the estimated cost per production unit.

**Table 12: Record Type Settings Field Descriptions (Continued)**

<b>Section on Page</b>	<b>Field</b>	<b>Field Description</b>
Settings for Asset Module	Unit of Production	Use the drop-down list to select the unit of measure for Production Units for the record type for Accela Asset Management. For example, Each, Feet, Acres, or Miles.
Settings for Asset Module	Value Required to Close	Mark the check box to indicate the Production Quantity field is required before closing a work order in Accela Asset Management.
Settings for Enforcement Module	Email for Hearing Notification	Enter the e-mail address used to send e-mail notifications for hearings.
Settings for Enforcement Module	Enforcement Type	Enter the enforcement type in this field. For example, Abatement.
Settings for Citizen Access	Enable Associated Forms	Mark this check box to display the Associated Forms step to the record creation process. Use the Associated Forms step to display and manage child records for the parent record during the parent record creation. For more information about creating parent and child records, see <a href="#">Creating a Parent-Child Record on page 527</a> . Marking this check box also activates the Enable Partial Submission check box. <b>Enable Partial Submission:</b> Mark this check box to enable public users to continue the application intake process without completing all available associated forms.
Settings for Citizen Access	Enable Application	This field shows only if the FID of 0075 is enabled. Mark the <b>Enable Application</b> check box to make the Record type available in Citizen Access. Only if the Enable Application check box is marked, is the Record Type is available in Citizen Access. The Record Type cannot be automatically issued through Citizen Access, it needs agency's approval. This check box also flags Civic Platform to display the Record Type Alias in Citizen Access. <b>Also Enable Issuance:</b> Mark this check box if you want to automatically approve and issue the record type through Citizen Access when fees are paid in full.
Settings for Citizen Access	Enable Fee Estimation	This field shows only if the FID of 0075 is enabled. Mark this check box if you want to allow users to create a partial application that includes a calculation of estimated fees. This fee estimation is dependent on the Fee Schedule.

**Table 12: Record Type Settings Field Descriptions (Continued)**

<b>Section on Page</b>	<b>Field</b>	<b>Field Description</b>
Settings for Citizen Access	Enable Renewal	<p>Mark the <b>Enable Renewal</b> check box if you want to enable the renewal of licenses in Citizen Access for this record type. Mark this check box to activate the <b>Enable Issuance</b> check box for this renewal, and the <b>Renewal Record Type</b> drop-down list.</p> <p>Administrators must define a renewal record type relating to this renewal process.</p> <p><b>Enable Issuance:</b> Mark the Enable Issuance check box for renewals if you want to provide the service “Issuance Online”. It also provides the ability to have the License or Permits status change back to “Active” when a public user completes the Renewal Application.</p> <p>Choose a <b>Renewal Record Type</b> from the drop-down list to designate the renewal Record Type for the expired Record. For example, choose a Renewal Plumber Permit for the expired plumbing permit.</p>
Settings for Citizen Access	Document Code	<p>Indicate the document code set for the types of documents public users can upload and attach to record types in Citizen Access.</p> <p>This field is visible only if administrators set the Function Identification (FID) numbers 0108 Admin Document Type and 0065 Admin Application Types to Full Access.</p>
Settings for Citizen Access	Page Flow Code	<p>Use this drop-down list to associate a Page Flow code to this record type. The page flow code you choose is reflected within ACA Admin. You can create and assign the default setting for this field in ACA Admin page flow configuration.</p> <p>For more information about page flows, see <a href="#">Chapter 9:Page Flow Configuration</a>. For specifics about page flow code, see <a href="#">Configuring Record Type Settings on page 288</a>.</p>
Settings for Citizen Access	Set the criteria for selecting fees between the Contractor Value and the Valuation Calculator.	To set the fee valuation associated with the record, you can choose to use the higher value or the lower value that is calculated between the Contractor Value and the Valuation Calculator.
Settings for Citizen Access	Searchable in Citizen Access	Mark the check box to indicate the records of the selected record type can be searched in Citizen Access.

**Table 12: Record Type Settings Field Descriptions (Continued)**

Section on Page	Field	Field Description
Settings for Citizen Access	Allow anonymous users to create:	This option and the Force Registration/Login setting jointly determine whether anonymous users can create records of specific record types in Citizen Access, or through deep links. For more information, see <a href="#">Table 15: Settings on Creating Records by Anonymous Users</a> .
Settings for Citizen Access	Would you like this permit to be available through Citizen Access?	This field shows only if FID of 0075 is disabled. You can either select "Yes" to make the record type available in Citizen Access, or select "No" to prevent the record type being available from Citizen Access.
Audit Frequency	Audit Frequency	<p>Enter the number of months in the Audit Frequency column to designate the interval between audits for the Record Type. You can enter a number under any of the Record Type Levels. For example, enter a "3" next to the Building Permit Record Type Level to prevent Building Permit Records from auditing within a three month period.</p> <p>When you edit any level of a Record Type, Civic Platform automatically syncs the audit frequency for all related Record Types. For example, if you modify the audit frequency for Building to 18 months for Building/Commercial/Addition/Apt +5, the audit frequency for Building/Commercial/Addition/Amusement also changes to 18 months.</p>

## Configuring Other Associations

After defining the basic configuration and the settings for a record type, you can complete the other associations of the record type. These configurations include: Address Type Group, Application Specific Info Group, Associated Record Types, Document Code, Expiration Code, Fee Schedule, Inspection Group, Sequences and Masks, SmartChoice Groups, Status Group, and Workflow. Agency administrators may have defined some of these configurations in the basic record type setup, but you can modify the configuration if you have permissions to do so. Also, you can use this record type other associations portlet to create new codes or groups and assign them to the record type if you have permissions to do so. For an overview of the format for the Other Associations page, see the "Record Types" chapter in the *Accela Civic Platform Administrator Guide*.

### To configure the other associations portlet

1. Navigate to the Record Type administration portlet.
2. Expand a module to search and select the record type you want to configure.

Civic Platform displays the Record Type Summary page.

3. Click the **Other Associations** tab from the summary panel.

*Civic Platform displays the Other Associations portlet.*

The screenshot shows the 'Other Associations' portlet with the following sections:

- Sequences and Masks**: Includes fields for Record Key Mask\*, ID Mask, Partial ID Mask\*, and Temporary ID Mask\*. Each field has a dropdown menu showing 'Default' and a link to 'View mask definition'.
- Document Code**: Includes fields for Default Document Code (dropdown menu with 'Select a Document Code' and 'Create new Document Code' buttons) and Default Document Type (dropdown menu).
- Expiration Code**: Includes a dropdown menu for NONE, a 'ViewEdit' button, and a 'Create new Expiration Code' button.
- Inspection Group**: Includes a dropdown menu for 'Select an existing Inspection Gr', a 'ViewEdit' button, and a 'Create new Inspection Group' button.

4. Complete the Other Association fields as described in [Table 13: Record Type Other Associations Fields on page 296](#).

- If necessary, complete the Sequences and Masks section. This section has required fields.
- If necessary, complete the Document Code section.
- If necessary, complete the Expiration Code section.
- If necessary, complete the Inspection Group section.
- If necessary, complete the Address Type Group section.
- If necessary, complete the Fee Schedule section. This section has a required field.
- If necessary, complete the Workflow section. This section has a required field.
- If necessary, complete the SmartChoice Group section. This section has a required field.
- If necessary, complete the Application Specific Info Group section.
- If necessary, complete the Associated Record Types section.

5. Click **Save**.

**Table 13: Record Type Other Associations Fields**

<b>Section on Page</b>	<b>Field</b>	<b>Field Descriptions</b>
Sequences and Masks	ID Mask	<p>Select the mask for the application type. Users can click the ID Mask Definition link to read the pattern and definition of ID masks. Within the pop-up window you can also click the Guide button to review the recommended mask patterns and the examples.</p> <p>For instructions on creating a mask, see "Editing a Mask" in the <i>Accela Civic Platform Administrator Guide</i>. For more information on managing sequences and using the Sequence Generator tool, see the "Sequence Generator" chapter in the <i>Accela Civic Platform Administrator Guide</i>.</p>
Sequences and Masks	Invoice Number Scheme	<p>From the drop-down list, choose the invoice number format for the record type.</p> <p>You format an invoice number scheme by creating a mask. For an example on formatting a receipt number scheme or mask, see "Setting Up a Sequence and Mask Definition" in the "Autonumbers" chapter in <i>Accela Civic Platform Administrator Guide</i>.</p> <p>Users can click the Select a Invoice Number Scheme link to read the pattern and definition of the invoice in this drop-down list. For example, administrators may want to number invoices for the code enforcement department differently from invoices for the permit department.</p>
Sequences and Masks	Partial ID Mask	<p>Use the drop-down list to search and select a Partial ID Mask for identification of those records that are only partially complete at intake, records that represent an estimate, or records that were saved and resumed for later in Citizen Access. Partial ID Mask is a required field.</p>
Sequences and Masks	Receipt Number Scheme	<p>From the drop-down list, choose the receipt number format for the record type.</p> <p>You format a receipt number scheme by creating a mask. For instructions on formatting a receipt number scheme, see "Editing a Mask" in the <i>Accela Civic Platform Administrator Guide</i>.</p> <p>Users can click the Receipt Number Definition link to read the pattern and definition of the receipt in this drop-down list. As an example, system administrators may want to group receipts for the building department separately from receipts for the code enforcement department.</p>
Sequences and Masks	Record Key Mask	<p>Use the drop-down list to search and select a Record Key mask, which identifies a record of this type in Civic Platform. You can also just use the default value: \$\$y\$\$CAP-00000-\$\$SEQ05\$\$ by choosing Default from the list. Record Key Mask is a required field.</p>

**Table 13: Record Type Other Associations Fields (Continued)**

<b>Section on Page</b>	<b>Field</b>	<b>Field Descriptions</b>
Sequences and Masks	Temporary ID Mask	Use the drop-down list to search and select the mask used for the Temporary ID Mask for this record type. Temporary ID Mask is a required field.
Document Code	Default Document Code Default Document Type	Use the drop-down menu to select an existing document code. You can view or edit this code by clicking the View/Edit link. If you want to create a new Document Code, click the Create new Document Code link.  For detailed instructions on how to create a document code, see "Configuring Documents for Attachments" in the <i>Accela Civic Platform Administrator Guide</i> . Use the Default Document Type to provide a label for type of document, such as a graphic image or photo, a drawing, or a Word document.
Expiration Code	Expiration Code	Use the drop-down menu to select an existing expiration code. You can view or edit this code by clicking the View/Edit link. If you want to create a new Expiration Code, click the Create new Expiration Code link.  For instructions on creating a new expiration code, see the list "Expiration Code Fields" in the <i>Accela Civic Platform Administrator Guide</i> .
Inspection Group	Inspection Group	Use the drop-down menu to select an existing Inspection code. You can view or edit this code by clicking the View/Edit link. If you want to create a new Inspection Group, click the Create new Inspection Group button.  For instructions on creating a new inspection code, see "Managing Inspection Groups" in the <i>Accela Civic Platform Administrator Guide</i> .
Address Type Group	Address Type Group	Use the drop-down menu to select an Address Type Group you want to assign to the record type.  For more information, see "Managing Address Type Groups" in the <i>Accela Civic Platform Administrator Guide</i> .
Status Group	Application Status Group Code	Use the drop-down menu to select an existing Application Status Group code. You can view or edit this code by clicking the View/Edit link. If you want to create a new Application Status Group, click the Create new Status Group button.  For more information, see "Working with Application Status Groups" in the <i>Accela Civic Platform Administrator Guide</i> .
Status Group	Default Record Status	Use the drop-down menu to select the default record status you want to assign to the record type.  For more information, see "Changing the Name or Default Status of a General Profile" in the <i>Accela Civic Platform Administrator Guide</i> .

**Table 13: Record Type Other Associations Fields (Continued)**

<b>Section on Page</b>	<b>Field</b>	<b>Field Descriptions</b>
Fee Schedule	Fee Schedule	<p>Use the drop-down menu to select an existing Fee Schedule. You can view or edit the Fee Schedule code by clicking the View/Edit link. If you want to create a new Fee Schedule, click the Create new Fee Schedule button. Fee Schedule is a required field.</p> <p>For more information about fee schedules, see “Managing Fee Schedules” in the “Fee Setup” chapter of the <i>Accela Civic Platform Administrator Guide</i>.</p>
Workflow	Workflow	<p>Use the drop-down menu to select an existing Workflow. You can view or edit the Workflow code by clicking the View/Edit link. If you want to create a new Workflow, click the Create new Workflow button. Workflow is a required field.</p> <p>For more information about workflow, see “Managing Workflow Processes” in the <i>Accela Civic Platform Administrator Guide</i>.</p>
SmartChoice Group	SmartChoice Group	<p>Use the drop-down menu to select an existing SmartChoice group. You can view or edit the SmartChoice Group code by clicking the View/Edit link. If you want to create a new SmartChoice Group, click the Create new SmartChoice Group button. SmartChoice Group is a required field.</p> <p>For more information about SmartChoice groups, see “Working with SmartChoice Groups” in the <i>Accela Civic Platform Administrator Guide</i>.</p>
Application Specific Info Group	Application Specific Info Group	<p>Use the drop-down menu to select an existing Application Specific Info Group. You can view or edit the Application Specific Info Group code by clicking the View/Edit link. If you want to create a new Application Specific Info Group, click the Create new Application Specific Info button.</p> <p>For more information about Application Specific Info Groups, see “Application-Specific Information” in the <i>Accela Civic Platform Administrator Guide</i>.</p>
Associated Record Types	No Status Status Group	<p>Click the No Status link or click a status group link, you see a popup to associate a record type.</p> <p>For more information about Associated Record Types, see “Associating Record Types” in the <i>Accela Civic Platform Administrator Guide</i>.</p> <p>Prior to associating record types, you must mark the Enable Cart check box and set the Payment Transaction Settings to “Transaction per Cart” in Cart Settings. For more information about cart settings, see “Cart Settings” topic in the Global Settings Configuration Page chapter.</p>

# Preparing Web Pages to Create Records

Prepare your web pages so public users can access record type creation. Display record creation links, customize the text of applicable web pages to support the application process for the module. If you want to display customized field labels for ASI fields, see [Customizing ASI Field Label Text on page 305](#). Finally, you must ensure you have defined and assigned the page flow. The order information shows to public users on web pages during an application-intake process is dependent on page flow configuration.

## Topics

- [Displaying Links to Creating Records on Welcome Page](#)
- [Customizing Web Pages](#)
- [Defining the Page Flow for Record Types](#)

## Displaying Links to Creating Records on Welcome Page

You can configure the Welcome pages to display links associated with the record creation process on the Feature Settings page for each module. Expand a module and mark the associated Create an Application check box. If your agency offers fee estimation for an application, mark the Obtain a Fee estimate check box, also. For more information about the Feature Settings page, see [Feature Setting Configurations on page 82](#).

### To display record links for record processing

1. Navigate to the Feature Settings page from the navigation panel.  
*Citizen Access displays a column of features and modules.*
2. Expand a module and display the create record link on the Welcome page by marking the Create an Application check box.
  - If you want to require a public user to register or login before they can create an application, expand the tree and mark the Force Login check box for creating an application.
3. If your agency implements fee estimation, mark the Obtain a Fee Estimate check box to display the link on the Welcome page.
4. Click **Save**.

## Customizing Web Pages

You must customize web pages to create the display your agency wants to provide to public users during an application-intake process for a module. You can modify the text content, display or hide sections on a page, display or hide fields, change the font, and change the font size and color. For information about how to customize a web page, see [Chapter 10: Working with Web Pages on page 160](#).

For each module, you must configure the pages related to the application-intake process. Also you must define the Record Home page and Record Detail page.

## Topics

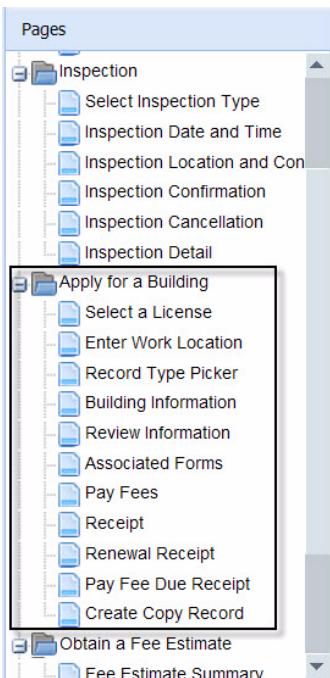
- [Application-Intake Pages](#)
- [Record Home Page for a Module](#)
- [Record Detail Pages for a Module](#)

## Application-Intake Pages

The application-intake process displays a sequence of pages to collect application information from a public user. Each module requires you to define the content on the web pages so users can follow the instructions and generate a record online. You must define all the pages in the module page folder designated to create a record. For example, the Building Module has a folder named Apply for a Building and the Service Request has a folder named Folder Apply for a Service Request.

### To customize the application-intake pages

1. Choose a module from the navigation panel and go to the Pages area.
2. Expand the folder which contains the application-intake pages.



3. Customize the pages listed below: for instructions, see [Chapter 10: Working with Web Pages on page 160](#).
  - Select a License
  - Enter a Work Location
  - Record Type Picker
  - Module Information. For example, Building Information

- Review information
- Associated Forms. The forms display when administrators set the record type to enable associated forms.
- Pay Fees
- Receipt
- Renewal Receipt

**4. Click **Save**.**

## Record Home Page for a Module

When users select a module tab in the website, the record home page displays. There are usually two sections in a record home page: My Permit List and General Search. See [Figure 88: Record Home Page for a Module](#). You can define the display of the record home page for each module.

**Figure 88: Record Home Page for a Module**

The screenshot shows the 'Building Record Home' page. At the top, there's a navigation bar with links for Announcements, Register for an Account, Reports, and Login. Below the navigation is a search bar labeled 'Search... Must be logged in'. The main content area has tabs for Home, Building, Business, Enforcement, Roads, Trees, Water, AFS, and more. Under the Building tab, there's a sub-menu with options like Apply for a Building Permit, Obtain a Fee Estimate, Search for a Building Permit, and Schedule an Inspection. A 'Records' section displays a table with columns for Date, Record Number, Record Type, Status, and Action. A 'Show on Map' button is also present. Below this is a 'Search Permits' section with a 'General Search' dropdown. The search form includes fields for Case Number, Permit Type (dropdown), Start Date (calendar), End Date (calendar), License Type (dropdown), State License Number, Parcel No., Street No., Street Name, City, Zip, and a checkbox for 'Search my records only'. There are also buttons for 'Search' and 'Clear'. At the bottom, there are sections for 'Address' (listing Trade Number, Type, English Trade Name, Arabic Trade Name, Expiration Date, and Status) and 'Business License' (listing License Number, License Type, Business Name, License Issue Date, and License). On the right side, there's a 'Section Properties' sidebar with a 'Available Fields' list containing checkboxes for Date, Record Number, Record Type, Agency, Module, Description, Project Name, Address, English Trade Name, Arabic Trade Name, Expiration Date, Related Records, Created By, Status, Action, and Record Class. The 'Rows Per Page' setting is set to 20.

### To customize the record home page

1. Navigate to the desired module.
2. Select the **Record Home** page from the Module Home folder in the Pages area.

**3.** Customize the **My Permit List** section. Do one or more of the following:

- Configure which column headers you want to display in the list table, and configure the column positioning and column width. For instructions, see [Chapter 10: Working with Web Pages on page 160](#).
- If necessary, enable the quickquery drop-down list to display for the section.

By default, the My Permit List section lists all the records that the current user created in the module, and the records associated with the contacts, licensed professionals or owners that the current user added to his/her account. With the quickquery dropdown list, public users can select a quickquery to apply to the record list.

The screenshot shows a list of trade names and trade licenses. At the top, there are navigation tabs: Home, Licenses, Services, Building, and Financial. Below the tabs, there are links: Reserve a Trade Name, Apply for a Trade License, and View License Requirements. The main area is titled "Trade Names & Trade Licenses" and displays 1-10 of 34 results. The columns are Number, Trade Name (En), Trade Name (Ar), Expiration Date, and Status. A dropdown menu is open over the "Trade Name" column header, listing options: --Select--, Amendments, Fines, License, and TradeName. The list contains entries like CR-1294508, CR-1293325, CR-1293326, CR-1293327, CR-1293329, CR-1293716, CR-1284402, CR-1283981, CR-1294002, and CR-1294003. Each entry has a checkbox next to it and a detailed description below it. At the bottom, there are navigation links: < Prev, 1, 2, 3, 4, Next >.

You must configure two settings if you want to enable the quickquery dropdown list in the section.

- The Standard Choice Value DISPLAY\_QUICK\_QUERY in the Standard Choice ACA\_CONFIGS. You must set the value to Yes.
- The quickquery settings for the ACA My Permit List portlet in the Global QuickQueries administration portlet. You must assign a quickquery to a module for the quickquery option to display in the record home page of the module. If a module is not assigned with any quickquery for the ACA My Permit List portlet, the My Permit List section of the module's record home page still hides the quickquery drop-down list.

For more information about creating a global quickquery, see “Creating a Global QuickQuery” in the “QuickQueries” chapter of the *Accela Civic Platform Administrator Guide*.

**4.** Customize the **General Search** section. For instructions, see [Chapter 13: Configuring Record Inquiry on page 243](#).

## Record Detail Pages for a Module

You can define the display of the record detail page for each module. For example, you can click a section title to change the heading text. You can also click a list column to edit its heading and width. See [Figure 89: Module Record Detail Page on page 303](#).

If your agency stores some record information in a third-party web application and defines a URL to the record information on a record, public users can click the **Click here for more**

**information** deep link, on the Record Detail page, to view the record information. You can customize the label of the link on the Record Detail page through Citizen Access Setup.

**Note:** Your agency defines the URL to record information at the record level in Civic Platform. If your agency does not define the URL for a record, public users cannot see the Click here for more information link on the Record Detail page. For more information about how to define the URL in Civic Platform, see “Application Record Fields” in the Records chapter of the Accela Civic Platform User Guide.

Figure 89: Module Record Detail Page

Field Properties	
Name	Value
Default Label	Click here for more in...
Button Label	Click here for more in...

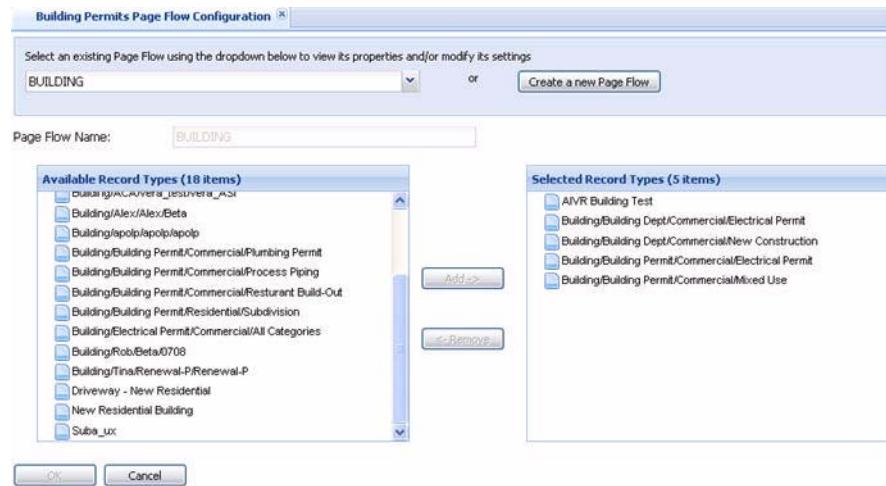
## Defining the Page Flow for Record Types

You must define page flows for applications enabled for Citizen Access. The page flow provides the map that controls the user experience. It displays pages in sequential steps to gather information during the application process. See [Figure 64: Page Flow Configurations on page 133](#). You can define the page flow code in the Page Flow Configuration pages for a module in Citizen Access Setup.

You can assign a record type to a page flow code in Page Flow Configuration. See [Figure 90: Assign Record Types to a Page Flow](#). For instructions, see [Associating Record Types With a Page Flow](#).

You can also assign the page flow code in record type administration. See [Configuring Record Type Settings on page 288](#). For more information about page flows, see [Chapter 9: Page Flow Configuration](#).

**Figure 90: Assign Record Types to a Page Flow**



## Configuring Application Specific Information

You can create application-specific information to help you gather critical information from public users. You can customize ASI field labels just for Citizen Access. You can also create drill-down functionality to limit the public user choices based on previous decisions in the application. Use the expression builder to assist you with auto-populating information in application-intake forms.

### Topics

- [Defining ASI Fields and Tables](#)
- [Customizing ASI Field Label Text](#)
- [Configuring ASI Table Drill-Downs](#)
- [Configuring ASI Field Drill-Downs](#)
- [Configuring Expressions for ASI or ASI Table Sections](#)

## Defining ASI Fields and Tables

Citizen Access applies ASI modifications to new and existing applications regardless of the application status according to the related configurations as defined in Civic Platform. For information on how to ensure this feature is available to application types and partially completed application types submitted in Citizen Access, refer to the "Working with ASI Group Fields" chapter in the *Accela Civic Platform Administrator Guide*.

## Customizing ASI Field Label Text

You can customize ASI field label text which displays to public users on the application intake form, Record Home page, Review Page, and Record Detail page in Citizen Access. The ability to change ASI label text is particularly useful when you need to ask questions with the intent to collect specific answers from a public user during the application intake process. For example, you could change an ASI field label from "Memo" to "Please provide additional information here:". Or you could change "Criminal History" to "Have you or any member of your immediate family, including spouse, children, grandchildren, parents, or siblings been convicted of a crime?". You can also incorporate the ASI Field drill-down feature to control the available responses to questions based on a previous ASI field response. For information on how to apply ASI field drill-downs, see [Configuring ASI Field Drill-Downs on page 309](#).

To change an ASI field label, you must enter the text in the Alternative ACA Label field located in ASI field configuration of Civic Platform. If the text for a label extends the maximum length allowed, then you can increase the numeric Value Desc for Standard Choices Value ASI\_LABEL\_WIDTH in Standard Choice ACA\_CONFIGS. The numeric quantity represents the number of characters displayed per line on an ASI field label.

### To customize ASI field label text

1. Navigate to Civic PlatformCivic PlatformCivic Platform.
2. Configure the optional related Standard Choice ACA\_CONFIGS with Standard Choice Value ASI\_LABEL\_WIDTH if you want to adjust the ASI text label width to accommodate longer text labels. The numeric Value Desc represents the number of characters displayed per line on an ASI field label. Maximum numeric value is 900.

<b>Standard Choice</b>	ACA_CONFIGS
<b>Standard Choices Value</b>	ASI_LABEL_WIDTH
<b>Value Desc.</b>	40

For information on creating the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

3. Choose **Application > Application Specific Info**.  
*Civic Platform displays the Application Specific Info - Search page.*
4. Search and select an existing or add a new Application Specific Group containing the ASI Subgroup and field label you want to modify. Then, select the subgroup to view the associated ASI Fields you want to work with.
5. Do one of the following:
  - Click **Add** and fill out the form to create a new ASI Field.

- 1) Enter a new ASI field label to display in Citizen Access in the text box of **Alternative ACA Label**.

Application Specific Info Field - Add

Apply changes to this subgroup only  Apply changes to all subgroups

Application Spec Info Group Code: ASI

Field Label*	
Field Type*	Text
Display Order*	
Default Value:	
Unit:	<input type="button" value="New Unit"/>
Fee Indicator:	
Required Flag:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Req for Fee Calc:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Supervisor Edit Only:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Searchable Flag:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Max Len:	
Display Len:	
Justification:	<input type="button" value="New Justification"/>
ACA Displayable:	<input type="radio"/> Yes <input type="radio"/> Hidden <input checked="" type="radio"/> No
ACA Searchable:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Display new ASI on existing CAPS:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Status:	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Alternative ACA Label:	<input style="border: 2px solid red; width: 100%; height: 100%;" type="text"/>

**Submit** **Cancel**

- 2) Click **Submit**.

- Choose an existing ASI Field and click the **Add Alternative ACA Label** link for an ASI on the far right side of the page.

In the pop-up window, enter the new label in the **Alternative ACA Label** text box and click **Submit**.

*Civic Platform displays the Alternative ACA Label as a link in the ASI field list.*

Application Specific Info

Use this form to edit Application Specific Info.

Application Spec Info Group Code: ASI  
 Application Spec Info Subgroup:  
 Application Spec Info Subgroup (Default): ASI\_SUB  
 Default APO GIS Layer:  
 Location Query:  Yes  No  
 Apply changes to this subgroup only:   
 Apply changes to all subgroups:

Field Label (Default)	Field Label	Type	Display Order	Fee Indicator	Unit	Default Value	Required	Req for Fee Calc	Supervisor Edit Only	Searchable Max Len	Display Len	ACA Displayable	ACA Searchable	Justification	Status	Alternative ACA Label
CD4649		Text	2				No	No	No	10		Yes	Yes		<input checked="" type="radio"/> Enabled	<a href="#">Add Alternative ACA Label</a>
Question	Question	Text	3				No	No	No	10		No	No		<input checked="" type="radio"/> Enabled	<a href="#">What's your name?</a>
CIS		Text	0				No	No	No	10		Yes	Yes		<input checked="" type="radio"/> Enabled	<a href="#">Add Alternative ACA Label</a>
CACC		Text	1				No	No	No	10		Yes	Yes		<input checked="" type="radio"/> Enabled	<a href="#">Add Alternative ACA Label</a>

**6. Click **Update**.**

*Citizen Access displays the new ASI field label to public users.*

The screenshot shows a search interface for permit information. At the top, there are fields for 'Agency' (dropdown), 'Record Number' (text input), 'Record Type' (dropdown), and a search button labeled 'Search by Permit Information'. Below these are fields for 'Project Name' (text input) and 'Start Date' (dropdown set to 08/08/2009) and 'End Date' (dropdown set to 08/27/2009). A note below the dates says '(For example 08/18/2008) (For example 08/18/2008)'. There is a link '▼Do not include Additional Criteria'. The section 'CITIZEN INFO' contains fields for 'Name' (text input), 'Age' (dropdown), 'Birthday' (dropdown set to 08/18/2008), 'City' (dropdown), and 'Are you License Professionor(Y/N)?' (radio buttons for Yes or No). A note below the city dropdown says 'Please submit other information here:' followed by a large text area. The 'Are you License Professionor(Y/N)?' field is highlighted with a red box.

## Configuring ASI Table Drill-Downs

Civic Platform offers an Application-Specific Information (ASI) Table that allows users to search for the value of a column by using a drill-down approach. This table displays in the application intake form or in the App Spec Info Table tab. The drill-down functionality guides the user through a series of windows that presents unique data choices based on previously-selected data field selections. When all of the selections complete, Civic Platform displays a drill-down table with the value results.

For example, you can prepare a table for multiple Business license types. You set the first option such as Agriculture and then assign subgroups such as Plants and Trees Cultivation, and Seeds and Crops Cultivation. You create additional groups for each of the subgroups, which narrows down the license options. After assigning the groups and subgroups, the options display in an ASI Table in the public user view. See [Figure 91: ASI Table Drill-Down User View](#) to view a completed ASI Table drill-down.

An example of preparing for ASI Field drill-downs for address selection. You set the first option as Country with various countries as subgroups. Then, for each subgroup, such as the United States, you can define states, such as New York, California, or Texas. Then, you can define cities for a state, such as San Ramon, San Diego, and Los Angeles for California.

The agency administrator must complete some configuration to display application-specific information (ASI) table drill-downs for the user. Besides setting Function Identifications (FIDs), defining the ASI table group and subgroups in Civic Platform Classic Administration, creating or editing existing shared drop-down lists, and creating or editing existing ASI table drill-down records, the administrator must configure the page flow. For information on configuring the Civic Platform components of this feature, including creating and editing ASI table drill-down records, see "Managing ASI Drill-downs" in the "Form Layout Editor" chapter of the *Accela Civic Platform Administrator Guide*.

**Figure 91: ASI Table Drill-Down User View**

Select Business of Activity (Select all that apply)		
Nature of Activity	Subnature of Activity	Business Activity
<input checked="" type="checkbox"/> Agriculture	Plants and Trees Cultivation	Tea Cultivation
<input type="checkbox"/> Agriculture	Plants and Trees Cultivation	Vegetables-Bearing Fruits Cultivation
<input type="checkbox"/> Agriculture	Seeds and Crops Cultivation	Forage Cultivation Such As Clover "Berceent" And Oil Seeds Cultivation
<input checked="" type="checkbox"/> Agriculture	Seeds and Crops Cultivation	Aluminium Sections And Extracts
<input type="checkbox"/> Building Materials	Iron and Basic Metals Products	Aluminium Extrusion
<input type="checkbox"/> Building Materials	Iron and Basic Metals Products	Cable Trays, Cross Arms & Accessories
<input checked="" type="checkbox"/> Building Materials	Iron and Basic Metals Products	Casting Of Iron And Steel (Finished And Semi-Casting Of Non-Ferrous Metals Such As Aluminum, Cement & Gypsum Trading
<input type="checkbox"/> Building Materials	Iron and Basic Metals Products	Manufacture Of Articles Of Asbestos Cement, Fibre
<input type="checkbox"/> Building Materials	Premixed Concrete, Cement	Manufacture Of Articles Of Concrete And Cement,
<input type="checkbox"/> Building Materials	Premixed Concrete, Cement	Manufacture Of Building Materials Of Vegetable
<input type="checkbox"/> Building Materials	Premixed Concrete, Cement	Manufacture Of Cement, Lime & Plaster
<input type="checkbox"/> Building Materials	Premixed Concrete, Cement	Manufacture Of Ceramic Bricks, Roofing Tiles,
<input type="checkbox"/> Building Materials	Premixed Concrete, Cement	Manufacture Of Hollow Cement Blocks And Baked

**<< Back** **Next >>****To configure ASI table drill-downs in Citizen Access**

1. Ensure that the application type shows to Citizen Access.

For instructions, see “Adding an Application Type” in the License Renewal chapter of the *Accela Civic Platform Administrator Guide*.

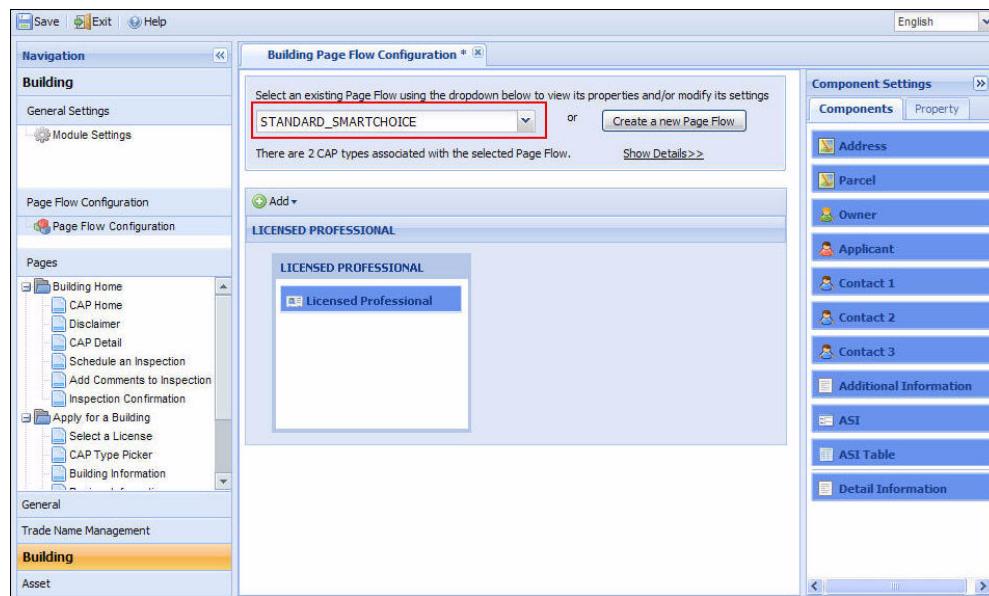
2. Set the ASI table drill-down view to ACA Only or Both.

For instructions, see “Managing ASI Drill-downs” in the Form Layout Editor chapter of the *Accela Civic Platform Administrator Guide*.

3. Navigate to **Civic Platform Admin> Setup > Citizen Access > Citizen Access Setup**.

4. Open the Page Flow for the desired module.

Citizen Access displays the *Page Flow Configuration* page.



For instructions on establishing the page flow, see [Chapter 9:Page Flow Configuration](#).

5. Add the ASI Table component to the page flow.
6. Click the **Save** button.

## Configuring ASI Field Drill-Downs

You can create a drop-down field to enable users to search for the value of an application-specific information field using a drill-down approach. The drill-down approach allows users to filter the list of value results by performing a search within the ASI drill-down result value data. The drill-down functionality guides the user through a series of drop-down lists that limits the selection values for subsequent fields based on previously-selected data. When all of the selections complete, Citizen Access displays the value results to the public user. You can apply the drill-down fields to multiple application-specific groups.

For example, your agency can create a drill-down in an application to gather address information. The first drill-down lists the country, such as The United States, Canada, United Arab Emirates, France, or Mexico. If the user selects United States, the next drill-down lists States such as California, Georgia, New York, and Massachusetts. If the user selects California, the third drill-down lists city options for California, such as Los Angeles, San Ramon, San Diego, San Francisco, or Anaheim. For an example of a drill-down field setup for Continent, Country, and City, see [Figure 92: ASI Field Drill-Down for Continent, Country, and City](#).

To prepare for implementation in Citizen Access, you must configure ASI fields in Civic Platform and configure ASI Drill-Down information in Civic Platform. In ASI field drill-down configuration, you must create or edit an existing ASI drill-down with ASI Type as ASI Field. Then apply the drill-down to Citizen Access by marking either the ACA Only or the Both option on the drill-down

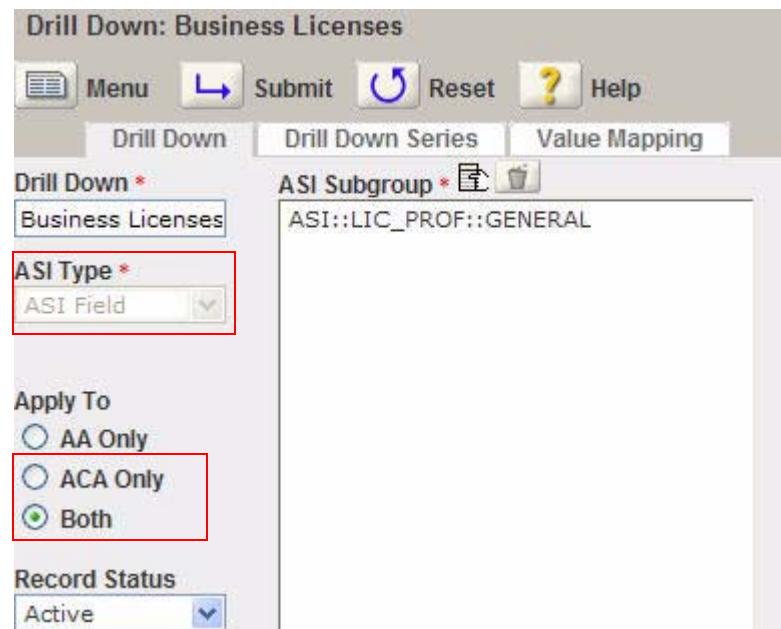
tab. Marking the Both option indicates you apply the drill-down to both Citizen Access and Civic Platform. See [Figure 93: Applying ASI Field Drill-Down to Citizen Access](#).

For ASI drill-down configuration details, refer to “Creating or Editing an ASI Field Drill-Down” in the “Form Layout Editor” chapter in the *Accela Civic Platform Administrator Guide*. See also, “Application Specific Information” chapter of the *Accela Civic Platform Administrator Guide*.

**Figure 92: ASI Field Drill-Down for Continent, Country, and City**



**Figure 93: Applying ASI Field Drill-Down to Citizen Access**



## Configuring Expressions for ASI or ASI Table Sections

The Expression Builder tool in Civic Platform enables you to configure expressions for the ASI target portlet or ASI table target portlet. You can use the expressions to set some ASI or ASI table fields to be required or read-only, force public users to enter acceptable values, block submission if needed, or populate a unique message based on a specific value the user entered in a previous field.

[Table 14: ASI and ASI Table Expressions](#) provides you a summary on the fields, variables, and actions that ASI or ASI table expressions can support. For more information on creating

expressions for use in Citizen Access, see the “Expression Builder” chapter in the *Accela Civic Platform Administrator Guide*.

**Table 14: ASI and ASI Table Expressions**

Target Portlet	Applicable Scope	Supported Fields and Variables	Applicable Action
ASI	Both Civic Platform and Citizen Access	<ul style="list-style-type: none"><li>• ASI form and fields</li><li>• Record detail fields</li><li>• Session variables</li></ul>	<ul style="list-style-type: none"><li>• onLoad</li><li>• onSubmit</li></ul>
ASI Table	Both Civic Platform and Citizen Access	<ul style="list-style-type: none"><li>• ASI fields</li><li>• ASI table form and fields</li><li>• Record detail fields</li><li>• Session variables</li></ul>	<ul style="list-style-type: none"><li>• onLoad</li><li>• onSubmit</li><li>• onPopulate</li><li>• onASITRowSubmit (Only in Citizen Access)</li></ul>

## Restricting Access to View Comments

You can restrict access to comments for inspection results and workflow tasks which applies to comments a user can enter and Standard Comments that he can add into the Comment field. If the content of an inspection result or a workflow task comment must be private or semi-private, modify the comment setting access on the Inspection Detail page or on the specific Workflow Task page. Refer to the steps in this section (below) for these two areas.

To hide all comments in an inspection results and a workflow task from all Citizen Access users, clear the Display Comments in ACA check box. If you want to display comments, you can display the check spelling link so public users can verify the spelling of their comment. You must enable a Standard Choice for functionality. See the section, “Configuring the Spell Checker” in the *Accela Civic Platform Administrator Guide*.

### To configure the access to view inspection results comments

1. Navigate to the Inspection portlet and select the inspection to which you need to restrict comment access.

2. Click the **Inspection Detail** tab.

Civic Platform displays the *Inspection Detail* page.

The screenshot shows the 'Inspection Detail' tab selected in a top navigation bar. Below the tabs, there are several input fields and dropdown menus. On the left, 'Inspection Type' is set to 'Compliance Visit'. To its right are 'Address' and 'Case #' (AEC-13-00105). Further right are 'Request Date' (11/05/2013), 'Request Time' (2:24), 'Requestor's Phone Number', and 'Unit Nbr' (dropdown menu). Below these are sections for 'Request Comment' (with a large text area), 'Scheduled Date' (11/06/2013), 'Scheduled Start Time' (4:23 AM), 'Total Time' (empty), 'Billable' (checkbox), and 'Vehicle ID' (empty). There is also a section for 'Inspection Date' (11/05/2013), 'Inspection Time' (4:23 AM), 'Result' (dropdown menu), and 'Department' (ACCELA). At the bottom, there is a 'Result Comment' section with a 'Standard Comment' link and a large text area. A red box highlights the 'Display Comment in ACA' checkbox and its sub-options: 'Comment Display in ACA' (checkbox checked) and 'All ACA Users', 'Record Creator', 'Licensed Professional', 'Contact', and 'Owner' (checkboxes all unchecked).

3. Mark the **Display Comment in ACA** check box to specify what types of users can view the comments. Choose one of the following:
- To enable Citizen Access users to view the inspection results comments, mark this check box.
  - To hide all comments from all Citizen Access users, clear this check box.
4. Mark the check boxes for Comment Display in ACA to indicate who can view inspection comments in ACA. Your options include: All ACA Users, Record Creator, Licensed Professional, Contact, and Owner.

**Note:** *The Standard Choice*

*DISPLAY\_INSPECTION\_COMMENT\_IN ACA controls the display of all inspection comments and overrides the settings in "Comment Display in ACA" and "Display Comment in ACA" in every inspection. If you do not configure the Standard Choice, comments display so all ACA registered or anonymous users can read them by default.*

**To configure the access to view workflow task comments**

1. Navigate to a module and record to which you need to restrict workflow task comment access.
2. Click the **Workflow** tab.
3. Click a Workflow task link.

Civic Platform displays the *Workflow Task Details* page.

The screenshot shows the 'Workflow Task Details' page for a record with ID 13CAP-00040. The 'Task Details' tab is selected, showing a tree view of 'Workflow Tasks' with 'Amendment Intake' expanded. A message indicates 'There currently are no ad hoc tasks defined.' On the right, there are fields for 'Status', 'Status Date' (set to 11/05/2013), 'Due Date' (set to 10/31/2013), 'Current Status', 'Department' (set to 'Current Department'), 'Staff' (set to 'Current User'), and 'Assigned to'. Below these, there are sections for 'Assigned to Department Processing Unit', 'Assigned to', and 'Assigned Date' (set to 10/31/2013). A 'Comments' section contains a link to 'Standard Comment'. At the bottom, there is a 'Comment Display in ACA' section with checkboxes for 'All ACA Users', 'Record Creator', 'Licensed Professional', 'Contact', and 'Owner'. The 'Display Comment in ACA' checkbox is checked and highlighted with a red border.

4. Mark the **Display Comment in ACA** check box to specify what types of users can view the comments. Choose one of the following:
  - To specify what ACA users can view the workflow task comments, mark this check box.
  - To hide all comments from all ACA users, clear this check box, and the Comment Display in ACA field is inactive.
5. Mark the check boxes to indicate who can view workflow task comments in ACA. Your options include: All ACA Users, Record Creator, Licensed Professional, Contact, and Owner.

## Assigning Conditions to Records

You can define a script and associate it with the *ApplicationSubmitAfter* event, so when a public user creates a record, the *ApplicationSubmitAfter* event can assign conditions to the record.

**To enable assigning conditions to records by EMSE**

1. Configure the Standard Choice ACA\_CONDITION\_AGENCY\_USER and set the Standard Choice Value to a valid department name.

This Standard Choice value defines a department which public users belong to.

For complete information on configuring a Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

2. Reference the getDeptforPublicuser.txt sample script to proceed with writing a script that sets the department name for the public user by reading from the Standard Choice ACA\_CONDITION\_AGENCY\_USER.

**Note:** Only Accela Delivery team members or system administrators who are trained in performing agency-wide functions should customize the event scripts. For further information on working with scripts, refer to the *Civic Platform Scripting Guide*.

3. Continue the script-writing by adding scripts that assign conditions to records.
4. Assign the scripts to the *ApplicationSubmitAfter* event which relates to Citizen Access.

## Displaying Conditions

Conditions comprises into two classes: conditions of approval and general conditions. The two classes share the same logic but are for different usages. Use conditions of approval to define certain requirements that must be met to receive the approval for a permit. Use a general condition to indicate a problem on the record, address, parcel, owner, contact, and licensed professional, which may prolong the permitting process until it is met. The condition severity is Lock, Hold, Notice, or Required. Conditions with different severity levels may have different effects on the record. Some conditions such as Lock and Hold prevent actions on an object. Other conditions such as Notice merely trigger a notice for users. This topic explains how to configure both classes of conditions for Citizen Access.

First, you must configure the conditions on the Condition Detail portlet in Civic Platform to enable the display of the conditions in Citizen Access. You just need to mark the “ACA” check box in the Display Notice section for the condition you want. See [Figure 94: Condition Display Notice in Civic Platform on page 315](#). The condition is then available in the Record Detail page, Fee Estimate page, and Receipt page of Citizen Access.

**Note:** Your agency can use an EMSE script to expose various general conditions on the Fee Estimate page. However, the general conditions must be standard conditions that have the “ACA Fee Estimate Page” check box marked in the Display Notice section. For more information, see [Displaying Conditions on the Fee Estimate Page on page 373](#).

After you configure the conditions, you can customize how the conditions appear on each web page through Citizen Access Setup. The customization process is very similar for the Record Detail page, Fee Estimate page, and Receipt page. The only difference is the starting page. This topic takes the Record Detail page as an example.

The Record Detail page displays a Condition Notice bar when a public user creates a new record and your agency administrator pre-defined standard conditions for the type of records. The Record Detail page also displays a Condition Notice bar when a public user views an existing record with conditions.

Conditions, regardless of general conditions or conditions of approval, fall into condition group and type. On the Fee Estimate page, there may be conditions related to multiple record types. If that is the case, conditions fall into record type or record type alias, and then fall into condition group and type. Among conditions of the same group and type, pending conditions precedes conditions that are met, if the met conditions also show. Among conditions of the same status, the most severe condition shows first. If the severity level is the same, the condition of the highest priority shows first.

For more information about configuring conditions, see “Configuring Conditions” in the “Streamlining Data Processing” chapter of the *Accela Civic Platform Configuration Reference* and see the “Condition” chapter in the *Accela Civic Platform Administrator Guide*.

Figure 94: Condition Display Notice in Civic Platform

The screenshot shows a Windows Internet Explorer window titled "New Condition - Windows Internet Explorer". The interface is a form-based configuration tool. At the top, there are four buttons: "Submit", "Reset", "Cancel", and "Help".  
  
The form fields are organized into several sections:

- Condition Name:** A required field with a dropdown arrow.  
Input: [empty input field]
- Status:** A dropdown menu showing "Enabled".  
Input: Enabled
- Condition Type:** A dropdown menu showing "-Select-".  
Input: -Select-
- Short Comments:** A required field with a dropdown arrow.  
Input: check spelling
- Severity:** A dropdown menu showing "-Select-".  
Input: -Select-
- Priority:** A dropdown menu showing "-Select-".  
Input: -Select-
- Inheritable:** A dropdown menu showing "No".  
Input: No
- Long Comments:** A large text area containing the text "check spelling".
- Additional Information:** A large text area containing the text "check spelling".
- Display Notice:** A section enclosed in a red box. It contains three checkboxes:
  - Accela Automation
  - ACA
  - ACA Fee Estimate Page
- Include in Condition Notice:** A section with two checkboxes:
  - Condition Name
  - Short Description

**Figure 95: Conditions on the Record Detail Page**

The screenshot shows the Citizen Access Record Detail page for record 13CBB-00000-00003, which is a Restaurant. The top navigation bar includes Home, Building, Licenses, Service Request, and Airport, with a search bar for applications.

**Conditions Section:**

- A notice was added to this record on 11/07/2013.
- Condition: Food Safety Condition Severity: Notice
- Total Conditions: 4 (Notice: 1, Required: 3)

**Conditions of Approval Section:**

- Hide Those Met**: Shows 1-4 of 4 results.
- Conditions of Approval**: 3 Pending, 1 Met.
- Required for Building/Building Permit/Commercial/Restaurant
- BCE\_ACC** (Required):
  - Accessory structure permit completed
  - Pending | Medium | 10/11/2013
  - [View Details](#)
- BC\_CELPREF** (Required):
  - Community development cellular prefinal
  - Pending | Medium | 10/11/2013
  - [View Details](#)
- BCE\_ALM** (Required):
  - Fire alarm permit completed
  - Pending | Low | 10/11/2013
  - [View Details](#)
- B-BASEMENT**:
  - Basement inspections have been added.
  - Met | Medium | 10/11/2013
  - [View Details](#)

## Topics

- Displaying General Conditions
- Displaying Conditions of Approval

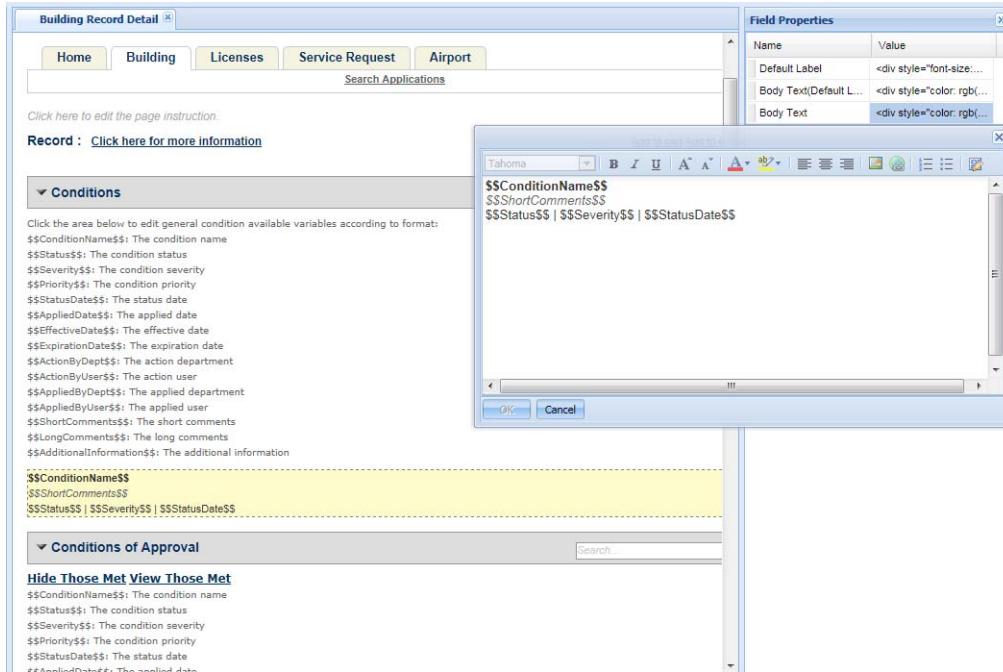
## Displaying General Conditions

The Conditions section displays the general conditions relating to the record. The conditions display in an orderly fashion by condition group, condition type, and then by individual condition.

### To customize the display of the Conditions section

1. Navigate to **Citizen Access Setup > Module tab > Record Detail page > Conditions** section.
- Citizen Access displays the module Record Detail page.*
2. Do any of the following:
    - Click the section header and update its field properties such as the font, font color, and so forth.

- Add or edit instructional text under the section header in the section field properties.
- Use the HTML editor to decide which information each condition includes and how the information appears.



For detailed information, see [Chapter 10: Working with Web Pages on page 160](#).

## Displaying Conditions of Approval

The Conditions of Approval section displays the conditions of approval that relate to the record. The conditions display in an orderly fashion by condition group, condition type, and then by individual condition. Public users can click the “View Those Met” or “Hide Those Met” link to show the conditions of approval that are already met. If there are too many conditions of approval on the Record Detail page, public users can search for conditions of approval by entering a keyword in the search box next to the section heading. Public users can also click the “Download results” link to export the list of conditions of approval to a comma-separated value (CSV) file.

To display conditions of approval in Citizen Access, you must set the value of Standard Choice CONDITIONS\_OF\_APPROVALS to Yes in Civic Platform and define some standard conditions of approvals in Civic Platform as shown in [Figure 94: Condition Display Notice in Civic Platform on page 315](#). For more information about configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*. Also see the “Condition” chapter in the *Accela Civic Platform Administrator Guide*, and “Working with Conditions of Approval” in the “Condition” chapter of the *Accela Civic Platform User Guide*.

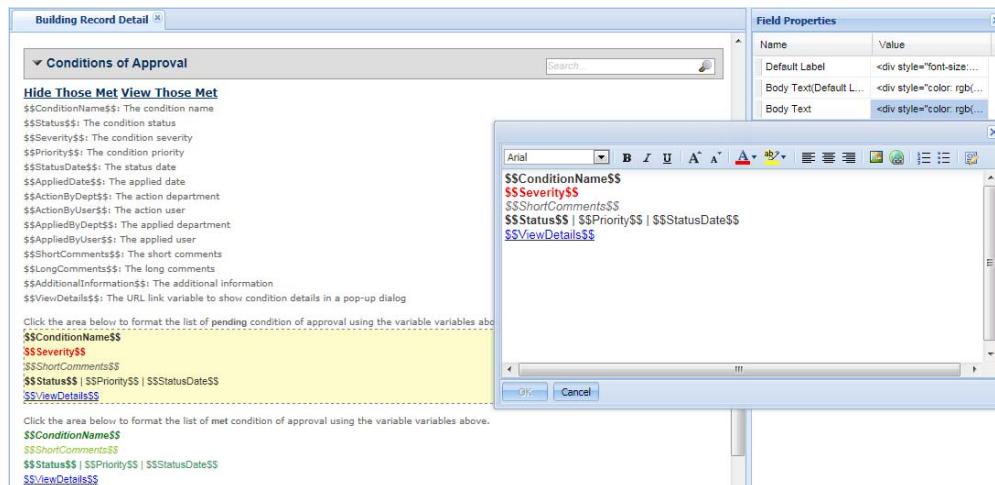
## To customize the display of the Conditions of Approval section

1. Navigate to **Citizen Access Setup > Module tab > Record Detail page > Conditions of Approval** section.

*Citizen Access displays the module Record Detail page.*

2. Do any of the following:

- Click the section header and update its field properties such as the font, font color, and so forth.
- Add or edit instructional text under the section header.
- Change the label of the **Hide Those Met** and **View Those Met** links.
- Use the HTML editor to decide which information each condition of approval includes and how the information appears.



**Note:** The Conditions of Approval section on the Record Detail page has the following differences from that on the Fee Estimate page and the Receipt page:

- Only the Record Detail page allows you to customize the pending condition of approval list and the met condition of approval list separately.
- The variables available for the Conditions of Approval section vary depending on the web page that you are customizing. For example, only the Record Detail page allows you to use the **\$\$ViewDetails\$\$** variable, which enables public users to click a link to view the details of a condition of approval in a pop-up window. You can customize the display of the pop-up window after navigating to Citizen Access Setup > Module tab > Conditions of Approval Detail page.
- Only the Record Detail page has an expand/collapse icon and a search box next to the Conditions of Approval section heading.

For detailed information, see [Chapter 10: Working with Web Pages on page 160](#).

## Configuring Contacts

Standard Choice CONTACT TYPE defines contact types. For more information about configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

Citizen Access provides the contact sections in the application intake form so that users can add contact information to the application. The contact sections include Applicant, Contact 1, Contact 2, Contact 3, and Contact List. The first four sections are single-contact sections, which means users can only add one contact entry to each of them. The Contact List section can contain multiple contact entries.

You can assign one contact type to each of the single-contact sections. See [Assigning Contact Type to the Single-Contact Components on page 320](#).

You can assign contact types to a module. You can do this either in Citizen Access Setup or in Civic Platform. To learn how to assign contact types to a module, in Citizen Access Setup see [Assigning Contact Types to a Module on page 323](#), in Civic Platform see the “Adding or Editing Contact Types” section in the “Security Policies” chapter in the *Civic Platform Administration Guide*.

The assigned contact types to a module become the available contact types for the Contact List component in the page flows. The contact types also become the options for the Contact Type filter in the Search by Contact form under the module. You can further limit the contact types to display in the Contact List section as the available options for public users’ choices. See [Restricting Contact Types and the Number of Contacts for Contact List Section on page 330](#).

You can limit who can view the contact information. See [Contact Information Controls on page 111](#).

An application intake form can contain either the single-contact sections, or the Contact List section, but not both of them. To configure which sections (components) display in the application intake form, see [Working with Components on page 148](#). You can customize how public users enter the contact and contact address information in each contact section. See [Specifying Data Source for Contact Components on page 321](#) and [Customizing the Contact and Licensed Professional Section in a Module Information Page on page 325](#).

It is recommended best practice to use this section with the “People” chapter in the *Accela Civic Platform Administrator Guide* as well as with the *Accela Civic Platform Configuration Reference*.

### Topics

- [Assigning Contact Type to the Single-Contact Components](#)
- [Specifying Data Source for Contact Components](#)
- [Assigning Contact Types to a Module](#)
- [Customizing the Contact and Licensed Professional Section in a Module Information Page](#)
- [Restricting Contact Types and the Number of Contacts for Contact List Section](#)

## Assigning Contact Type to the Single-Contact Components

All the contact types defined in the Standard Choice of CONTACT TYPE are available for these components, Applicant, Contact 1, Contact 2, and Contact 3, in the Page Flow Configuration page. You can assign one contact type to each of the single-contact components in a page flow. For information about configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

### To assign a contact type to a single-contact component

1. Navigate to the desired module.
2. Choose **Page Flow Configuration** in the left panel.
3. Open the desired page flow or create a new one.

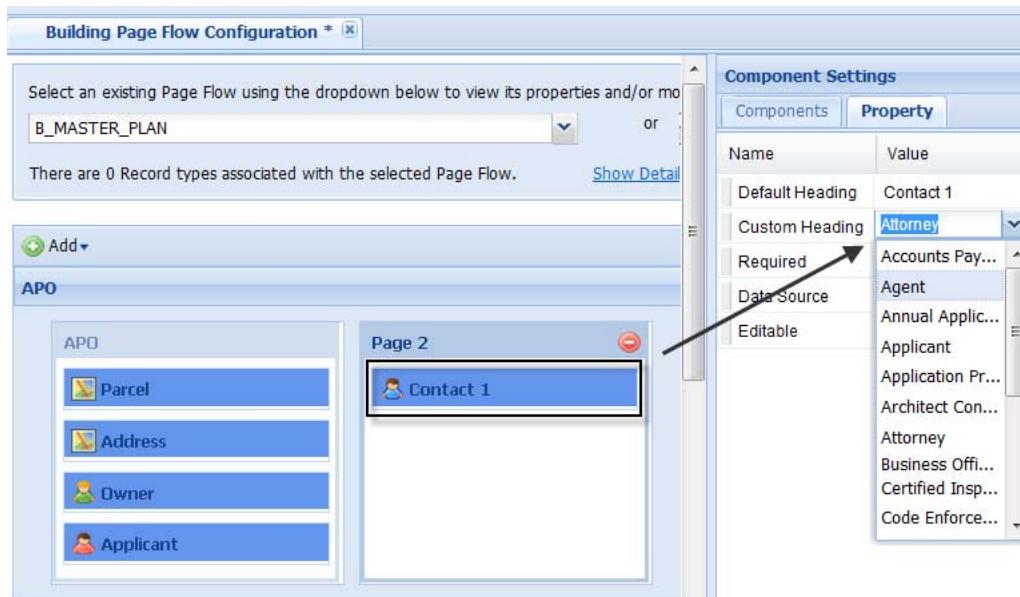
To learn how to create a new page flow, see [Chapter 14: Creating Records on page 284](#).

4. Drag and drop a single-contact component, Applicant, Contact 1, Contact 2, or Contact 3, to a page where you want to display the sections (components).

To learn how to add a component to a page in a page flow, see [Working with Components on page 148](#).

5. Click the component.

*Citizen Access Setup displays the Property panel on the right side of the screen.*



6. Click the **Custom Heading** drop-down list and select a desired contact type.

By default, the first contact type is auto-assigned to the component. The contact types shows in the alphanumeric order in the drop-down list.

7. Click the **Save** button on the upper left of the screen.

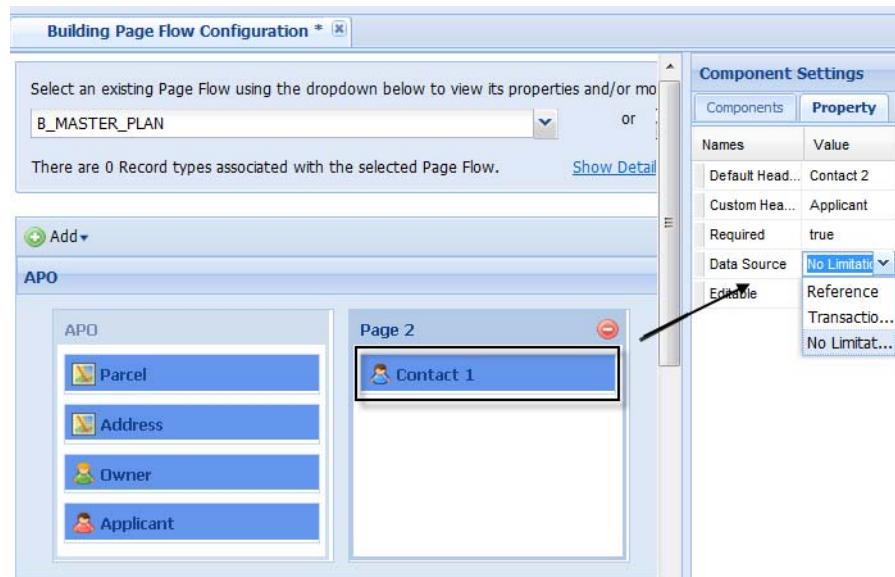
## Specifying Data Source for Contact Components

You can configure whether public users can manually enter the contact information or select from reference contacts by specifying the Data Source for a Contact section.

### To specify a data source to a contact component

1. Navigate to the desired module.
2. Choose **Page Flow Configuration** in the left panel, and open the desired page flow.
3. Click the contact component, Applicant, Contact 1, Contact 2, Contact 3, or Contact List in the page flow.

*Citizen Access Setup displays the Property panel on the right side of the screen.*



4. Click the **Data Source** drop-down list and select a desired Data Source.

- No Limitation (Default Value)

On the pre-condition that the contact search feature is enabled (See [Enabling Contact Search on page 69](#)), public users can click the Search button in the Contact section to add contacts by selecting reference contacts. The Standard Choice AUTO\_SYNC\_PEOPLE determines whether Civic Platform links or copies the contact added to the record to its reference source. For information about configuring the Standard Choice, refer to the [Accela Civic Platform Configuration Reference](#).

With No Limitation data source, public users can manually enter the contact information and submit the record.

- If the entered information matches a reference contact, the Standard Choice AUTO\_SYNC\_PEOPLE determines whether Civic Platform links or copies the contact added to the record to its reference source.
- If the entered information does not match any existing reference contacts, and none of the fields duplicate with an identifier of existing reference contacts, Civic Platform creates a reference contact based on the entered information. If the contact type that the public user selects is for transaction only, Civic Platform sets the reference contact type to Individual or Organization depending on the individual or organization flag of the contact in the application. If the flag is null, Civic Platform sets the reference contact type to Individual.
- If the entered information does not match any existing reference contacts, but some field duplicates with an identifier of existing reference contacts, Citizen Access creates a transaction contact for the record.

With No Limitation data source, if AUTO\_SYNC\_PEOPLE is enabled for the current module, the Also Known As section does not display in the contact section. If AUTO\_SYNC\_PEOPLE is off, the Also Known As section can display in the Contact section with the Add and Delete functions. Public users can view but cannot edit all the existing also-known-as names of a contact, and can add, delete, or edit new also-known-as names.

- If a public user saves a partial application with new also-known-as names, Citizen Access does not save the new also-known-as names if the public users define contact manually, but saves the names if the contact comes from the reference via the auto-fill through search function. Citizen Access checks and makes sure not to save duplicate also-known-as names to a reference contact.
- If a public user submits an application with new also-known-as names, Citizen Access synchronizes the new also-known-as names to the reference source of the contact.

- Reference

On the pre-condition that the contact search feature is enabled (See [Enabling Contact Search on page 69](#)), public users can only click the Search button in the Contact section to add contacts by selecting reference contacts. The Standard Choice AUTO\_SYNC\_PEOPLE determines whether Citizen Access links or copies the contact added to the record to its reference source.

With Reference data source, the Also Known As section displays as read-only in the Contact section. Public users can view all the existing also-known-as names of a contact.

- Transaction

Public users can only manually enter the contact information and create a transaction contact for the record.

With this data source, the Also Known As section does not display in the Contact section no matter whether you add the section to page flows or not.

5. Click the **Save** button on the upper left of the screen to save the setting.

## Assigning Contact Types to a Module

You can assign contact types to a module either in the Contacts section in the Module Information page or in the Search by Contact form in the Record Home page.

**Note:**

*You can also do this in Civic Platform.*

*The last setting in Citizen Access Setup or Civic Platform takes effect on both sides, assuming that you set the Value of the Standard Choice of ENABLE\_CONTACT\_TYPE\_FILTERING\_BY\_MODULE to "Yes".*

*Otherwise, if you set the Standard Choice Value to "No", the configurations in Citizen Access Setup or Civic Platform are invalid, and all contact types created in the Standard Choice of CONTACT TYPE are available for all modules.*

*To learn how to assign contact types to a module in Civic Platform, see the "Adding or Editing Contact Types" section in the "Security Policies" chapter in the Accela Civic Platform Administrator Guide for detailed information.*

*To learn how to create a Standard Choice, see the Accela Civic Platform Configuration Reference.*

The assigned contact types to a module become the available contact types for the Contact List component in the page flows. The contact types also become the options for the Contact Type filter in the Search By Contact form on the module home page.

### Topics

- [Assigning Contact Types to a Module from the Contacts Section](#)
- [Assigning Contact Types to a Module from the Search by Contact Form](#)

## Assigning Contact Types to a Module from the Contacts Section

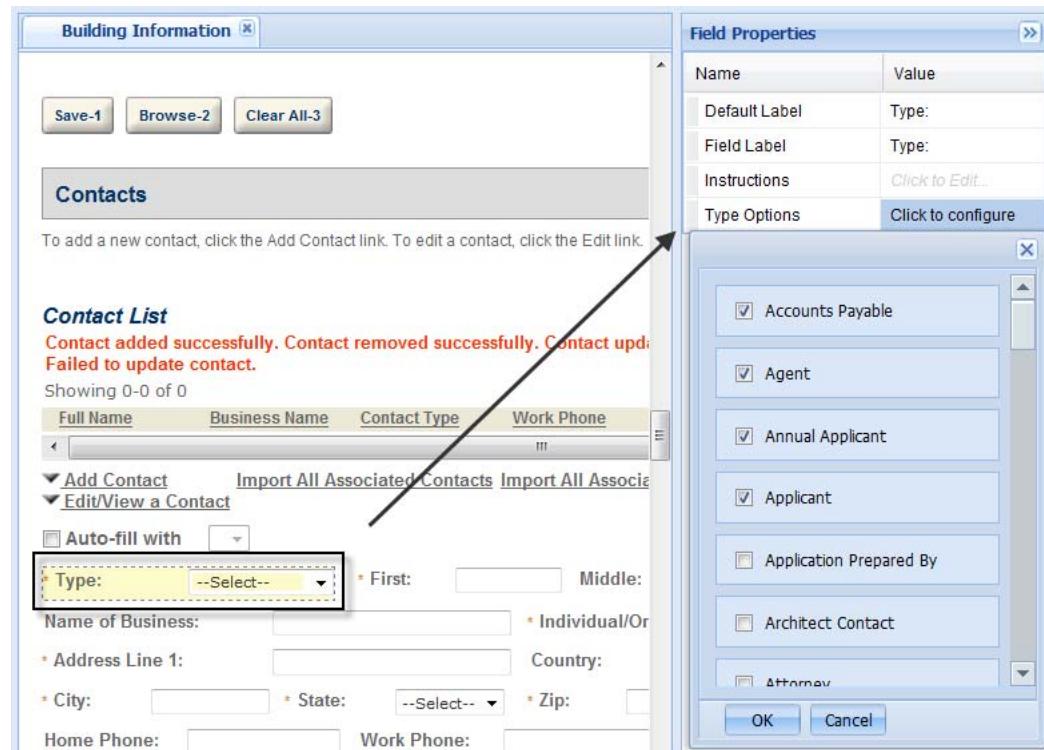
### To assign contact types to a module from the Contacts section

1. Navigate to the desired module.
2. Select the **Module Information** page from the Apply for a Module folder in the Pages area.
3. Locate the **Contacts** section from the Module Information page.
4. Click the **Type** field.

*Citizen Access Setup displays the Field Properties panel on the right side of the screen.*

- Click the **Type Options** cell in the Value column.

*Citizen Access Setup* pops up a window with a list of available contact types.



- Mark the check box next to the contact types that you want to reveal to public users.
- Click the **OK** button in the pop-up window.
- Click the **Save** button in the upper left of the screen.

## Assigning Contact Types to a Module from the Search by Contact Form

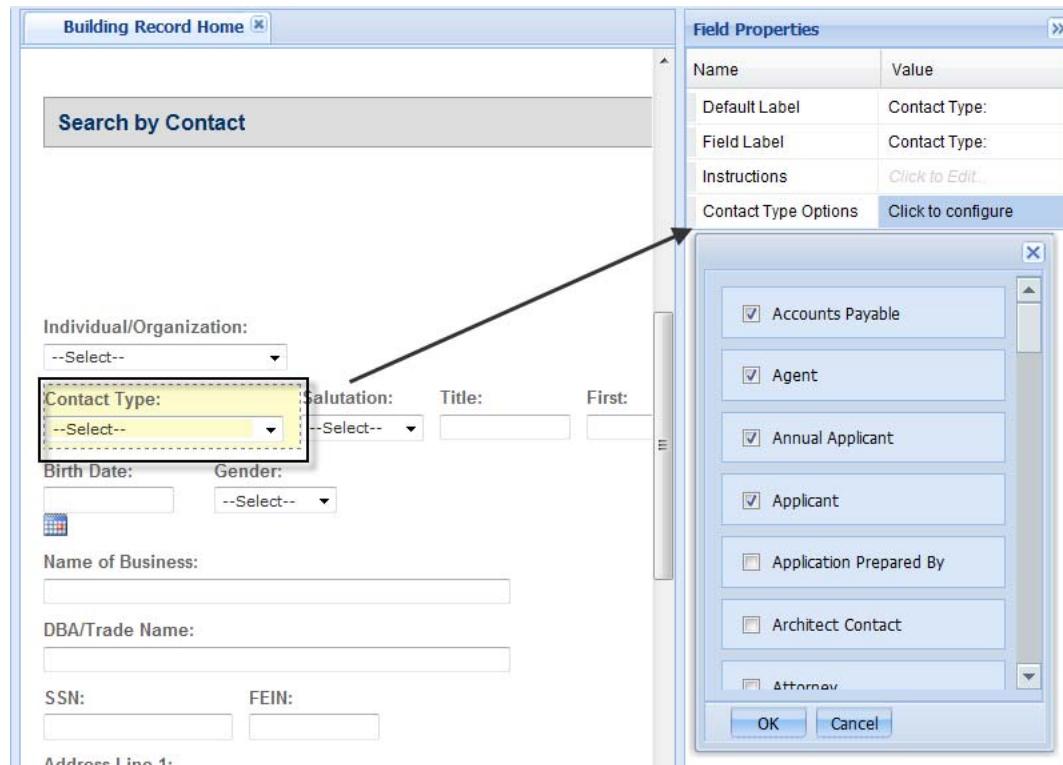
### To assign contact types to a module from the Contacts section

- Navigate to the desired module.
- Select the **Record Home** page from the Module Home folder in the Pages area.
- Locate the **General Search** section in the Record Home page.
- Select Search by Contact from drop-down list in the section header.
- Click the **Contact Type** field.

*Citizen Access Setup* displays the Field Properties panel on the right side of the screen.

6. Click the **Contact Type Options** cell in the Value column.

*Citizen Access Setup* pops up a window with a list of available contact types.



7. Mark the check box next to the contact types that you want to reveal to public users.
8. Click the **OK** button in the pop-up window.
9. Click the **Save** button in the upper left of the screen.

## Customizing the Contact and Licensed Professional Section in a Module Information Page

After you have added a Contact component to a module page, you can customize it for collecting the information required by your agency. You can access the page very easily through the module pages tab. For information on customizing module pages, see [Chapter 10: Working with Web Pages on page 160](#).

### To customize the Contact and Licensed Professional section of a module information page

1. Login to Citizen Access Setup.
2. Select a module to which you have added the Contact component (such as Building).

3. From the **Pages** section, select the module information page.

*Citizen Access displays the module information page for the selected module.*

4. Scroll to the Contact section of the page, and modify the page elements as desired. For information on customizing module pages, see [Chapter 10: Working with Web Pages on page 160](#).

**Note:** *A contact template field can be available in the ACA Contact Information section if you set its ACA Displayable flag to Yes, and the security of the hosting ASI group is Full or Read.*

5. Add the contact access setting section. “What level of access would you like this contact to have for this record?” is one of the available fields in the Contact component. If you mark the field as visible, when public users add a contact to a record, they can configure the access level of the contact to the record. The access permission that a record creator can assign is limited to the access right that he/she owns.
6. Configure the Standard Choice ENABLE\_CONTACT\_ADDRESS\_VALIDATION, CONTACT\_ADDRESS\_TYPE and EXTERNAL\_CONTACT\_ADDRESS\_SOURCE\_[SOURCE Name] if you want to validate certain contact addresses against external address source. For information about configuring the Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

With the validation feature enabled, after public users click the Save Address button, they can either select an matching address from the validation source, or cancel the validation and create an address with the entered information. If you want to customize the pop-up Matching Address List page, go to the General tab, and customize the **Validated Contact Address** page under Validated Address.

When public users view a contact address in an application, the Validated field of the address displays the validation status:

- Null or empty: Civic Platform did not validate this contact address.
- No: Civic Platform validated the contact address, but the validation failed, or public users did not select a valid contact address.
- Yes: Civic Platform validated the contact address, and the validation passed.

7. From the **Pages** section, select the People folder, and customize the field label, field size, and add a watermark or instructional text functionality of the following pages:

- **Look Up Contact**

The Look Up Contact window displays when public users click Look Up in the Contact section.

**Look Up Contact**

Contact Type:

First Name:  Middle:  Last:

Name of Business:  Country:

Home Phone:  Work Phone:  Mobile Phone:

- **Contact Info**

If public users click Add New in a single contact section or click Edit to edit a saved contact, the Contact Info window displays. Use it to add contact information.

If public users click Add New in a multiple contact section, •Select Contact Type displays first, followed by the Contact Info window.

If public users click Select from Account or Look Up to select a contact, the Contact Info window displays only when the selected contact does not contain all the information required for a record contact.

Required Contact Type Minimum  
Applicant 1

**Contact Information**

\* First Name:  Middle:  \* Last:  \* Name of Business:

\* Home Phone:  \* Work Phone:  \* Mobile Phone:

**Contact Addresses**

Add Additional Contact Address

To edit a contact address, click the address link.  
Primary contact address is required.

Action	Address Type	Address	Primary	Recipient	Phone
Actions ▾	Billing Address	2_2_2	Yes	11	111-111-1111

- Select Contact Type

When public users add a contact in a multiple contact section, the Select Contact Type window displays. Use it to select the contact type before entering the contact details.

The screenshot shows a modal dialog titled "Select Contact Type". At the top, there is a message: "Showing 0-0 of Action No records found". Below this is a dropdown menu labeled "Contact Type:" with the option "--Select--" selected. At the bottom of the dialog are two buttons: "Continue" and "Discard Changes".

- Select Contact from Account

The Select Contact from Account window displays when public users click Select from Account in the Contact section.

The screenshot shows a modal dialog titled "Select Contact from Account". It contains the instruction "Select a contact to attach to this application." and a message "Showing 1-8 of 8". Below this is a table with three columns: "Category", "Type", and "Name". The table lists three entries, all of which are "Associated Contact" type. The third entry is highlighted with a blue background. At the bottom of the dialog are two buttons: "Continue" and "Discard Changes".

Category	Type	Name
<input type="radio"/>	Citizen	Caron, Inc.
<input type="radio"/>	Individual	20130401-F 20130401-H
<input type="radio"/>	Individual	20130401-F 20130401-H

After public users select a contact to add as a record contact, they can further select the contact type (only in a multiple contact section) and then select contact addresses to associate with the record contact.

The screenshot shows a modal dialog titled "Select Contact from Account". It includes a dropdown menu for "Contact Type:" with the option "--Select--" selected. Below this, there is a message: "Select additional addresses for this contact to attach to the record." and "Required Contact Address Type:". A table below shows "Showing 1-1 of 1" with one entry: "Address Type" (checkboxes for "Recipient" and "Billing Address"), "Recipient" (value "11"), and "Address" (value "2, 2, 2"). At the bottom of the dialog are two buttons: "Continue" and "Discard Changes".

Address Type	Recipient	Address
<input type="checkbox"/> Billing Address	11	2, 2, 2

Similarly, the Select License from Account window displays when public users click Select from Account in the Licensed Professional section.

- Contact Address Info

If you set the Standard Choice ENABLE\_CONTACT\_ADDRESS to Enabled, the Contact Address Info window displays when public users click Add Additional Contact Address, or when they select to edit a contact address.

Be aware that when Citizen Access checks for matching reference contacts against the contact information in the application, the information in the contact address section is exclusive of the search criteria. When Citizen Access links or copies an existing reference contact to the application, it adds the newly-added contact addresses to the reference contact while also remain in the application.

**Note:** *When public users submit an application with a reference contact address which duplicates an existing active one in the same reference contact, Citizen Access directly replaces the duplicate contact address in the application with the existing reference contact address.*

- Licensed Professional Info

If public users click Add New in the Licensed Professional section, the Licensed Professional Info window displays. Use it to add licensed profession information.

If public users click Look Up to select a licensed professional, the Licensed Professional Info window displays only when the selected licensed professional does not contain all the information required.

If public users click Select from Account, and there is only one license associated with their account, the Licensed Professional Info window displays when the licensed professional does not contain all the information required.

- Look Up License

The Look Up License window displays when public users click Look Up in the Licensed Professional section.

Licensed Professional Information

\* License Type:

State License Number:

First:

Middle:

Last:

Name of Business:

Country:

City:

State:

Zip:

Home Phone:

Mobile Phone:

Fax:

[Discard Changes](#)

- Select License from Account

When public users click Select from Account in the Licensed Professional section, and there are multiple licenses associated with their account, the *Select License from Account* window displays.

Select License from Account

Showing 1-2 of 2

<input type="checkbox"/> License Number	License Type	Licensed Professional Name	Business License #
<input type="checkbox"/> P00002	Provider	Mike Toy	
<input type="checkbox"/> P00001	Provider	Bob m zhang	

[Discard Changes](#)

If the Select License from Account window displays from a multiple licensed profession section, the license options display with check boxes, so public users can select one or more licenses to add. If the Select License from Account window displays from a single licensed profession section, the license options display with radio buttons, so public users can only select one license to add.

8. Click **Save**.

*Citizen Access applies the settings you specified.*

## Restricting Contact Types and the Number of Contacts for Contact List Section

One of the following situations provides the available contact types for the Contact List component. You can further determine which contact types can reveal to the Contact List section in the application intake form.

- If your agency creates the ENABLE\_CONTACT\_TYPE\_FILTERING\_BY\_MODULE Standard Choice and set its Value to “No”, all the contact types created in the CONTACT TYPE Standard choice become the available contact types for the Contact List component for your choice.
- If your agency creates the ENABLE\_CONTACT\_TYPE\_FILTERING\_BY\_MODULE Standard Choice and set its Value to “Yes”, the available contact types for the Contact List

component are the ones administrators assigned last time for a module in either Citizen Access Setup or Civic Platform.

- If your agency disables or does not create the ENABLE\_CONTACT\_TYPE\_FILTERING\_BY\_MODULE Standard Choice, the available contact types for the Contact List component are those last time you assigned for the module in Citizen Access Setup.

To learn how to assign contact types for a module, in Citizen Access Setup see [Assigning Contact Types to a Module on page 323](#), in Civic Platform see the “Adding or Editing Contact Types” section in the “Security Policies” chapter in the *Civic Platform Administration Guide*. For information about configuring the Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

**To restrict contact types and set the maximum and minimum number of contacts for each contact type**

1. When you add the Contact List component a page in the page flow, click the Contact List component on the page.

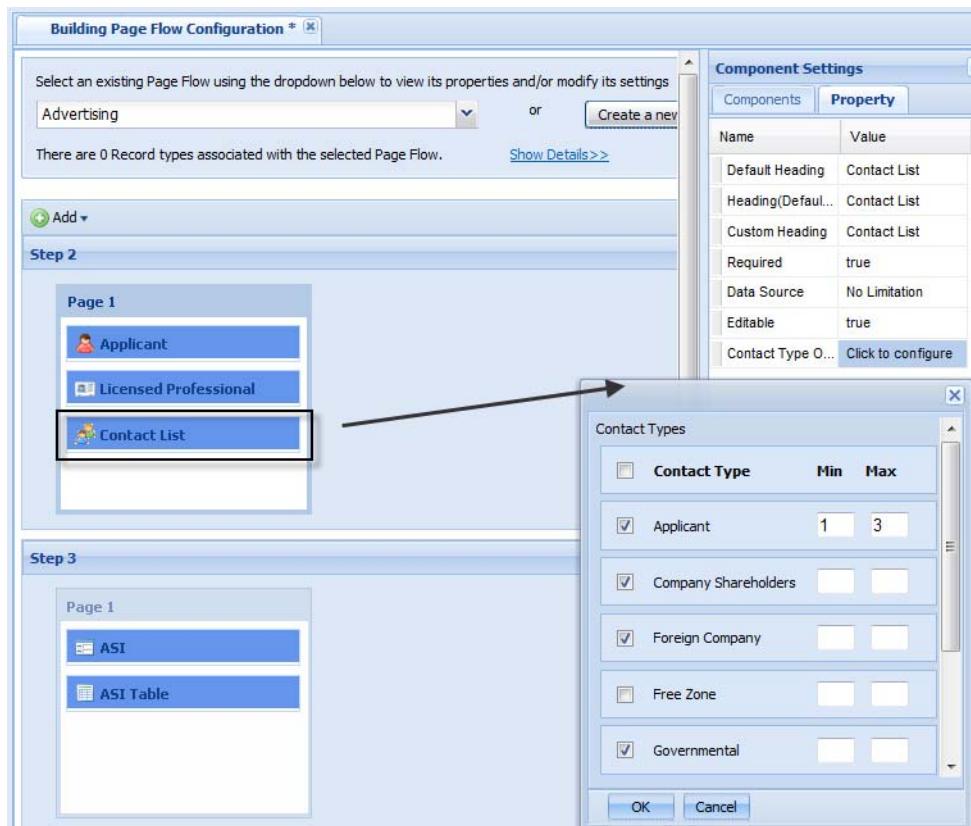
To learn how to add a component to a page in a page flow, see [Working with Components on page 148](#).

2. Click **Contact Type Options** in the Value column in the Property panel.

*Citizen Access Setup* pops up a window with a list of contact types.

3. Mark the check box for the contact types that you want to reveal to public users in the application intake form.

4. For each selected contact type, set the minimum and maximum number of contacts that you allow users to add to the Contact List section for that contact type.



5. Click the **OK** button on the pop up window.  
 6. Click the **Save** button on the upper left of the screen.

## Document Attachments

Citizen Access provides an Attachments section on the Record Detail page. By default, the section displays the list of documents uploaded for a record. If you enable the people attachment feature (see [Account Settings on page 59](#)), the section also provides the “View People Attachments” link. Public users can click the link to view the documents of the licensed professional that relate to the record.

You can define which documents public users can associate to an application and indicate who can view the document type. Then, you must grant permissions or set user limitations with the attachment functionality.

Configuration requires that you first configure the document group, then the document types in that document group, and then associate the document group to an application type. When you associate the document group to the application type, you can grant permissions and/or set limitations to documents exposed in ACA.

Administrator can restrict uploaded file size and extensions. Administrator configures the EDMS Standard Choice to set maximum size for file uploads and the ACA\_CONFIGS Standard Choice to specify the prohibited file extensions. For information about configuring the Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

### Topics

- Defining Documents Types for Record Types
- Defining File Size Limit and Prohibited File Type
- Defining Public User Permissions for Attachments
- Defining Document Deletion Permissions
- Adding the Attachment Section to Page Flows

## Defining Documents Types for Record Types

This function defines the types of documents ACA users can upload and attach to a record online. Group the various document types, such as the various photo types, spreadsheets, or word documents into a document group. Then, associate the document group code to a record type. This feature is particularly useful so that public users can upload a graphical representation as to a building project or provide legal documents supporting a case.

Administrators can add or remove document types to a document group, and modify the possible types of documents that a public user can associate with a record. However, users cannot change or modify the document group after a record is created.

To configure this feature you must enable the related Function Identification (FID) numbers [0108 Admin Document Type and 0065], configure the document group code and document types, and associate the document code to an application type. For more information about document codes, see the section of “Managing Documents for Attachments” in the “Plan Review” chapter in the *Accela Civic Platform Administrator Guide*. For information about configuring the FID, refer to the *Accela Civic Platform Configuration Reference*.

### To define ACA document types

1. Verify the pre-requisite configurations are complete:
  - Enable FID 0108 **Admin Document Type** and 0065 **Admin Application Types** to full access for the agency.
2. Create document codes with document types for the records created in ACA. For detailed instructions, see the section of “Managing Documents for Attachments” in the “Plan Review” chapter in the *Accela Civic Platform Administrator Guide*.

3. Enter the Document Code in the Document Code for ACA field for an Application Type enabled to ACA.

The screenshot shows the 'Application Category - Edit' form. At the top, there's a note: 'Use this form to edit Application Category.' Below it, there are several configuration fields:

- Enable For ACA?**: A checkbox labeled 'Enable Application' is checked and highlighted with a red box.
- Renewal CAP Type**: A dropdown menu showing 'AMS/AAM641/AAM641/AAM641'.
- Group**: Building
- Type**: ACA
- Subtype**: Demo
- Category**: \* SPEAR TEST (Can not Edit, Application already created with the category name)
- Application Type Alias**: Building Residential
- Status**: Enable (radio button selected)
- Fee Schedule\***: 14 DAY TEMP
- Application Type Icon**: A text input field with a 'Browse...' button.
- Enforcement Type**: A dropdown menu.
- Inspection Group Code**: AutoAssign
- Workflow\***: ACHIEVO
- Application Specific Info Group Code**: PA\_SPEC\_INFO
- SmartChoice Group Code\***: 07ACC-03284EXPRESSION
- Page Flow Code For ACA**: Applying for a Permit\_1
- eMail For Hearing Notification**: A dropdown menu.
- Expiration Code**: NONE
- Application Key Mask\***: ACA-NMT
- ID Mask**: A dropdown menu.
- Receipt Number Scheme**: A dropdown menu.
- Document Code**: ACA
- Document Code For ACA**: ACA (highlighted with a red box)
- Application Status Group Code**: A dropdown menu.

4. Click the **Submit** button.

## Defining File Size Limit and Prohibited File Type

You can control the type and size of files uploaded in Civic Platform and Citizen Access. This helps prevent malicious files from being submitted by the public and gives you more control over your storage capabilities.

**Note: Accela's recommended maximum file size is 50MB.**

Things to keep in mind when making these decisions....

- What is your document storage capacity?
- What kind of performance do you receive when uploading large files?
- What type of documents are required for submission?
- What is the typical size of the electronic documents you receive?
- What files do you not want to accept?

To set the file size limit, configure the Standard Choice named "EDMS". Set the maximum size for file uploading files to Citizen Access by adding the parameter, ACA\_EDMS\_DOCUMENT\_SIZE\_MAX=50MB, to the Value Description field.

To specify the prohibited file types, configure the Standard Choice ACA\_CONFIGS, as follows:  
 Standard Choice Value ACA\_EDMS\_DISALLOWED\_FILE\_TYPES  
 Standard Choice Value Description: <enter the file type extensions, using the following syntax:

*.html;.htm;.mhtml*. If you do not specify any file types, public users can upload all file types to Citizen Access.

For more information about configuring this Standard Choice, refer to the *Civic Platform Configuration Reference*.

## Defining Public User Permissions for Attachments

Civic Platform provides three ways for administrators to set permissions for public users to upload, download, view or delete documents attached with a record, either it be a record attachment which is directly uploaded for the record, or a people attachment which public users upload to the licensed professional account relating to the record. Administrators must define the security policy permissions for EDMS (Electronic Document Management System). Then, permissions can be assigned to document types, which refine or restrict the EDMS permission settings to ACA users. Agency employees may also define permissions for a particular document on an application though document configurations attached to the record. The individual document permission setting performed on the record overrides the document type level permission setting.

For more information about setting up Standard Choices, refer to the *Accela Civic Platform Configuration Reference*. For more information about setting up the EDMS security policy, refer to the “Security Policies” chapter in the *Accela Civic Platform Configuration Reference*.

### Topics

- [Configuring Permissions in EDMS](#)
- [Configuring Permissions for a Document Type](#)
- [Configuring Permissions for a Specific Document](#)

## Configuring Permissions in EDMS

Administrators must configure EDMS (Electronic Document Management System) and its associated security policy to define permissions for the PublicUser module which is specific to ACA and public user functionality. Set the EDMS security policy settings to the maximum level of permissions you want to grant to a public user. After defining the EDMS security policy, you can refine the attachment permissions to view, download, upload, and delete documents at the document type and individual document level.

Administrators must perform Standard Choices configuration for EDMS to enable this feature. EDMS can be implemented in various ways from agency to agency. This section of documentation provides examples of how EDMS can be setup for Citizen Access.

For instructions on how to define permissions at the document type level, see [Configuring Permissions for a Document Type on page 337](#). For instructions on how to define permissions at the individual document level, see [Configuring Permissions for a Specific Document on page 339](#).

### To configure document functions in ACA

1. Search and select **EDMS** from the Standard Choice Name item list.

*Civic Platform displays the Standard Choices Item Edit page for EDMS.*

## 2. Configure Standard Choices Values.

- Configure the Standard Choice Value. For example, **ACCELA**.

Enter the **Value Desc** information.

EDMS\_VENDOR=ACCELA;EDMS\_DOCUMENT\_SIZE\_MAX=512KB

- Configure the Standard Choice Value. For example, **ADS**.

Enter the **Value Desc** information.

EDMS\_VENDOR=ADS;EDMS\_DOCUMENT\_SIZE\_MAX=5000;ADS\_SERVER\_URL=http://10.50.0.36:19080/documentservice/index.cfm;ADS\_SERVER\_SECURITY\_KEY=TESTDEV0012345;ADS\_SERV\_PROV\_CODE=ADS011;ADS\_CLEARANCE\_KEY=FXK9FBPBMQVLWMR3QCO4INSGZXTKD;ADS\_SECURITY\_KEY=F5SSXA6XDFF03VMNU98NCR1X3FGK34;DEFAULT=YES.

## 3. Configure the Security Policy.

For detailed instructions about EDMS security policy configuration, refer to the “Security Policies” chapter in the *Accela Civic Platform Administrator Guide*.

- Go to **Agency Profile** and select **Security Policy** from the drop-down list.
- Click the **EDMS Access Security** hyperlink.
- Click the link of the EDMS server name (**ACCELA** or **ADS**).

*Civic Platform displays the EDMS Security window.*

- Choose the module PublicUser.

Agency, Module or Group Name	Upload	Download	View	Delete	Status	Default	Authentication	Username	Password
FLAGSTAFF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable	<input type="checkbox"/>	None	<input type="text"/>	<input type="text"/>
Building-BuildingAdmin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable	<input type="checkbox"/>	None	<input type="text"/>	<input type="text"/>
Building-BuildingPublicUser	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable	<input checked="" type="checkbox"/>	None	<input type="text"/>	<input type="text"/>
AMS-AMSAadmin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable	<input type="checkbox"/>	None	<input type="text"/>	<input type="text"/>
	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>							

- Mark or clear the check boxes to define the user group permissions to upload, download, view, or delete a document in ACA.
- Set the Authentication to None. You must configure the security policy for anonymous users, or they receive errors.
- Optionally, to enable licensed professionals to upload people attachments to their accounts, and enable public users to view people attachments, choose the Agency module, and repeat the step e and step f.

**Note:** People attachments can only be uploaded to and retrieved from the EDMS server with agency-level security policy settings.

- h. Click the **Save** button.

*If document functions are enabled for a user group, the public user views the **Attachments** section for a permit. Each hyperlink displays for an attachment. The hyperlinks include: Upload a New Attachment, Delete, and the attachment name which opens a pop-up window to open (view) and/or save (download).*

## Configuring Permissions for a Document Type

After you create a document group, you can add document types to the group. The document types that you set up apply to both the electronic and non-electronic documents, and determine how users categorize the documents associated with an application. You must indicate which public users have permissions to view, upload, and delete the document type attachment online. The public user types include: All ACA users (including anonymous users), registered users, Licensed Professionals, Record Creator, Contact, and Owner.

Administrators can specify which licensed professionals can to upload, delete, or view the document type by clicking the License Type button and marking the corresponding check box(es) for specific licensed professional types in the pop-up window. These permissions apply to any document a licensed professional adds to his licensed professional record. These documents display in the Public Documents section as read-only when a public user searches for the license information. If you want to restrict access to a specific document, navigate to the document tab for the record and assign additional permission settings. For instructions on how to restrict access to a specific document, see the “Defining ACA Permissions for a Document” section in the “Attachments” chapter of the *Accela Civic Platform User Guide*.

### To configure the permissions for a document type

1. Choose **Administrator Tools > Attachments > Document**.
2. Search for the document group and the document type that you want to set the permission.

- Click the red dot besides the document type.

Civic Platform displays the Document Type-Edit page.

**Document Type - Edit**

Use this form to edit the Document Type

Document Group * :	INSPECTION
Document Group(Default):	INSPECTION
Document Type * :	Inspection Others
Document Type(Default) * :	Inspection Others
Template:	<input style="width: 150px; height: 20px;" type="button" value="..."/>
Document Status Group:	<input style="width: 150px; height: 20px;" type="button" value="..."/>
Document Review Status Group:	<input style="width: 150px; height: 20px;" type="button" value="..."/>
Download Automatically to Accela Wireless:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Set Permission for ACA:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Title Viewable in ACA:	<input type="checkbox"/> All ACA Users <input type="checkbox"/> Registered ACA Users <input checked="" type="checkbox"/> CAP Creator <input checked="" type="checkbox"/> Licensed Professional <input type="checkbox"/> Contact <input type="checkbox"/> Owner <input style="width: 100px; height: 20px;" type="button" value="License Type"/>
Downloadable in ACA:	<input type="checkbox"/> All ACA Users <input type="checkbox"/> Registered ACA Users <input checked="" type="checkbox"/> CAP Creator <input checked="" type="checkbox"/> Licensed Professional <input type="checkbox"/> Contact <input type="checkbox"/> Owner <input style="width: 100px; height: 20px;" type="button" value="License Type"/>
Uploadable in ACA:	<input type="checkbox"/> All ACA Users <input type="checkbox"/> Registered ACA Users <input checked="" type="checkbox"/> CAP Creator <input checked="" type="checkbox"/> Licensed Professional <input type="checkbox"/> Contact <input type="checkbox"/> Owner <input style="width: 100px; height: 20px;" type="button" value="License Type"/>
Deletable in ACA:	<input type="checkbox"/> All ACA Users <input type="checkbox"/> Registered ACA Users <input checked="" type="checkbox"/> CAP Creator <input checked="" type="checkbox"/> Licensed Professional <input type="checkbox"/> Contact <input type="checkbox"/> Owner <input style="width: 100px; height: 20px;" type="button" value="License Type"/>
Comment:	(4000 char max)

- Select **Yes** in the Set Permission for ACA field to grant permission on documents of this document type to ACA users.
- In the Title Viewable in ACA, Downloadable in ACA, Uploadable in ACA, and Deletable in ACA fields:
  - Mark the check boxes next to the users for which you want to grant permission to view title, download, upload, or delete the documents of this document type.

**Note:** *Users without permission in "Title Viewable in ACA" cannot download or delete the document, even if the downloadable and deletable permissions are granted.*

- If you want to specify the licensed professional types allowed to upload, delete, or view the document type in ACA, click the **Licensed Professional** button and indicate the specific licensed professional types in the pop-up window. Then click the **Select** button.

#### Select License Types

Mark the checkbox to specify type of licensed professional

- All License Professional Types
- ARCHITECT
- Building Office
- Business cards
- CIVIL ENGINEER
- CONTRACTOR
- DEVELOPER
- ELECTRIC
- GENERAL
- Gas/Fuel
- MECHANICAL
- Provider
- Training

**Select**    **Close**

6. Click the **Submit** button.

## Configuring Permissions for a Specific Document

Civic Platform provides a way for users to manage which documents associated with an application are available for public users to view or delete in Citizen Access. This feature offers a way to define permissions at the individual document level. An agency has control to restrict public users from viewing the document or removing it from the application based on the agency decision of the sensitivity or importance of it.

To assign permissions, click the Assign button in the Documents portlet, and mark or clear the associated check box(es) for the public users that have access or restricted access. For example, a picture or signed legal document can be uploaded as supportive evidence to a case. A graphic may be submitted to show the area for a building expansion. An agency can set permissions to allow all ACA users to view the graphic of the area for a building expansion, however may restrict the picture or legal document for a case from access to ACA entirely.

#### To define ACA permissions for a document

1. Select a Record and click the **Document** secondary tab.

*Civic Platform displays the document portlet.*

2. Select a document.

3. Click the **Assign** button.

Civic Platform displays a portlet with viewable permissions for ACA.

The screenshot shows a configuration interface for setting permissions for an attached document type (ACA). It includes three main sections:

- Title Viewable in ACA:** Set Title Viewable Permission:  Yes  No  
User roles: All ACA Users, Registered ACA Users, Record Creator, Licensed Professional, Contact, Owner
- Downloadable in ACA:** Set Downloadable Permission:  Yes  No  
User roles: All ACA Users, Registered ACA Users, Record Creator, Licensed Professional, Contact, Owner
- Deletable in ACA:** Set Deletable Permission:  Yes  No  
User roles: All ACA Users, Registered ACA Users, Record Creator, Licensed Professional, Contact, Owner

4. Complete these fields:

**Set Title Viewable Permission** Click the **Yes** radio button and then select the public users for which you want the attached document name to be viewable in Citizen Access.

Click the **No** radio button to inherit permissions on the document type of the attached document from Civic Platform.

**Set Downloadable Permission** Click the **Yes** radio button and select the public users for which you want the attached document to be downloadable in Citizen Access.

Click the **No** radio button to inherit permissions on the document type of the attached document from Civic Platform.

**Set Deletable Permission** Click the **Yes** radio button and then select the public users for which you want the attached document to be deletable in Citizen Access.

Click **No** radio button to inherit permissions on the document type of the attached document from Civic Platform.

**Note:** *Those users without this permission cannot download or delete the document, even though the downloadable and deletable permissions (described below) are granted.*

*If you set a permission to Yes and do not select any public user groups, you prevent all public users from possessing the permission to the documents. For example, if you set the Set Title Viewable Permission to Yes and do not check any of the check boxes, you prevent all public users from accessing a document even though they may be allowed to access a document based on role-based permissions for the document type.*

5. Click **Submit** button.

## Defining Document Deletion Permissions

Administrators can configure permissions to control the ability to delete a document from a record based on record status. For example, an administrator can allow public users to delete any record that is in an open, or holding status, however, remove the ability to delete a document in a void or closed status. Therefore, when a record is in a status for which a public user has permissions to delete a document, the delete button is available. When the record is in a status for which public users do not have permissions to delete a document, the delete button hides.

To define document deletion parameters, administrators must enable the ability to delete a document or document types in EDMS. See [Defining Public User Permissions for Attachments on page 335](#). Then, administrators combine the Document Delete button with record types and associate it with the available Application Status. You can configure which record types the **Create Document Delete** link displays to public users on an application on the Combine Button with Record Type setting on the Module Settings page. For more information, see [Combine Button with Record Type on page 118](#).

### To configure the document delete button

1. As a pre-requisite, administrators must define documents or document types available to public users in ACA via EDMS configurations. See [Configuring Permissions in EDMS on page 335](#).
2. Navigate to the Module Settings page for a Module.
3. Go to the **Combine Button with Record Type** area and choose **Create Document Delete** from the drop-down list.

*ACA Admin displays Available Record Types, Selected Record Types, and Application Status.*

4. Associate record types to the delete button.

- a. Add Record Types by selecting one from the Available Record Types list and clicking the Add button.
- b. Remove Record Types by selecting one from the Selected Record Types list and clicking the Remove button.

*ACA Admin displays the Selected Record Types in alphabetical order.*

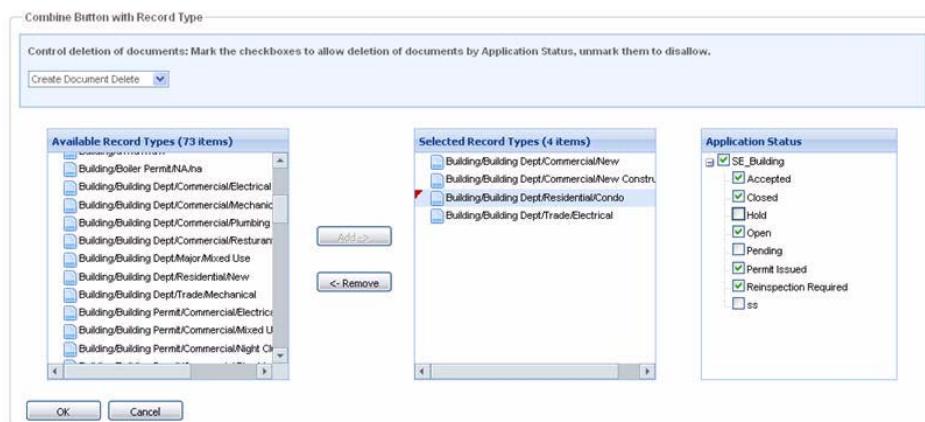
5. Define permissions for when a public user can delete a document based on application status.

- a. Choose a record type from the Selected Record Types list.

*ACA Admin displays the available Application Status associated with the record type.*

- b. Mark the check box(es) associated with the application status that you want to enable permissions to delete a document. Clear the check box(es) with the application status that you want to restrict permissions to delete a document.

*ACA Admin displays a red mark next to record types with modifications to permissions.*



- c. Click OK.

## Adding the Attachment Section to Page Flows

System administrators can configure Citizen Access so that public users can attach documents or files to an application intake form. See the Attachment section in [Figure 96: Attachment Section In Page Flow](#). For example, a film producer who needs various permits to film a movie a city can submit documentation supporting the type of filming they do, graphics of which streets or buildings they need access to, and documents with the dates and duration of the project.

This feature is supported with multiple agency administration, which means that parent agencies and child agencies can apply the Attachment component to the page flow for their application intake processes. Associated agencies will have access to view attachments with the application.

System administrators must define the EDMS (Electronic Document Management System) security policy and configure document type permission settings to control who can view, download, upload, or delete attachments. When an attachment relates to a partial application in Citizen Access, the application server (av.biz) saves it. When the partial application is converted

to a completed application, all associated documents are uploaded to the EDMS server. As a result, a system delay may occur when trying to view attachments in the Attachment List on the Record Detail page during the conversion process. Delays can be as long as 60 minutes. This feature supports the Standard EDMS server, but does not support ADS (Accela Document Service).

Configurations for adding the attachment section with the application intake form takes place in the Page Flow Configuration area for each module in Citizen Access Setup. If your agency requires it, administrators must update scripts associated with this feature. Sample scripts are available via the Accela Delivery team.

This feature requires additional configurations in Civic Platform in order for successful implementation. System administrators must pre-define document groups with acceptable document types for your agency. Then, administrators must assign the document group code to the document code for ACA for each application type enabled for Citizen Access. For more information about documentation configurations in Civic Platform, see “Establishing Document Groups” in the “Plan Review” chapter of the *Accela Civic Platform Administrator Guide*.

**Figure 96: Attachment Section In Page Flow**

The screenshot shows the Accela Citizen Access interface. At the top, there's a blue header bar with 'ON-LINE SERVICES' and a logo. Below it, the main navigation bar includes 'Home', 'Trade Name', 'Service Request', 'Building' (which is highlighted in yellow), 'Services', and 'Template'. There are also links for 'Create an Application', 'Obtain a Fee Estimate', and 'Search Applications'. A user is logged in as 'vera zhao'. The main content area shows a 'Building/ACA/Renewal' page flow with steps numbered 1 through 7. Step 2 is currently selected. Below the steps, a breadcrumb trail reads 'Step 2: Step 2 > Page 1'. A large grey box labeled 'Attachment' contains the 'Attachment List' section, which shows a single file named 'admap.jpg' with a size of 449.43 KB, a date of 01/21/2009, and a 'Delete' link. Below this is a section titled 'Upload a New Attachment' with a dropdown arrow. Further down is the 'Attachment Details' section, which includes fields for 'File:' (with a 'Browse' button) and 'Description:' (with a text area and an 'Attach File >' button). At the bottom of the form are two buttons: 'Continue Application >' and 'Save and resume later: [checkbox]'. The entire interface has a clean, modern design with a white background and light blue accents.

#### To add attachment section to the page flow

1. Navigate to **Module Settings > Page Flow Configuration**.
2. Add the Attachment Component to one or more page flows for a module.

The screenshot shows the 'Consumer Complaints Page Flow Configuration' page. At the top, there's a dropdown for selecting an existing Page Flow, a link to 'Create a new Page Flow', and a note that 0 Record types are associated with the selected Page Flow. Below this is a 'License Link' section with two components: 'Applicant' and 'PIN Code Entry'. The 'Applicant' component has a sub-component 'ASI Table (LICENSE LINK)'. In the 'Step 2' section, under 'Page 1', there are two components: 'Detail Information' and 'Attachment'. A red arrow points from the 'Attachment' component here to the 'Attachment' component listed in the 'Component Settings' sidebar. The 'Component Settings' sidebar lists various components like Address, Parcel, Owner, Assets, Licensed Professional List, Applicant, Contact 1, Contact 2, Contact 3, Contact List, Additional Information, ASI, ASI Table, Attachment, Education, Continuing Education, Examination, Valuation Calculator, and Custom Component.

3. If necessary, customize your attachment heading.
  - a. Click the **Attachment** component heading and go to the Component Settings area.
  - b. Enter the new heading in the Custom Heading Value cell.
4. Go to the **Attachment** section on the **Module Information** page for customizing.

- a. If applicable, customize column headings.
- b. Set the **Description** field to be visible/invisible or required/not required in the field properties area.

The screenshot shows the 'Building CAP Detail' application. On the left, there's a 'Detail Information' panel with fields for 'Application Name', 'General Description', and 'Detailed Description'. Below it is an 'Attachment' panel containing an 'Attachment List' table and a 'File' upload section. A red arrow originates from the 'Description' input field in the 'Attachment Details' section and points towards a 'Field Properties' window on the right. The 'Field Properties' window has columns for 'Name' and 'Value', showing entries for 'Default Label', 'Field Label/Default Lang', 'Field Label', and 'Instructions'.

5. Update the applicable sample scripts for your agency provided by the Accela Delivery team.

**Note:** Trained administrators must rewrite sample scripts in collaboration with an Accela Delivery team member. Improperly written scripts can seriously damage your system by incorrectly altering or deleting data for many records. For information on writing scripts and using the Event Manager and Script Engine, see the Civic Platform Scripting Guide.

- If the payment provider is Etisalat payment, update the OnlinePaymentPost event with a script to copy the attachment from a partial application to a submitted application. Modify this sample script: FinishOnlinePayment4TransferDoc.
- If the attachment is for the auto-renew process, update PaymentReceiveAfter event with a script to copy an attachment from a child application to the parent application. Modify the sample script: PaymentReceiveAfter4RenewTransferDoc.
- If the attachment is for the manual renew, update WorkflowTaskUpdateAfter event with a script to copy the attachment from a child application to the parent application. Modify the sample script: WorkflowTaskUpdateAfter4Renew4TransferDoc4AbuDhabi.

6. Verify the permissions to upload, download, delete, and view attachments are accurate for the various public user roles. Define permissions in the EDMS Security policy, document

and document type permission configurations. For more information about permissions, refer to [Defining Public User Permissions for Attachments on page 335](#).

## Populating People Template Fields Using EMSE

You can configure a licensed professional people template to allow public users to select options from a drop-down list populated from configurations between Civic Platform and an external web service, then published to the people template field. This is accomplished through EMSE (Event Manager and Script Engine) and available in the application intake process where people template fields are available, such as a contractor section.

This feature is particularly useful for agencies that require the most current information about State or County requirements in the drop-down list. For example, in Salt Lake County, every electrical contractor must have a signing supervisor associated with the electrical license application. When this feature is enabled, an electrical contractor can apply for an electrical license in the city of Sugarhouse and select the most current supervisor names in Salt Lake County. Civic Platform calls the Salt Lake County web service using an EMSE script to gather the supervisor name data, then pre-loads this data in a Supervisor field in the licensed professional form for contractor selection online.

For more information, see “Populating Licensed Professional Template Fields Using EMSE” in the “People” chapter in the *Accela Civic Platform Administrator Guide*.

## Enabling Auto-fill for City and State Fields

This feature allows administrators to enable or disable the auto-fill function for the City and State fields. For example, when the City or State auto-fill is disabled, Citizen Access displays blank information in the fields so public users can enter their own City and State information. When the City and State auto-fill feature is enabled, information extracted from the agency profile automatically populates the City and State information. Administrators can enable auto-fill of the State field and disable the City information about public user data entry. The auto-fill feature is disabled by default for both fields.

Administrators can enable or disable the auto-fill of City and State fields individually in the field property area for each address form.

**Note:** *This feature also applies to general areas of Citizen Access, such as entering registration information, performing an APO, provider, education, or licensee search, and entering information about the shopping cart.*

### To enable auto-fill for city and state fields

1. Navigate to the module that you want to apply the auto-fill functionality.
2. Go to a web page with address information. For example, the Enter Work Location page.

3. Click to select the City or State field to apply auto-fill.

Citizen Access displays the *Field Property Area* for the field.

The screenshot shows the 'Planning Enter Work Location' page. On the left, there's a search bar with placeholder text 'Please search and select one work location to see available services.' Below it is a form titled 'Enter Work Location' with fields for Street No, Direction, Street Name, Street Type, Unit Type, Unit No, City, State, and Zip. There are 'Search' and 'Clear' buttons at the bottom. On the right, a 'Field Properties' panel is open, listing configuration options:

Name	Value
Default Label	State:
Field Label(Default Lang...)	State:
Field Label	State:
Instructions	
State Options	Click to configure
Enable Auto-fill	false

4. In the **Enable Auto-fill** value cell, set the auto-fill functionality for the field.
  - To enable auto-fill, choose **true**.
  - To disable auto-fill, choose **false**.
5. Click the **Save** button.

## Configuring Record Types in Classic Administration

An application type is a central component for creating a successful ACA site. It is the main source used to gather application information, dictate Page Flow, and organize the processes surrounding inspections, fees, and workflow.

This section provides ACA specific configurations that take place on the Application Category Edit page in Civic Platform. See [Figure 97: Application Category/Type Page](#).

**Figure 97: Application Category/Type Page**

Application Category - Edit

Use this form to edit Application Category.

**Would you like this permit to be available through VelocityHall? \***  Yes  No  
 Enable Renewal  Also Enable Issuance  
Renewal CAP Type \* : Building/Inspection/Electricity/Wire

Group: Building  
Type: ACA  
Subtype: Electricity  
Category \* : alice (Cannot edit; Application already created with this category name)

Application Type Alias:

Status:  Enable  Disable  
 Searchable

Fee Schedule \* : AG\_CPLCID

Application Type Icon:

Enforcement Type:

Inspection Group Name: Security

Workflow \* : AG\_CMPLNT

Application Specific Info Group Code: APCD\_52B\_A

SmartChoice Group Code \* : AGIS

Page Flow Code For ACA: Residential New

eMail For Hearing Notification:

Expiration Code: NONE

Application Key Mask \* : Default [Application Key Mask Definition](#)

ID Mask: Default [ID Mask Definition](#)

Partial ID Mask \* : Default [Partial ID Mask Definition](#)

Temporary ID Mask \* : Default [Temporary ID Mask Definition](#)

Document Code: GEN APCD-General-Application

Document Code For ACA: CAROL

Application Status Group Code: PD\_HALF

Default CAP Status:

Address Type Group Code:

Copy all associated APO:

Duration (Days):

Use these settings to associate an Edit Layer to this Application Category:

GIS Service:

Edit Layer:

Unit of Production:

Default Production Unit: 0  Value Required To Close

Estimated Cost Per Production Unit:

IVR NUMBER: 11

Virtual Folder Group:

## Topics

- [Enabling Applications](#)
- [Managing the Alias Field for Record Types](#)
- [Setting the Default Status for Application Type](#)

## Enabling Applications

You must determine which modules and application types, such as the building residential permits from Building Module, you want to make available to public users. It is at the application

type level you enable the record type to ACA and define if you want a user to be able to auto-issue the record after an application is complete. You also configure the renewal details at the application type level if you want public users to renew records online. For details on setting an FID, refer to the *Accela Civic Platform Configuration Reference*.

#### To enable an application type for ACA

1. Log in to Civic Platform.
2. Verify that the appropriate FIDs are enabled for the feature.
  - a. Enable **FID 0065 Admin Application Types** to display the **Enable for ACA** check boxes.
  - b. Enable **FID 8398 Cap Renewal** to enable ACA users to renew a record.
  - c. Disable **FID 0075** to hide Velocity Hall fields.
3. Navigate to **Admin Tools > Application > Application Type**.  
*Civic Platform displays the Application Type tree.*
4. Select an existing **Application Type** from the tree and click **Edit**.  
*Civic Platform displays the Application-Edit page*
5. Go to the **Enable for ACA?** section of the Application-Edit page. Mark the applicable check boxes as described below.
  - a. Mark the **Enable Application** check box to expose the application type and its associated alias to ACA.
  - b. Mark the **check box for Also Enable Issuance** (next to Enable Application), if you want to issue the license record to the user when the fees are paid via ACA.



The screenshot shows the 'Application Category - Edit' form. At the top, it says 'Use this form to edit Application Category.' Below that is a section titled 'Enable for ACA?'. It contains several checkboxes:

- Enable Application
- Also Enable Issuance
- Enable Renewal
- Also Enable Issuance
- Renewal CAP Type\*: AMSIAMS41/AAMS41/AAMS41
- Enable Fee Estimation

Below this section, there are some descriptive labels: 'Group: Building', 'Type: Building Permit', 'Subtype: Residential', and 'Category: \* New (Can not Edit, Application already created with the category name)'. At the bottom, there is a field labeled 'Application Type Alias:'.

## Managing the Alias Field for Record Types

An alias helps to make the names of records easier to understand. For example, your agency may name professional journeyman electrician licenses LICPRO1111 or a permit for utility work might be PWU23-98. These names might be useful internally, but they do not clearly identify the purpose of the license or permit for a person who does not use Civic Platform regularly.

There are two parts to creating an alias. You must expose the alias field, which is an indication to Civic Platform that you want to use the alias instead of the internal name for the application or license. Then, within the application type, you define the alias.

In order for this feature to function properly, you must configure the related Standard Choice and disable the applicable Function Identification (FID) numbers as described in this section.

### Topics

- [Exposing the Alias Field for Record Types](#)
- [Enabling Application Type Alias](#)

## Exposing the Alias Field for Record Types

When an application type is enabled for Citizen Access, you can also apply an alias, or custom name, to it. This feature requires Standard Choices configuration. For detailed information on Standard Choice setup, refer to the *Accela Civic Platform Configuration Reference*.

### To expose the alias field to Record types

1. Navigate to **Admin Tools > Application > Standard Choices**.
2. Configure the Standard Choice: **ENABLE\_CAP\_TYPE\_ALIAS**.
3. Set the Standard Choice Values: **Yes** displays the Alias field in the Application Type-Edit Screen.

## Enabling Application Type Alias

You can define a custom name for an application type that displays for public users. You must first determine which application types you want to make available to public users. If you want to have online permits, you must make the permit module available to Citizen Access. Then, you enable the application type for ACA and define the custom name.

For agencies upgrading from an older version to a higher version of Civic Platform, it is possible that VelocityHall application type alias fields may display on the Application Category -Edit page. If this occurs, you must disable and enable the associated Function Identification (FID) numbers to display the Application Type Alias field for this feature on the Application Type page in Civic Platform.

### To give an application type an alias

1. Navigate to **Admin Tools > User Groups**.
2. Verify that the appropriate FIDs are enabled or disabled for the feature.
  - a. Disable **FID 0075 Admin License Types** to hide the Velocity Hall fields.
  - b. Enable **FID 0065 Admin Application Types**.
3. Navigate to **Admin Tools > Application > Application Type**.  
*Civic Platform displays the Application Type tree.*

4. Select an existing **Application Type** from the tree and click **Edit**.

*Civic Platform displays the Application-Edit page.*

The screenshot shows the 'Application Category - Edit' form. At the top, it says 'Use this form to edit Application Category.' Below that is a section titled 'Enable For ACA?' which contains several checkboxes:

- Enable Application  Also Enable Issuance
- Enable Renewal  Also Enable Issuance
- Renewal CAP Type:
- Enable Fee Estimation

Below this section, there are other fields: Group: Building, Type: Building Permit, Subtype: Residential, Category: New (Can not Edit, Application already created with the category name), and Application Type Alias: [empty input field]. The 'Enable For ACA?' section and the 'Application Type Alias' field are both highlighted with a thick red border.

5. Mark the **Enable for ACA? - Enable Application** check box.
6. Enter the alias, or custom, name for the application in the **Application Type Alias** field.
7. Complete or update any other fields as needed.
8. Click the **Save** button.

## Setting the Default Status for Application Type

Administrator needs to define a default status for records when it is submitted to the system via Citizen Access. This setting is configurable for each application type. For example, when an application is received via ACA, it may have the status of 'Pending' which may limit or restrict the ability for the user to schedule inspections, but provide access to view the application. When the status changes to 'Approved', then users have ability to schedule an inspection.

### To set the default status for an application type

1. Log in to Civic Platform.
2. Navigate to **Admin Tools > Application > Application Type**.  
*Civic Platform displays the Application Type pop-up window.*
3. Select the application type from the tree and click the **Edit** button.  
*Civic Platform displays the Application Category Edit page.*
4. Verify the application type is enabled for ACA. If it is not, mark the **Enable for ACA?** check box to enable it.

5. Select the appropriate status group code from the **Application Status Group Code** drop-down list.

Civic Platform displays the *Application Type Default Status Field*.

The screenshot shows a form with several dropdown menus. At the top, 'Temporary ID Mask \*' is set to 'Default' with a link to 'Temporary ID Mask Definition'. Below it, 'Document Code' is set to 'GEN' with a value of 'APCD-General-Application'. 'Document Code For ACA' is set to 'CAROL'. The 'Application Status Group Code' dropdown is highlighted with a red box and contains 'PD\_HALF'. Other dropdowns include 'Default CAP Status', 'Address Type Group Code', 'Copy all associated APO', and 'Duration (Days)'.

6. Select the appropriate default permit status from the **Default Record Status** drop-down list.
7. Click the **Save** button.

## Enabling Citizens to Edit Records

Agency staff can request updates to records that were submitted with erroneous or missing information. Citizens have the ability to edit those records in Citizen Access when an administrator enables the functionality as described below.

### Proceed as follows to enable this functionality

1. Enable full access to FID 8507-Edit Record in ACA - 7.3.3.5.0.
2. Configure the application type for which you want citizens to have edit permissions.
3. Customize the email notifications that display when a user clicks Request Update on a record in Civic Platform, and when a citizen completes the required updates.

### Topics

- Enabling FID 8507
- Configuring the Application Type
- Customizing the Notification Templates
- Requesting an Update to a Record

## Enabling FID 8507

1. Log in to Civic Platform Classic Admin.
2. Go to **Admin Tools > User Profile > User Group**.
3. Select the user group for which you want to enable the FID.
4. Select the module and click **Submit**.
5. Locate the FID and select Full Access.

6. Click **Save**.

## Configuring the Application Type

1. Log in to Civic Platform Classic Administration.
2. Go to **Admin Tools > Application > Application Type**.
3. Navigate to the application type for which you want citizens to have edit permissions.
4. Click **Edit**.

*Civic Platform displays the Application Category—Edit window.*

The screenshot shows the 'Application Category—Edit' window with various configuration fields:

- Application Key Mask \***: Default (dropdown) | [Application Key Mask Definition](#)
- ID Mask**: Default (dropdown) | [ID Mask Definition](#)
- Partial ID Mask \***: Default (dropdown) | [Partial ID Mask Definition](#)
- Temporary ID Mask \***: Default (dropdown) | [Temporary ID Mask Definition](#)
- Receipt Number Scheme**: (dropdown) | [Receipt Number Definition](#)
- Document Code**: (dropdown) | (dropdown)
- Document Code For ACA**: (dropdown)
- Required Document Types**: [Configure](#)
- Application Status Group Code**: TEMPLATE (dropdown)
- Default CAP Status**: Void (dropdown)
- Post Submission Updates in ACA**: [Configure](#) (highlighted with a red box)
- Address Type Group Code**: (dropdown)
- Copy all associated APO**: (dropdown)
- Duration (Days)**: (text input)

5. Select the Application Status Group Code that contains the Default CAP Status you want to configure.
6. Select the Default CAP Status. When the record is in this status, it will become editable according to your configuration in the next step.
7. In the Post Submission Updates in ACA area, click **Configure**.

*Civic Platform displays the Post Submission Update in ACA window.*

**Post Submission Update in ACA**

**Submit    Reset    Cancel    Help**

Agency staff can request and allow citizen to update a submitted application in Citizen Access if required. This update can be allowed for specific record types in the specific status(es) and for specific components.

Select the "Record Type Status" and "Editable Components in Citizen Access" to allow updating this record type by the citizens.

Record Type Status:	ACA Editable Components
<input checked="" type="checkbox"/> Void	<input type="checkbox"/> App Specific Info <input type="checkbox"/> App Specific Info Table <input type="checkbox"/> Address <input checked="" type="checkbox"/> Contact <input checked="" type="checkbox"/> Licensed Professionals

8. Choose the Record Type Status and ACA Editable Components. For applications that have the record type status you specify, citizens will be able to edit the components you specify.

**Note:** *Attachments and condition documents are not configurable here, as they are editable by default and cannot be changed.*

9. Click **Submit**.

## Customizing the Notification Templates

1. Log in to Civic Platform.
2. Navigate to **V360 Admin > Communication Manager > Notification Templates**.
3. Search for the notification template you want to customize. The new notification templates you must customize to fully implement this feature are:
  - **UPDATE INFORMATION BY CITIZEN ON RECORD NOTIFICATION**  
Use this notification template to email a citizen requesting an update to a record. This notification is triggered when an agency user opens a record, clicks the Record tab, then clicks Menu > Request Update.  
You can include a deep link to the record or you can instruct the citizen to locate the record that needs to be updated in the record list in Citizen Access. For instructions on creating deep links, see [Configuring a Deep Link for a Regular Agency](#).  
The record that requires an update displays with an Edit link the citizen can click to edit the record.
  - **RECEIVED UPDATE ON RECORD NOTIFICATION**

Use this notification template to notify agency staff when the citizen completes the updates to the record.

You can configure the EMSE event ApplicationSubmitBefore to send this notification template when a citizen clicks Submit Updated Information on a record in Citizen Access.

4. Click **Help** for complete instructions and a list of variables you can use to customize the content of these notification templates.
5. Modify the General Details, Email Content, and SMS Content tabs as appropriate.
6. Click **Save**.

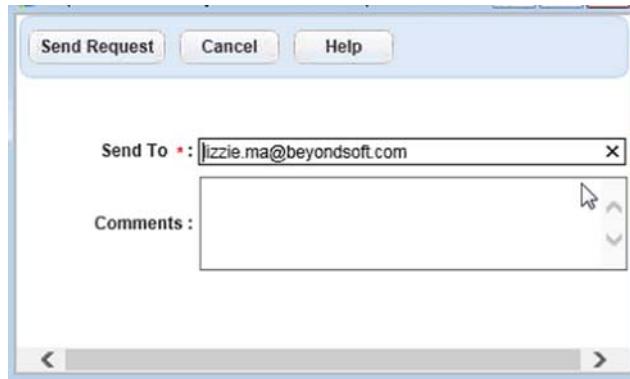
## Requesting an Update to a Record

After a citizen submits an application in Citizen Access, if the application is missing information or needs to be updated, you can request an update to the record, as follows:

1. Log in to Civic Platform.
2. Navigate to a record that is missing information or needs to be updated.
3. On the Record tab, choose **Menu > Request Update**.

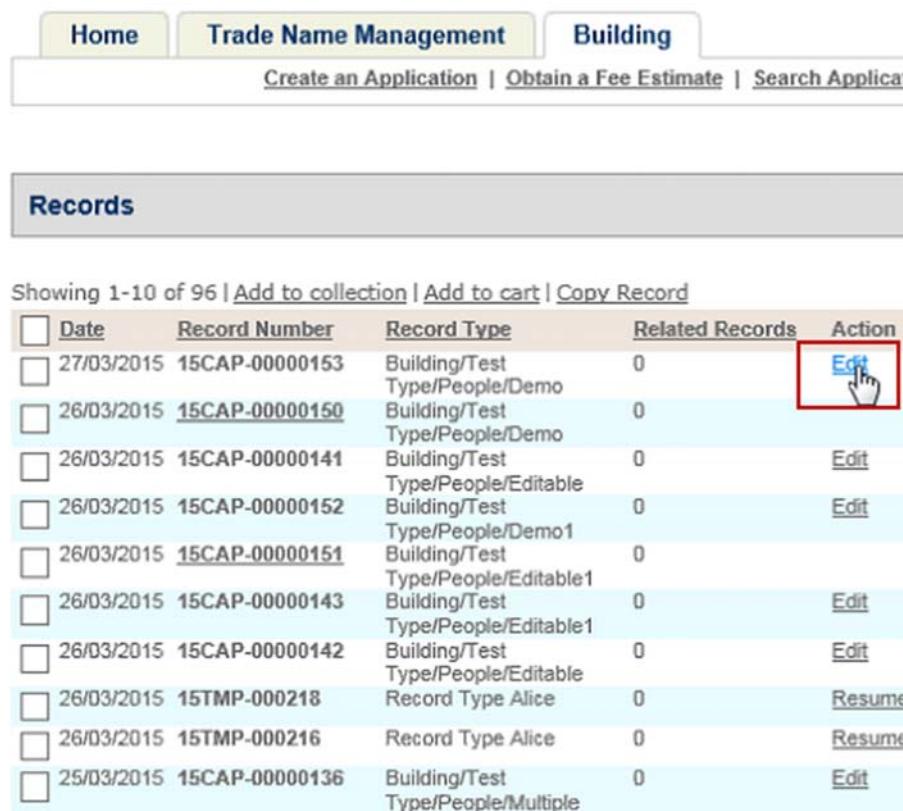
**Note:** *The Request Update button only displays when FID 8507 is enabled, and when the record type status matches your configuration in Admin Tools > Application > Application Type, described above.*

Civic Platform displays the Request Update window.



4. Include any additional comments to send to the citizen.
5. Click **Send Request**.
6. The citizen receives an email notification with a deep link to the record or instructions on how to access the record, based on how you customize the notification template. See [Customizing the Notification Templates on page 354](#).

The citizen can click Edit on the record to begin editing it, provided they are the record creator. Only the record creator can edit the record.



<input type="checkbox"/>	Date	Record Number	Record Type	Related Records	Action
<input type="checkbox"/>	27/03/2015	<a href="#">15CAP-00000153</a>	Building/Test Type/People/Demo	0	<a href="#">Edit</a>
<input type="checkbox"/>	26/03/2015	<a href="#">15CAP-00000150</a>	Building/Test Type/People/Demo	0	<a href="#">Edit</a>
<input type="checkbox"/>	26/03/2015	<a href="#">15CAP-00000141</a>	Building/Test Type/People/Editable	0	<a href="#">Edit</a>
<input type="checkbox"/>	26/03/2015	<a href="#">15CAP-00000152</a>	Building/Test Type/People/Demo1	0	<a href="#">Edit</a>
<input type="checkbox"/>	26/03/2015	<a href="#">15CAP-00000151</a>	Building/Test Type/People/Editable1	0	<a href="#">Edit</a>
<input type="checkbox"/>	26/03/2015	<a href="#">15CAP-00000143</a>	Building/Test Type/People/Editable1	0	<a href="#">Edit</a>
<input type="checkbox"/>	26/03/2015	<a href="#">15CAP-00000142</a>	Building/Test Type/People/Editable	0	<a href="#">Edit</a>
<input type="checkbox"/>	26/03/2015	<a href="#">15TMP-000218</a>	Record Type Alice	0	<a href="#">Resume</a>
<input type="checkbox"/>	26/03/2015	<a href="#">15TMP-000216</a>	Record Type Alice	0	<a href="#">Resume</a>
<input type="checkbox"/>	25/03/2015	<a href="#">15CAP-00000136</a>	Building/Test Type/People/Multiple	0	<a href="#">Edit</a>

7. The citizen can only edit the components of the record that you specified as editable in [Configuring the Application Type](#).

Notes:

- Attachments and condition documents are always editable, regardless of this configuration.
- This feature does not support Save and Resume Later.
- Any associated Address, Parcel, Owner information changes if the citizen updates that information.

When the citizen finishes updating the required information, they can click **Submit Updated Information**.

Continuing Education List					
Showing 1-6 of 6					
Continuing Education Name	Required	Provider Name	Provider Number	Class	
t	No	cc	002	c	
t	No	test	001	c	
t	No	test	001	c	
t	No	test	002	c	
	No	math	123456	match	
	No	new	123456	new	



This triggers the EMSE event ApplicationSubmitBefore. You can configure this event to send the notification template RECEIVED UPDATE ON RECORD NOTIFICATION to the agency user and to create an activity that displays on the Activity tab of a record. Refer to the *Accela Civic Platform Scripting Guide* for more information on EMSE functionality.

## CHAPTER 15:

# FEES AND ONLINE PAYMENTS

Agencies can use Citizen Access to collect fees that relate to records online. This feature enables public users to access their records, view the associated fees, group records together in a shopping cart, and pay for the fees in the cart from their computer. The implementation of online payment processing allows public users to use a credit card or a debit card to pay for the associated fees online. To set up online payment processing, contact Accela Customer Support or your Accela Delivery Team specialist.

You can also use fees and online payments to provide fee estimations on applications or licenses through partial applications. Fee estimation is useful when public users want to inform themselves of the estimated costs relating to a business license or a building permit.

In the case that your agency wants to offer estimations, but do not want online payment functionality, you can remove pay links from web pages so that during the application process, public users avoid the payment pages. Together, the fees and online payment functionality provides a way to become an online government merchant. The people whom you serve can easily manage their permits and business licenses and pay for the fees to your agency from home or office.

**Note:** *To set up fees and online payments, refer to the questions and tasks [Setting Up Fees on page 213](#). The questions help you assess which features you want to make available to the public.*  
*For a comprehensive configuration list for fees and online payment functionality, see [Configuring Required Online Fee Settings](#) in this guide, and the “Fee Setup” chapter in the Civic Platform Administrator Guide.*  
*To implement Accela CivicPay or a third-party payment processor, download the ePayments SDK Development Guide and the ePay SDK.zip file from Success Community. The ePay SDK.zip file includes all of the scripts and web services needed for configuring an ePayment adapter.*

When public users pay for record fees online, the payment processing service fees vary depending on what module the records come from and what payment gateway your agency is using. You can assign one service fee structure for each module by configuring the PAYMENT\_GROUP Standard Choice in Civic Platform. This Standard Choice provides the flexibility to use one service fee structure for one module and to use another service fee structure for another module. For information on configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

**Note:** Currently only the OPC CoBrand Plus payment gateway supports different service fee structures for different modules. For other payment gateways, they only support one service fee structure for all modules; the configuration on the PAYMENT\_GROUP Standard Choice does not work for them.

## Topics

- Introducing Accela CivicPay
- Enabling Fees for Online Functionality
- Enabling Partial Payment Options in Citizen Access
- Defining the Default Qty with Fee Indicators
- Enabling Fee Estimation
- Customizing Fee Pages
- Enabling Payment Methods
- Removing the Pay Fees Link
- Configuring Shopping Cart
- Online Payment Processing
- Trust Accounts
- Assigning Service Fee Structures to Modules

## Introducing Accela CivicPay

Accela CivicPay is a modern, intuitive and secure payment platform designed specifically for the unique requirements of government agencies. Citizens can make check, credit card and ACH payments online and agencies can reconcile payments in real time. Industry-leading data security and PCI compliance protect sensitive information.

For more information about CivicPay talk to your account manager today. Accela's Delivery team is available to implement CivicPay in your environment -- or you can do it yourself using the procedures detailed in the *ePayments SDK Guide*. To get started with the do-it-yourself approach, download the *ePayments SDK Guide* and the ePay SDK.zip file from Success Community. The ePay SDK.zip file includes all of the scripts and web services needed for configuring an ePayment adapter.

## Enabling Fees for Online Functionality

Public users can pay for fees online when a fee-item is attached to an invoice and displayed to them in ACA. Fee items require specific configurations targeted for display and functionality in ACA. This section provides you with those specific configurations. You can also set functionality so fees are automatically invoiced with online applications by setting the fee item to automatically invoice in Civic Platform. This is important because when a fee is automatically invoiced, it removes the step in Civic Platform that is required to manually attach the fee to an

invoice. Some agencies like to implement auto-invoice and assess fees using scripts or fee indicators. For more information on this type of fee setup, contact your Accela implementation specialist, a system administrator who has received training from an Accela implementation specialist, or a product manager. Improperly written scripts can seriously damage your system by incorrectly altering or deleting data for many records.

For additional information on writing and implementing scripts, see the “Writing Scripts” chapter and the “Event Manager and Script Engine” chapter in the *Accela Civic Platform Scripting Guide*.

#### To automatically invoice a fee item

1. Go to Civic Platform and click the **Admin Tools** tab.
2. Choose **Fees > Fee Items**.

3. Search and select the fee item that you want to auto invoice.

*Civic Platform displays the Fee Item Edit page.*

The screenshot shows the 'Fee Item - Add' form. At the top, it says 'Fee Item - Add' and 'Use this form to add Fee Item.' Below are various input fields:

- Fee Item Code\***: [Input Field]
- Fee Schedule\***: [Dropdown] 02197
- Version\***: [Dropdown] VERSION 2
- Fee Description**: [Input Field]
- Comment**: [Text Area] (max 2000 char)
- Unit**: [Dropdown]
- Calc Formula**: [Dropdown] LINEAR\_WITH\_MIN\_MAX
- Calc Variable**: [Input Field]
- Default Value**: [Input Field]
- Round Fee Item**: [Radio Buttons]
  - Y
  - N
  - Round Up
  - Round Down
  - Round to nearest
- Required**: [Radio Buttons]
  - Y
  - N
- Auto Invoiced**: [Radio Buttons]
  - Y
  - N
- Auto Assess**: [Radio Buttons]
  - Y
  - N
- Quantity**: [Input Field]
- Priority**: [Input Field]
- Calculated**: [Radio Buttons]
  - Y
  - N
- Calculation Record#**: [Input Field] [Select]
- Minimum**: [Input Field]
- Maximum**: [Input Field]
- Seq for Calculation**: [Input Field]
- Display Order**: [Input Field]
- Display in ACA**: [Radio Buttons]
  - Y
  - N
  - Read-only
- Required in ACA**: [Radio Buttons]
  - Y
  - N
- Assess Adjustment on Recalculation**: [Radio Buttons]
  - Y
  - N
- Adjustment Credits Allowed**: [Radio Buttons]
  - Y
  - N
- Status**: [Radio Buttons]
  - Enable
  - Disable
- Payment Period\***: [Dropdown] FINAL
- Sub Group**: [Input Field]
- Account Code**: [Input Field] 1  
[Input Field] 2  
[Input Field] 3

At the bottom are 'Save' and 'Cancel' buttons.

4. Indicate your auto invoice option.

- Mark the **Y** option next to **Auto Invoiced** if you want to auto-invoice your fees in ACA.
- Mark the **N** option next to **Auto Invoiced** if you do not want to auto-invoice fees in ACA.

5. Indicate how you want the fee to display on the Fee Estimate page and Fees page online.

- Mark the **Y** option for **Display in ACA** if you want to display the fee item, and then make the quantity field editable for public users.
- Mark the **N** option for **Display in ACA** if you do not want to display the fee item in ACA.

- Mark the read-only option for **Display in ACA** if you want the Quantity field set for read-only to public users.
6. Indicate if you require public users' input in the quantity field. This field becomes active when you set the Display in ACA field to Y or Read-only.
- Mark the Y option to require a numeric value larger than zero in the quantity field.
  - Mark the N option to remove restrictions on data input in the quantity field.
7. Click the **Save** button.

*Citizen Access reflects the fee-item configuration settings on the Fees page or the Fee Estimation page online to public users. The example below displays read-only fees.*

**ePermit**

1 General Info   2 Services   3 Review   4 Pay Fees   5 Work Authorization

**Step 4: Pay Fees**

Listed below are fees based upon the information you have entered. The fees shown include all applicable surcharges or local fees.

**Application Fees**

PORTLAND		\$600.32
Fees	Oty.	Amount
Building ePermit Electrical 1&2 Family Alteration		\$600.32
Stand-alone limited energy, residential	4	\$324.00
Branch circuits with service or feeder each circuit	11	\$110.00
Branch circuits without service or feeder	1	\$92.00
Branch circuits each additional circuit without service	1	\$10.00
State surcharge (12% of permit total)	1	\$64.32

**TOTAL FEES**

Note: This does not include additional inspection fees which may be assessed later.

\$600.32

## Enabling Partial Payment Options in Citizen Access

Citizen Access enables agencies to accept partial payments for fees and includes a new Pay Later option in the Shopping Cart.

Some typical use case scenarios for this functionality include:

- Multiple licensed professionals working on the same project need the ability to pay their portion of a single invoice by selecting and paying only for the fee items they are responsible for. This is a typical scenario for commercial building permits where multiple parties are involved. In the most common use case, the contractor will submit the application and pay the application fees before the plan review process. Subsequently, the architect and professional engineer will pay the plan review fees before the permit is issued. After issuance, contractors and sub-contractors pay the various inspection fees applicable for their area of responsibility.
- A citizen wants to pay specific fee items immediately to avoid fines and penalties, and may have more leeway for paying other fees later. In addition, citizens require the convenience of paying fees online 24/7, without the hassle of mailing a check or driving to the agency to make payments.

- Some agencies prefer to collect a steady stream of revenue and will accept partial payments to avoid the delays that can occur when full payment is required.

### Topics

- Configuring Partial Payment Functionality
- Performing a Partial Payment in Citizen Access
- If You Have Disabled the Shopping Cart
- Anonymous Users

## Configuring Partial Payment Functionality

To configure Partial Payment functionality in Citizen Access, set the Pay Later in ACA option to Y. When Y is selected, the Pay Later link appears; when N is selected, the Fee Item is required and the Pay Later link does not appear.

Figure 98: Fee Item Setup in Classic Administration

**Fee Item - Edit**

Use this form to edit Fee Item.

**Fee Item Code \***: BLD\_RES02  
**Fee Schedule \***: BLD\_RES\_NEW  
**Version \***: 1

**Fee Description:** Fee 02

**Comment:**  
(max 2000 char)

**Unit:** Dollar Amt

**Calc Formula:** CONSTANT

**Calc Variable:** 5

**Default Value:** 1

**Fee Indicator (Qty.):**

**Calculation Record#:**

**Minimum:**

**Maximum:**

**Seq for Calculation:** 20

**Display Order:** 20

**Display in ACA:**  Y  N  Read-only

**Pay Later in ACA:**  Y  N

**Required in ACA:**  Y  N

**Refundable in ACA:**  Y  N

**Assess Adjustment on Recalculation:**  Y  N

**Adjustment Credits Allowed:**  Y  N

## Performing a Partial Payment in Citizen Access

Citizens can selectively pay fees in Citizen Access.

1. Create an application in Citizen Access.
2. On the Fee Payment page, the citizen clicks **Check Out**.

The screenshot shows the Citizen Access interface for paying fees. At the top, there's a navigation bar with links for Complaint/Service Request, Code Enforcement, Building (which is selected), Home, and more. Below the navigation is a row of buttons: Create an Application, Obtain a Fee Estimate, Search Applications, and Schedule an Inspection. A sub-navigation bar for 'Residential New' shows steps 1 through 5: Step 1, Step 2, Review, Pay Fees (which is highlighted), and Record Issuance - JANICE111. The main content area is titled 'Step 4: Pay Fees'. It displays a table of application fees:

Fees	Qty.	Amount
Fee 01	5	\$50.00
Fee 02	2	\$10.00
Fee 03	1	\$15.00
Fee 04	1	\$30.00

Total fees: \$105.00. A note states: "Note: This does not include additional inspection fees which may be assessed later." Below the table are three buttons: 'Check Out' (highlighted with a red box), 'Continue Shopping', and 'Defer Payment'.

If ACA is configured to auto-invoice fees they are automatically added to the shopping cart.

3. The citizen clicks **Edit Cart**.

**Step 1: Select item to pay**

Click on the arrow in front of a row to display additional information. Items can be saved for a future checkout by clicking on the Save for later link.

**PAY NOW**

SSSSSSSSSSSSSS

11111, United States  
1 Application(s) | \$105.00  
▼ Residential New  
16TMP-000651

Fee	Qty.	Amount
Fee 01	5	\$50.00
Fee 02	2	\$10.00
Fee 03	1	\$15.00
Fee 04	1	\$30.00

Total amount to be paid: \$105.00  
Note: This does not include additional inspection fees which may be assessed later.

**Checkout »** **Edit Cart »** **Continue Shopping »**

The Edit Cart page displays:

**EDIT CART - JANICETEST**

wwwwww

11111, United States  
1 Application(s) | \$105.00  
▼ Residential New  
16TMP-000651

Fee	Qty.	Amount	Remove
Fee 01	5	\$50.00 <b>Pay Later</b>	
Fee 02	2	\$10.00	
Fee 03	1	\$15.00	
Fee 04	1	\$30.00 Pay Later	

Total amount to be paid: \$105.00  
Note: The amount shown is an estimate.

**Save and Close**

4. The citizen clicks **Pay Later** to remove fee items from the shopping cart.

Fee Items that have been configured on Civic Platform's Fee Item - Edit page display with the Pay Later link.

5. The citizen clicks **Save and Close** on the Edit Cart page.

The Shopping Cart has two sections, Pay Now and Pay Later. Citizens can click Pay Now on the deferred fees to move them back to the Pay Now section.

6. The citizen clicks **Checkout**, enters the payment details, and completes the payment.

7. To view the status of fees paid and outstanding on the record, open the record and click **Payments > Fees**.

The screenshot shows a web interface for managing fees. At the top, there are four navigation links: 'Create an Application', 'Obtain a Fee Estimate', 'Search Applications', and 'Schedule an Inspection'. Below this, a header displays 'Record BLD16-00020:', 'Residential New', and 'Record Status: Submitted'. On the right side of the header are buttons for 'Add to cart' and 'Add to collection', along with social sharing links for 'Like' and 'Tweet'. A navigation bar below the header includes tabs for 'Record Info', 'Payments' (which is selected), 'Education', 'Assets', and 'More...'. A note 'iris test' is visible near the bottom left of the main content area. The main content is titled 'Fees' and contains two tables. The first table, under 'Outstanding', lists two fees: one for \$50.00 and another for \$30.00, totaling \$80.00. The second table, under 'Paid', lists two fees: one for \$10.00 and another for \$15.00, totaling \$25.00. Both tables include columns for Date, Invoice Number, Amount, and Pay Fees or View Details links. A red box highlights the 'Outstanding' table.

Date	Invoice Number	Amount	
10/13/2016	1776	\$50.00	Pay Fees
10/13/2016	1776	\$30.00	

Total outstanding fees: \$80.00

Date	Invoice Number	Amount	
10/13/2016	1776	\$10.00	View Details
10/13/2016	1776	\$15.00	View Details

Total paid fees: \$25.00

### If You Have Disabled the Shopping Cart

When the Shopping Cart is disabled, the citizen will have the ability to select the Pay Later link during the pageflow process and on the record detail page. The fee items are placed in the Outstanding section of the record detail, in the Payment area. For example, if you select the Pay Later link for the Plan Check Fee, Permit Fee (based on sq footage) and Fixture Count during the pageflow, they are available to pay at a later date via the record detail. For now, you can move forward and just pay the top two fees equaling \$42.

Welcome to City of Metropolis !!

Return to City of Metropolis ?

Logged in as:janice.zhong Collections (22) Reports (2) Account Management Logout

Search...

Complaint/Service Request **Code Enforcement** Building Home more ▾

Create an Application Obtain a Fee Estimate Search Applications Schedule an Inspection

**Residential New**

1 Step 1 2 Step 2 3 Review 4 Pay Fees 5 Record Issuance --JANICE111

**Step 4 :Pay Fees**

Listed below are preliminary fees based upon the information you've entered. Some fees are based on the quantity of work items installed or repaired. Enter quantities where applicable. The following screen will display your total fees.

[Print/View Requirements](#)

Application Fees			
Fees	Qty.	Amount	
Permit Fee (Valuation Based)	5	\$22.00	<a href="#">Pay Later</a>
Technology Surcharge	1	\$20.00	<a href="#">Pay Later</a>
Plan Check Fee (Enter 1)	1	\$99.61	<a href="#">Pay Later</a>
Permit Fee (\$q Footage Based)	1875	\$131.25	<a href="#">Pay Later</a>
Violation Fee (Penalty Fee)	0	\$0.00	
Fixture Counts	5	\$30.00	<a href="#">Pay Later</a>
Test fee without auto asses	0	\$0.00	
Multiplier fee test	0	\$0.00	

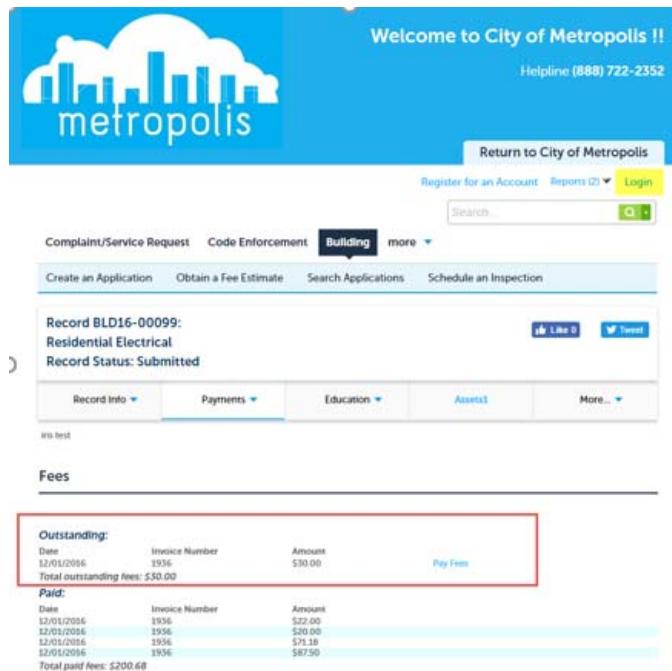
[Recalculate](#)

TOTAL FEES: \$302.86  
Note: This does not include additional inspection fees which may be assessed later.

[Continue Application »](#) [Continue Shopping »](#) [Defer Payment »](#)

### Anonymous Users

For an Anonymous user, the Pay Later link is available during the pageflow process and on the record detail. The remaining fee items display in the Outstanding section of the record detail:



## Defining the Default Qty with Fee Indicators

You can configure Citizen Access to populate the quantity field on the Pay Fees page through a Fee Indicator setting on the Fee Item. See [Figure 98: Fee Item Setup in Classic Administration](#). This setting functions by finding an ASI with the matching Fee Indicator Value and replaces the quantity field with the ASI value independent of the Auto Assess settings. This functionality is useful so that administrators can set the quantity on the pay fee page independent of EMSE or expressions configurations. To learn how to set up a fee item with fee indicators, refer to “Understanding Fee Item Fields” and “Creating Fees with Fee Calculation and ASI Data” in the “Fee Setup” chapter of the *Accela Civic Platform Administrator Guide*.

Figure 99: Qty Field on Pay Fees Page

**Building/ACA/Fee&Payment/ValuationCalculate**

1 Step 1    2 Review    3 Pay Fees    4 Record Issuance

**Step 3:Pay Fees**

Listed below are preliminary fees based upon the information you've entered. Some fees are based on the quantity of work items installed or repaired. Enter quantities where applicable. The following screen will display your total fees.

**Application Fees**

Fees	Qty.	Amount
Job_FeeCalc	2	\$1,010.70

Note: This does not include additional inspection fees which may be assessed later.

\$1,010.70  
Recalculate

## Enabling Fee Estimation

You can offer a way for public users to get a fee estimate online. This is useful so that a builder can plan for the costs associated with a building permit, or a licensed professional can budget their costs for license renewal. This section provides the configurations to get fee estimation up and running in ACA. It also provides the tasks in ACA Admin that prepare web pages for online functionality, such as access to fee estimation from the home page and the content displayed on the fee estimate page.

### Topics

- Configuring Fee Estimation
- Displaying the Fee Estimate Link on Home Page
- Displaying Conditions on the Fee Estimate Page

## Configuring Fee Estimation

Your agency can provide Fee Estimation to display a calculated estimate of fees associated with record types online, which is useful when public users want to know the cost relating to a license, a license renewal, or a permit before submitting an application.

To provide this functionality, you must verify Function Identification (FID) Fee Estimation is enabled. If necessary, activate related FIDs. Then, mark the Fee Estimation check box for the Application Type. After enabling fee estimation and configuring the required fee item and required fee schedule for ACA, fees display with submitted applications and also with partially completed application as an estimate.

Citizen Access displays estimated fees for an application type based on the assigned fee schedule and fee item setup. See [Enabling Fees for Online Functionality on page 359](#). For more information about enabling fee estimation, defining fee-items, configuring fee schedules, and setting up payment periods, refer to the “Fee Setup” chapter in the *Accela Civic Platform Administrator Guide*.

Civic Platform saves partially completed application information when public users get an estimate and do not complete the application process. You can purge the partially completed applications and partial fee estimates associated with them from your system. See [Deleting Partially Completed Applications on page 487](#).

### To enable fee estimation on an application type

1. Log in to Civic Platform and verify FID 0244 Fee Estimation is enabled and then disable FID 0075 Admin License Types to hide Velocity Hall information.
  - If necessary, enable related Functional Identification (FID) 0242 Required for Fee Calculation, 8325 Save Work in Progress of CAP, and 8326 Fee Estimate.

For information on configuring the FIDs, refer to the *Accela Civic Platform Configuration Reference*.

2. Navigate to **Admin Tools > Application > Application Type**.

*Civic Platform displays the Application Type tree.*

3. Select an existing **Application Type** from the tree and click **Edit**.

*Civic Platform displays the Application-Edit page.*

The screenshot shows the 'Application Category - Edit' form. At the top, it says 'Use this form to edit Application Category.' Below that is a section titled 'Enable for ACA?'. It contains several checkboxes:

- Enable Application
- Also Enable Issuance
- Enable Renewal
- Also Enable Issuance

A dropdown menu labeled 'Renewal CAP Type\*' is shown, containing options like 'LAND/AAM51/AAME41/AAMB41'. Below the checkboxes is another checkbox:  Enable Fee Estimation. This last checkbox is highlighted with a red rectangular box. At the bottom of the form, there are fields for 'Group', 'Type', 'Subtype', 'Category', and 'Application Type Alias'.

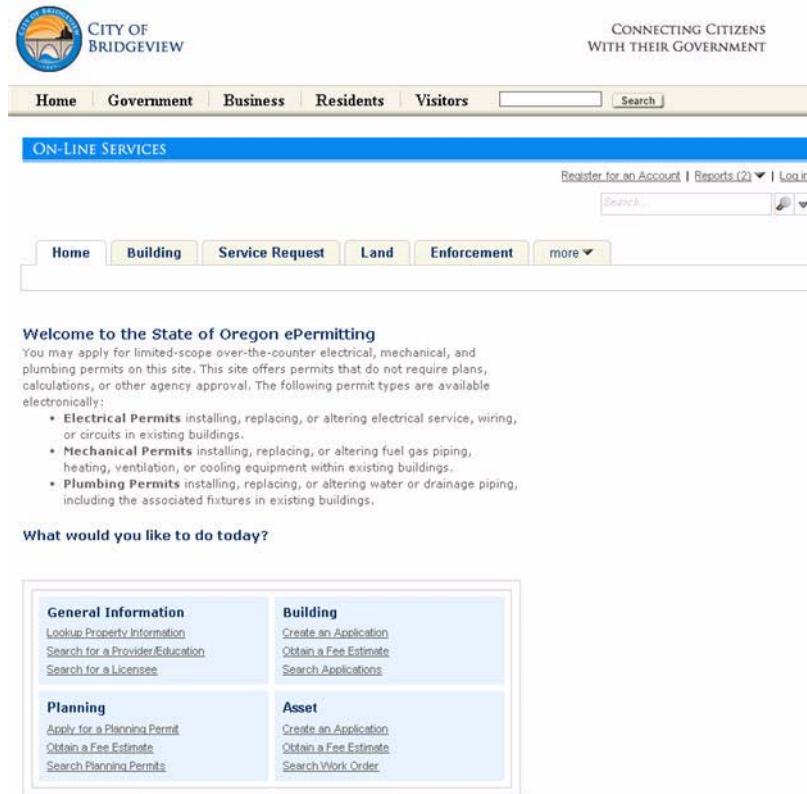
4. Locate the **Enable for ACA?** section.
  - Mark the **Enable Fee Estimation** check box for the application type.
5. Ensure you have assigned a fee schedule to the application types and configured the fee items for ACA display. See [Enabling Fees for Online Functionality on page 359](#). See also, the “Fee Item Fields” list in the “Fee Setup” chapter of *Accela Civic Platform Administrator Guide*.
6. Click the **Save** button.
7. If necessary, define the required fields for fee calculation information in application-specific information groups:
  - a. Define any fields you want to require user information about fee calculations. For instructions, see “Working with ASI Groups and Subgroups” in the “Working with

Application Specific Information" chapter in the *Accela Civic Platform Administrator Guide*.

- b. In the Specific Information group, choose **Yes** in the **Required** field.
- c. In the Specific Information group, choose **Yes** in the **Req for Fee Calc** field.
8. If necessary, define the required fields for fee calculation information in application-specific information tables:
  - a. Set up the table for which you want to make information required for fee calculations. For instructions, see the section "Working with ASI Tables" in the "Working with Application Specific Information" chapter in the *Accela Civic Platform Administrator Guide*.
  - b. For each column of the Application Specific Information table that you want to require, choose **Yes** in the **Required** field.
  - c. For each column of the Application Specific Information table that you want to require for fee calculation, choose **Yes** in the **Req for Fee Calc** field.
9. If necessary, define the required fields for fee calculation information in workflow tasks:
  - a. Set up the workflow task-specific subgroup whose fields you want to make required for fee calculations. For instructions, see "Managing Task-Specific Information" section in the "Workflow" chapter in the *Accela Civic Platform Administrator Guide*.
  - b. For each field of the workflow task that you want to require, choose **Yes** in the **Required** field.
  - c. For each field of the workflow task that you want to require for fee calculation, choose **Yes** in the **Req for Fee Calc** field.
10. Save your changes.

## Displaying the Fee Estimate Link on Home Page

You can display a link on the Welcome home pages where public users can easily access fee estimation for a module. See [Figure 100: Obtain a Fee Estimate Link](#). To display links, you must mark the Obtain a Fee Estimate check box for one or more modules on the Feature Settings page.

**Figure 100: Obtain a Fee Estimate Link**

### To display the links associated with fees

1. Navigate to the Feature Settings page.

*Citizen Access Setup displays a column of features and modules in a tree display.*

2. Expand a module and mark the **Obtain a Fee Estimate** check box.

Features

Features: Mark the check box to activate the feature. If you do not want the feature to display to citizen users clear the check box.  
If you want to require users to be registered and to be logged in to use a feature mark the Force Registration/Login check box.

<input checked="" type="checkbox"/> Registration
<input checked="" type="checkbox"/> Account Management
<input checked="" type="checkbox"/> Login
<input checked="" type="checkbox"/> General Information
<input checked="" type="checkbox"/> Asset
<input checked="" type="checkbox"/> Building
<input checked="" type="checkbox"/> Enforcement
<input checked="" type="checkbox"/> Create a Code Enforcement Case
<input checked="" type="checkbox"/> Obtain a Fee Estimate
<input checked="" type="checkbox"/> Search Code Enforcement Cases
<input checked="" type="checkbox"/> Land

*ACA displays the Obtain a Fee Estimate link on the Welcome pages.*

## Displaying Conditions on the Fee Estimate Page

You can configure various conditions to appear only on the Fee Estimate page, instead of the Record Detail page and Receipt page. To achieve this goal, you must complete two major steps. First, you must configure conditions in Civic Platform. Then, you must enable a script in Citizen Access Setup. If necessary, you may define the appearance of the conditions on the Fee Estimate page, see [Displaying Conditions on page 314](#).

When a public user creates a record by the Obtain a Fee Estimate link, the standard conditions with the “ACA Fee Estimate Page” check box marked in the Display Notice section of Civic Platform are automatically applied to the new record by EMSE script. The conditions appear in an orderly fashion by record type or record type alias (if the record is created for multiple services), condition group, condition type, and then by individual condition.

### To display conditions only on the Fee Estimate page

1. Navigate to Civic Platform Admin.
2. In the Setup portlet, click the **Conditions** item and choose **Conditions** from the drop-down menu.
3. Search for the conditions you want to expose only on the Fee Estimate page.

**Note:** You must establish one or more condition groups, types, and conditions in Civic Platform. However, you do not need to associate the condition to the type of records that public users create. For detailed information, see the “Conditions” chapter in the Accela Civic Platform Administrator Guide.

The screenshot shows the 'Condition: Business Activities Requirement' configuration page. At the top, there are buttons for 'Menu', 'Save', 'View Log', and 'Help'. Below these are tabs for 'Condition', 'Inspections (0)', 'Permissions (0)', 'Record Types (0)', and 'Workflow (0)'. The 'Condition' tab is selected. The main form fields include:

- Condition Name:** Business Activities Requirement
- Status:** Enabled
- Condition Type:** Code
- Short Comments:** Department of Planning and Economy--Business Activities Requirements(s)
- Long Comments:** (empty text area)
- Priority:** --Select--
- Severity:** Required
- Inheritable:** Yes

On the left, under 'Display Notice', three checkboxes are shown: 'Accela Automation' (unchecked), 'ACA' (unchecked), and 'ACA Fee Estimate Page' (checked). This last checkbox is highlighted with a red border. On the right, there are sections for 'Include in Condition Notice' (checkboxes for 'Condition Name' and 'Short Description') and 'Public Display Message' (a text area containing 'Department of Planning and Economy--Business Activities Requirements(s) Requirements For Activity:Distributing Electrical Power Condition(s)').

4. Mark the **check box for ACA Fee Estimate Page** to display the condition only on the Fee Estimate page.

**Note:** If you mark the ACA check box, the condition appears on the respective Record Detail page, Fee Estimate page, and Receipt page of Citizen Access.

5. You need to apply the EMSE to the condition. In the Setup portlet, navigate to **Administration > ACA Admin**.

Civic Platform displays the ACA Admin Configuration page in a pop-up window.

6. Go to the Global Settings page and scroll to the EMSE Scripts section.

The EMSE script selected will fire during the Fee Estimate process. The script will run after the user selects predefined ASI in the Fee Estimate process.

Select script to run before the Fee Estimate page:

FEEESTIMATEAFTER4ACASCRIFT - FeeEstimateAfter4ACAScript

7. Select the FEEESTIMATEAFTER4ACASCRIFT script from the drop-down list.
8. Click the **Save** button.

## Customizing Fee Pages

After enabling fee functionality in ACA, you must prepare your site by customizing the fee pages to display agency defined supportive text to public users. The customization of all web pages occurs in Citizen Access Setup. This section provides a list of the web pages associated with fee functionality to ensure complete setup. For instructions on how to perform tasks associated with web pages, including the customization of content, font, color, and size, refer to [Chapter 10: Working with Web Pages on page 160](#).

### To customize fee pages

1. Navigate to Citizen Access Setup for ACA.
2. Choose a module from the navigation panel and go to the Pages area.
3. Select and customize the following pages in the module-defined Apply folder. These pages are also accessible in page flow configuration for a module. See [Defining the Receipt Page on page 157](#).
  - Pay Fees and Review Information

**Note:** You can configure CREATE\_APPLICATION\_MODEL of the Standard Choice ACA\_CONFIGS to control whether public users access the fee list from the Pay Fees page or the Review Information page. For details about the Standard Choice, refer to the Accela Civic Platform Configuration Reference.

- Receipt

- Renewal Receipt
  - Pay Fee Due Receipt
4. Select and customize the following pages in the Obtain a Fee Estimate folder.
- Fee Estimate Summary
5. If necessary, customize the pages associated with Shopping Cart. See [Configuring Shopping Cart on page 377](#).
6. Define receipts in Report Manager to print. Also, associate the receipt with a button. See [Associating Reports with Print/View Buttons on page 475](#).

## Enabling Payment Methods

You can enable the payment methods, such as Credit Card, Trust Account, and Bank Account, at the agency level for all record fees transactions across modules in Citizen Access. You can also enable the payment methods specifically for one module. The module-level control of payment method overrides the agency-level control. If a module does not have its own payment method enabled, it defaults to the enabled agency-level payment methods.

Here is an example, assuming that an agency has three modules: Building, Licenses, and Code Enforcement. At the agency level, agency administrators enable Credit Card, Trust Account, and Bank Account. In the Building module, Credit is the only payment method for Building record fee transactions. In the Licenses and Code Enforcement modules, agency administrators do not enable specific payment method. Based upon this assumption, Building record fees are payable only by credit card; while the transactions from the other two modules can choose to use any of the agency-level payment methods.

When making payment for records from different modules, public users can only make payment with the common payment methods of the involving modules. Taking the example above, credit card which is the common method among the three modules is the only payment method for the records from the three modules. If there is only one applicable payment method, Citizen Access directly requests the user to enter the details for the payment method. If there are multiple applicable payment methods, users must first select the desired payment method, and then enter the payment details.

After enabling required payment methods, you can configure the Standard Choice ONLINE\_PAYMENT\_MAX\_AMOUNT to specify the maximum payment amount per transaction for each payment method at the agency level or at the module level. For information on configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

**Note:** *If Citizen Access integrates an online payment adapter for payments, and credit card is the only payment method, public users can skip the Payment Options section and go directly to third-party payment page. If there are more than one payment method, public users must first select a payment method in the Payment Options section.*

## Topics

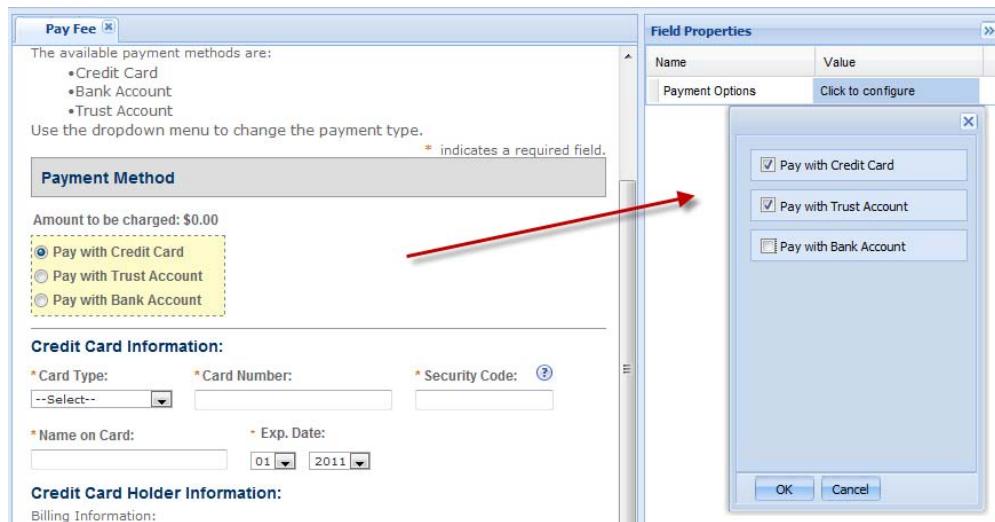
- [Enabling Agency-Level Payment Methods](#)
- [Enabling Module-Level Payment Methods](#)

# Enabling Agency-Level Payment Methods

This section provides the information to enable the payment methods at the agency level.

### To enable agency-level payment methods

1. Navigate to the Citizen Accela Setup.
2. Go to General > Pages > Shopping Cart folder > Pay Fee page.
3. Click the text in the Payment Method section.
4. From the Properties panel on the right side of the web page, click the Value cell to display the payment methods for choices.
5. Mark or clear the check box ahead of the payment methods to select or deselect them.
6. Click the **Save** button in the upper left corner of the screen to save the change.



# Enabling Module-Level Payment Methods

This section provides the information to enable the payment methods for a specific module.

### To enable module-level payment methods

1. Navigate to the Citizen Accela Setup.
2. Go to module > Pages > module-defined Apply folder > Pay Fee page.

3. Click the text in the Payment Method section.
4. From the Properties panel on the right side of the web page, click the Value cell to display the payment methods for choices.
5. Mark or clear the check box ahead of the payment methods to select or deselect them.
6. Click the **Save** button at the upper left corner of the screen to save the change.

## Removing the Pay Fees Link

Citizen Access provides a way to remove the display of a Pay Fees link from the fees section on the Record Detail page and the Pay Fees Due link from the Status column on the Record List page for each module. The setting is necessary when an agency does not implement online payment processing. A public user cannot go into the pay fees page during the application process because the agency does not offer a way to pay monies due over the Internet.

To set up this feature, administrators must disable online payment processing in Citizen Access Setup. When administrators clear the check box for online payment processing, Civic Platform automatically sets the related Standard Choice ACA\_CONFIGS with the Standard Choice Value REMOVE\_PAY\_FEE set to Yes.

### To remove the pay link

1. Navigate to the **Module Settings** page.
2. Go to the Fees section and clear the Display Pay Fee Link check box to hide the link from view. For a visual representation of this configuration, see [Figure 50: Display Pay Fee Link Setting on page 110](#).

*Citizen Access removes the Pay Fees link from the fees section on the Record Detail page and the Status column on the Record List page. Civic Platform sets the Standard Choice Value REMOVE\_PAY\_FEE with the Value Desc. set to Yes.*



## Configuring Shopping Cart

Your agency can provide a shopping cart feature to allow public users to group records or group other items in one location and pay for all items at the conclusion of the session. See [Figure 101: Shopping Cart Details](#).

With the shopping cart functionality, public users can add and manage multiple record transactions. At check-out, the public user receive a message to choose their payment method for the entire transaction, such as credit card, check, or trust account. Should the public user choose to end their session prior to checkout, the items remain in the shopping cart for future sessions. To remove the items from the shopping cart, public users must manually delete, pay

for the items fully. Also the shopping cart remove the items when they exceed the number of days allowed in the expiration settings.

Multiple agencies support this feature. When used in conjunction with a super agency serving multiple agencies, the shopping cart allows multiple transactions across multiple agencies to be added to and managed within the shopping cart. When the public user chooses to check out, he/she sees a message for choosing one appropriate payment method (credit card/check/trust account) for the entire transaction. Agency split the transaction and each agency's merchant account processes the associated amount.

By default, a Citizen Access user can pay for any record across agencies in a single shopping cart transaction. The standard choice value ALLOW\_CROSS\_AGENCY\_RECORDS\_IN\_CART (under the standard choice item ACA\_CONFIGS) provides the ability to restrict the use of cross-agency records in a shopping cart. To restrict a Citizen Access user from adding records from multiple agencies into a shopping cart, disable the standard choice configuration ALLOW\_CROSS\_AGENCY\_RECORDS\_IN\_CART.

By default, Citizen Access payment transactions are processed and submitted to agency-level merchant accounts. The standard choice ENABLE\_MERCHANT\_ACCOUNT\_BY\_MODULE provides the capability to assign a merchant account to a module, which allows payment transactions to use either agency-level or module-level merchant accounts.

To set up the shopping cart, administrators must configure the related Standard Choice ACA\_PAGE\_PICKER, define Cart Settings on the Global Settings page. Also administrators must assign the URL to the Shopping Cart button on the Select Items to Pay page, customize the related shopping cart web pages, and set component configurations in Page Flow.

For information about how to configure a Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

For more information about processing payments by module, see *Civic Platform Administration Guide* > Accounting > Module Merchant Accounts.

**Figure 101: Shopping Cart Details**

The screenshot shows a web-based shopping cart interface. At the top, there is a navigation bar with links for Home, Building, Licenses, Planning, Service Request, and more. Below the navigation bar, a header says "Logged in as: Dwayne Patterson | Collections (1) | Cart (0) | Account Management | Logout". A search bar is also present.

The main content area is titled "Cart" and contains three numbered steps: 1. Select item to pay (highlighted in blue), 2. Payment information, and 3. Receipt/Record issuance. Below these steps, a section titled "Step 1 : Select item to pay" displays a message: "Click on the arrow in front of a row to display additional information. Items can be saved for a future checkout by clicking on the Save for later link." A large blue button labeled "PAY NOW" is prominently displayed.

Under the "PAY NOW" button, there is a message: "No Record". Below this, it says "Total amount to be paid: \$0.00" and includes a note: "Note: This does not include additional inspection fees which may be assessed later." There are two buttons at the bottom of this section: "Checkout" and "Continue Shopping >".

A "PAY LATER" button is located below the "Checkout" and "Continue Shopping" buttons.

The bottom section lists items in the cart:

Item Description	Amount	Action
3210 N DYER St	\$1,057.50	
2 Application(s)	\$1,057.50	
► Residential Building Permit 09TMBP-000932	\$1,018.50	Edit Pay now Remove
► Tentative Map - Residential 09TMBP-000933	\$39.00	Edit Pay now Remove

### To set up the shopping cart

1. Configure the related Standard Choice.
  - a. Navigate to Civic Platform and click the **Admin Tools** tab.
  - b. Choose **Agency Profile > Standard Choices**.

*Civic Platform displays the Standard Choices Browse page.*

- c. Configure ACA\_PAGE\_PICKER Standard Choice so you can pick a URL address from a drop-down list on the Fee Estimate page in Citizen Access Setup.

**Standard Choices Value** Order Number. For example 1 or 2 to indicate order in the list.

**Value Desc** Page Name and URL.

#### Standard Choices Item - Edit

Use this form to set up a Standard Choices Item.

Standard Choices Item Name: ACA\_PAGE\_PICKER

Description:  
(250 char max)

Status:  Enable  Disable

Type:  System Switch  Shared drop-down  EMSE

Standard Choices Value (Default)	Standard Choices Value	Value Desc	Active
1	1	name=go to Disclaimer page, url=/Record/RecordApplyDisclaimer.aspx	
2	2	name=go to Record Home page, url=/Record/RecordHome.aspx	

**Update** **Add** **Cancel**

- d. If your agency plans to disable cross-agency records in a shopping cart, add the ALLOW\_CROSS\_AGENCY\_RECORDS\_IN\_CART value to the ACA\_CONFIGS standard choice item, and set it to No.

**Standard Choices Value** No

**Value Desc** -

**Description** Disallows cross-agency records in a shopping cart. (Yes is the default value.) If a Citizen Access user has added cross-agency records in the shopping cart, Citizen Access returns the following message:

*The selected item(s) cannot be added to the Pay Now section of the Shopping Cart since the agency limits Shopping Cart transactions to items from a single department. Please arrange the Pay Now section of the Shopping Cart so that all payment items are from a single agency department.*

- e. If your agency plans to use sub-agency or module-level merchant accounts, configure the ENABLE\_MERCHANT\_ACCOUNT\_BY\_MODULE Standard Choice.

<b>Standard Choices Value</b>	Yes
<b>Value Desc</b>	-
<b>Description</b>	<p>Enables the usage of module merchant accounts. (No is the default value.)</p> <p>If the ALLOW_CROSS_AGENCY_RECORDS_IN_CART value is set to Yes under the standard choice item ACA_CONFIGS, cross-agency records in a shopping cart are processed per module.</p> <p>If the ALLOW_CROSS_AGENCY_RECORDS_IN_CART standard choice is disabled, only records from one agency will be allowed in the shopping cart. If a merchant account for a particular module has not been assigned, the agency-level merchant account is used.</p> <p>For more information about processing payments by module, see <i>Civic Platform Administration Guide</i> &gt; Accounting &gt; Module Merchant Accounts.</p>

## 2. Define Cart Settings on the Global Settings page.

The screenshot shows the 'Fees and Checkout' configuration page. It includes sections for 'Online Payments', 'Fee Estimate Scripts', and 'Cart Settings'. Under 'Cart Settings', there is a checked checkbox for 'Enable Cart' and dropdown menus for 'Payment Transaction Settings' (set to 'Transaction per Record') and 'Set expiration days for Selected Items' (set to 30). There is also a field for 'Set expiration days for Saved Items' with a value of 30.

Cart Settings	
<input checked="" type="checkbox"/> Enable Cart	Payment Transaction Settings: Transaction per Record Set expiration days for Selected Items: 30 Set expiration days for Saved Items: 30

### a. Enable Cart

Mark the check box to enable shopping cart functionality.

### b. Payment Transaction Settings

Use the drop-down menu to select the payment transaction settings which identifies receipt generation. Choose one of the following:

#### **Transaction Per Shopping Cart**

Default setting which generates one receipt number for the entire shopping cart. You can choose this option if your agency supports online payments or API payments (application programming interface).

When your agency implements multiple agency functionality and you choose this default setting, then a receipt for each agency is generated per shopping cart. ACA can only support API payments (application programming interface) in this environment.

#### **Transaction Per Record Type**

Generates a receipt number for each record type in the shopping cart.

### c. Set expiration days for selected items.

Enter a number to define the number of days items can remain in the shopping cart selected area. When the expiration day arrives, ACA removes the record from the selected items area.

### d. Set expiration days for saved items.

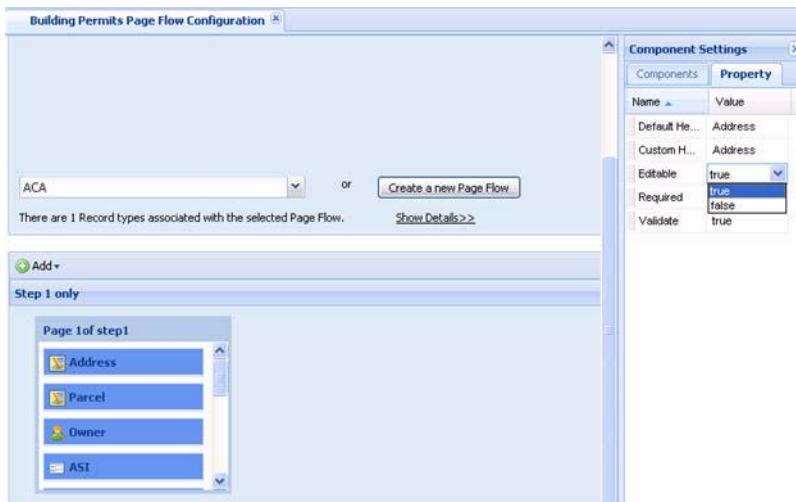
Enter a number to define the number of days items can remain in the shopping cart saved area. When the expiration day arrives, ACA removes the record from the Saved Items area.

## 3. Define the URL for the **Continue Shopping** button on the **Select Items to Pay** page.



- a. Navigate to the **General Pages** area.
- b. Click the **Select Items to Pay** page.
- c. Click the **Continue Shopping** button to activate customization.
- d. Choose one of the available URL options from the URL Value drop-down list.
- e. Click **Save**.

4. Customize the content of shopping cart web pages. For more information on how to customize a web page, see [Chapter 10: Working with Web Pages on page 160](#).
  - Select Items to Pay page
  - Pay Fee page
  - Receipt page
5. Save changes.
6. If necessary, configure Page Flow components. You can define the ability to edit the related component section on the application-intake form and on the review page.



- a. Choose a Module tab and navigate to the Page Flow Configuration page.
- b. Create a new or choose an existing page flow.
- c. Click a component on a page to activate Component Settings in the right panel.
- d. Click the **Property** tab and choose an option from the **Editable** drop-down value cell. You can choose true or false. True allows editing the section on the application-intake form and on the review page. False configures a read-only section on the application-intake form and on the review page. The default value is true.
- e. Click **Save**.

## Online Payment Processing

If you want to allow public users to pay for fees online through Citizen Access, you must set up online payment processing.

Payment processing may require configuring an ePayment adapter, such as the ones provided for use with Accela CivicPay, PayPal, and other popular services. The Accela Delivery Team is available to configure the ePayment adapter for you, or you can use a do-it-yourself approach. To get started with the do-it-yourself approach, download the *ePayments SDK Development Guide* and the ePay SDK.zip file from Success Community. The ePay SDK.zip file includes all of the scripts and web services needed for configuring an ePayment adapter.

## Defining Account Type Payment Options for Epayments3 Adapter

If your agency is using the Epayments Adapter3 for online payments, you can configure a Standard Choice in Civic Platform so you can define the options that display on the Check Payment user page. For example, you can define a business checking or a regular savings account. Refer to the “Payment Processing” chapter in the *Accela Civic Platform Administrator Guide* for configuration details surrounding this Standard Choice. For the back-end functionality of online transactions, contact the Accela Customer Support for the integration package *EPay SDK.zip*.

## Trust Accounts

The Trust Account feature allows you to establish and maintain trust account information, perform trust account transactions, and print trust account reports. There are administrative setup tasks in both Civic Platform and in Citizen Access. This section provides the references to supporting documentation in Civic Platform for those required setup tasks, and it specifies the Citizen Access administrative tasks.

You use Civic Platform to associate an address, parcel, professional, or contact with a trust account. For example, administrators can create and associate addresses and parcels to public users by navigating to Civic Platform and clicking the Admin portlet > System Tools > Public User link > and choosing either the Address or Parcel tab. You also use Civic Platform to set up the permissions for public users by navigating to the Trust Account tab, and clicking the Public User Permission. For details about the tasks, see the “Maintaining Trust Accounts” section in the “Trust Account” chapter of the *Accela Civic Platform Administrator Guide*.

You must also activate the trust account in Citizen Access by enabling Function Identifications and setting up Standard Choices. For the configuration tasks, see the “Trust Account” chapter of the *Accela Civic Platform Administrator Guide*.

In addition to setting up the trust account functionality in Civic Platform, there are specific setup steps (see descriptions below) to complete in Citizen Access.

In ACA, administrators configure the trust account permissions for public users, so the public users can access the Account Management and review the Trust Account Information section to make payment to the parent record using trust account monies that relates to the licensed professional, contact, address, and parcel. You can also set up a print button so they can print a receipt of deposited trust monies. Go to the Trust Account pages in ACA Setup, click the Trust Account web pages and select the Detail, Deposit, or Receipt pages. To illustrate the Trust Account pages in ACA Setup, see [Figure 102: Trust Account Detail Page and Deposit Button Label](#).

When a public user makes the payment for a record, if the available payment method is Trust Account, and there is only one trust account for the payment, Citizen Access automatically processes the payment using the trust account. If there are multiple applicable trust accounts, the user must select one for the payment.

Registered public user may access trust account detailed information through the Account Management > Trust Account Information page, or by creating a record and clicking the Record Detail link to review the Trust Account Information section.

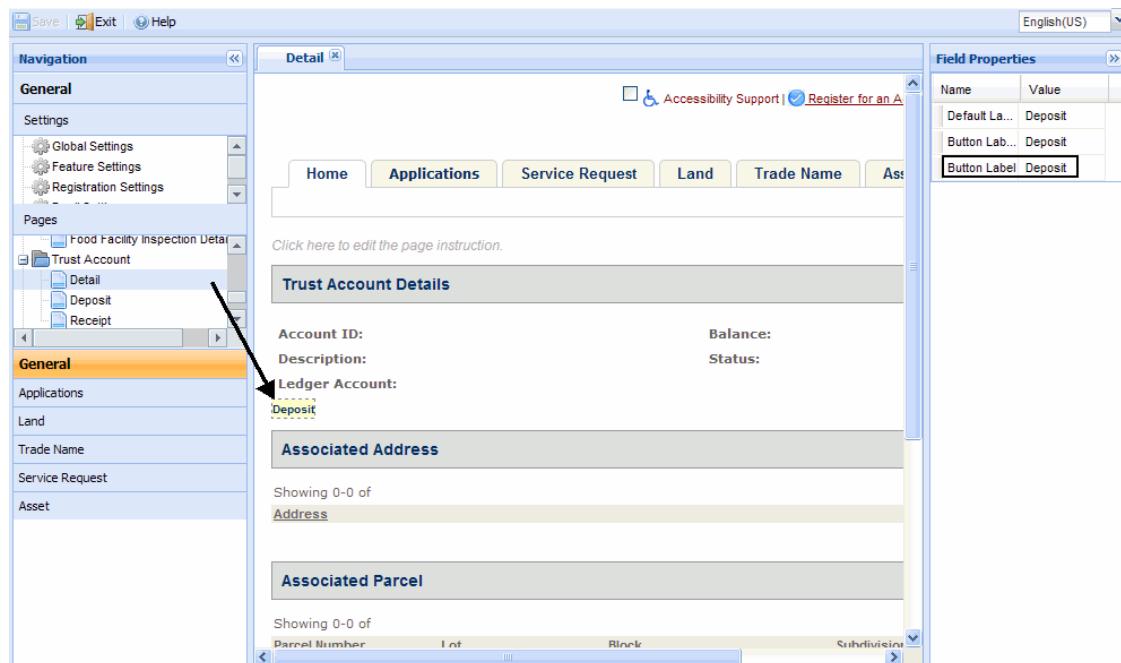
## Setting Up Trust Account Details for Deposit Button

The Deposit button allows public users to access the payment method page so they can deposit money into their trust account through a bank account or a credit card.

The public user can access the deposit function in both the Home page through the Trust Account Details section, and on the Building page in the Transaction Account Information section. Public users can click the Deposit link to open the Payment Method page.

To define the label for the deposit button, click the Detail page. Refer to [Figure 102: Trust Account Detail Page and Deposit Button Label](#). Select the Deposit button and in the Field Properties define the value for the Button Label.

**Figure 102: Trust Account Detail Page and Deposit Button Label**



## Setting Up Print/View Button for Trust Account Receipt

### To set up the Print/View button for a trust account receipt

1. Create and set up the report services.

To integrate Civic Platform with a report service, refer to the “Report Manager” chapter in the *Accela Civic Platform Administrator Guide*.

2. Add the report using the Report Manager portlet in Civic Platform.

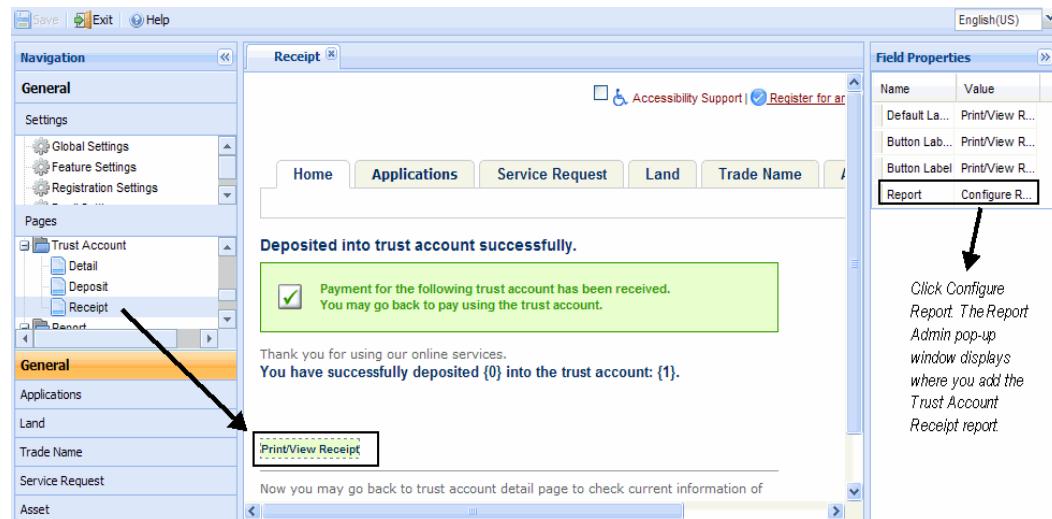
To add a report, see the “Adding a Report” section in the “Report Manager” chapter of *Accela Civic Platform Administrator Guide*.

3. In ACA Setup, click the Trust Account web pages and select the Receipt page.

*Citizen Access displays the Receipt page in the center work area.*

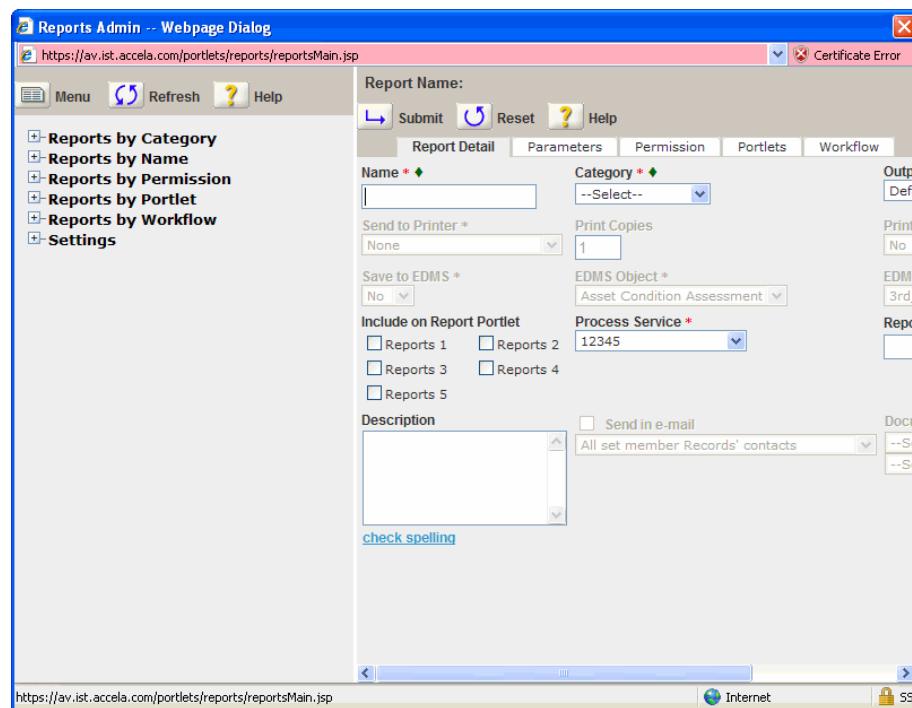
4. Select the Print/View button to access the field properties.

*The Field Properties for the Print/View Receipt button displays.*



5. Click the Configure Report value for the Report name field.

*The Report Admin pop-up window displays.*



6. Add the report that was created in [step 1](#). Complete the fields, referring to the “Report Detail” list under the “Adding a Report” section in the “Report Manager” chapter of *Accela Civic Platform Administrator Guide*.

## Assigning Service Fee Structures to Modules

You can assign a service fee structure for each module by configuring the PAYMENT\_GROUP Standard Choice in Civic Platform. For complete information on configuring a Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

This feature provides the flexibility to use one service fee structure for one module and to use another service fee structure for another module. For example, it is possible to use a fixed service fee for all license applications and to calculate the service fee based on the percentage of the total of applicable fees for building permit applications.

If you assign the modules to the same fee structure, public users can pay for the records of the modules together in the shopping cart as single transaction. If you assign the modules to different fee structures, public users can only pay for the records that are from the same module at a time.

**Note:** *Currently only the OPC CoBrandPlus payment gateway supports different service fee structures for different modules. For other payment gateways, they only support one service fee structure for all modules; the configuration on the PAYMENT\_GROUP does not work for them.*

## CHAPTER 16:

# MANAGING INSPECTIONS

An application process for a building permit or service request require inspection to continue through to the end of a workflow. Your agency can provide the ability for registered professionals or other registered public users, such as an owner, to view and schedule an inspection on their permit online. There are many considerations, such as who can schedule an inspection and what inspection times display to the public. These considerations are all addressed in this chapter.

To set up this functionality, it is critical that you pre-define inspections, inspection types, inspectors, and inspection calendars as explained in the “Inspections” chapter in the *Accela Civic Platform Administrator Guide*. Also see the Configuring Calendars and Inspection Calendars chapters in the *Accela Civic Platform Administrator Guide*. Then, you can perform the inspection features as described in this chapter. As many items are pre-defined, such as inspection types, it is important to use this chapter with [Chapter 11: Implementation Planning on page 201](#) together. Both chapters provide you with a checklist of configurations to ensure you define all dependent configurations, all additional pre-configurations, and all ACA Admin configurations. For a successful implementation of inspections in Citizen Access, refer to [Configuring Records for Processing on page 209](#).

## Topics

- [Defining Inspections for a Module](#)
- [Configuring the Inspection Calendar](#)
- [Managing Inspection Scheduling](#)
- [Customizing Inspection Confirmation Details](#)
- [Creating a Deep Link on the Inspection Detail Page](#)
- [Enabling External Inspectors to Upload Inspection Results](#)

## Defining Inspections for a Module

Together, the Record Detail Section Configuration, Inspection, and Application Status areas of the Module Settings configuration page allow you to set ACA display settings for inspection configurations defined in Civic Platform.

- The role assignment in the Record Detail Section Configuration area can be useful if you want to completely disable some user roles from scheduling inspections for a module. For example, you can choose to provide inspection information for record creators in the Permits module and Licensing module, but not for the Enforcement module. For more information on configuring this area, see [Record Detail Section Configuration on page 130](#).

- The Inspection area allows you to define permissions for which public user can schedule an inspection, set availability of inspection information about public users, enable or disable a default inspection contact, define the display of the optional inspections on the Record Detail page, and enable multiple inspection scheduling. For more information on configuring this area, see [Inspections on page 107](#).
- The Application Status area allows you to restrict the inspection scheduling to ANY public users for certain inspection type when the record is of certain status. For more information on configuring this area, see [Inspection Scheduling Control by Application Status on page 116](#).

## Configuring the Inspection Calendar

Your agency can provide an inspection calendar for the public users with permissions to schedule, reschedule or cancel inspections in ACA.

To set up calendars for ACA, you must complete calendar configurations in the calendar portlets of Civic Platform administrative site and enable the calendar for ACA on the calendar details page. See [Figure 104: Enable Inspection Calendar for ACA on page 389](#). Refer to “Configuring Citizen Access Inspection Calendars” in the *Accela Civic Platform Administrator Guide*.

After configuring the inspection calendar in Civic Platform, you define which users can schedule inspections in ACA Admin. So you do not define calendar permissions for public users on the calendar Permissions tab in Civic Platform. For information about how to define which users can schedule an inspection in ACA, refer to [Configuring Schedule Inspections Permission on page 108](#).

After defining who can schedule inspections online, you define how your agency manages inspection scheduling time parameters. For example, you can provide calendar dates and calendar times to public users for inspection scheduling, you can also restrict inspection scheduling so that public users choose one scheduling option, such as same day or next business day scheduling. For information on how to define public user inspection scheduling options, see [Setting Up Inspection Calendar Parameters on page 394](#).

Finally, you must define how public users view inspection types and schedule inspections online. See [List 7: Schedule Inspection Calendar Options on page 390](#). These options are controlled by the values selected from the Schedule Inspection in ACA drop-down list (Civic Platform Administration> Setup > Calendar portlet > Inspection Types tab > Schedule Inspection in ACA). Choose a value from this drop-down list for each inspection type you want public users to access from the ACA Inspections page. [Figure 105: Civic Platform Inspection Calendar Configuration on page 390](#) displays the Inspection Types tab. For more information about these four options and configuration settings that support them, see [Managing Inspection Scheduling on page 392](#).

For complete configuration information about inspection calendars, please refer to the section “Configuring Citizen Access Inspection Calendars” in the “Inspection Calendars” chapter of the *Accela Civic Platform Administrator Guide*.

Figure 103: Inspection Calendar in ACA

**Schedule Inspection**  
You are scheduling the following inspection:

**Request Inspection**  
You are requesting the following inspection:

Record Number:

Select the time when the inspection starts:  
01 : 30 PM

To continue, select an appointment date and time range by clicking a link on the calendar below:

Nov 2010						Dec 2010						Jan 2011						Feb 2011									
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6		5	6	7	8	9	10	11	2	3	4	5	6	7	8	6	7	8	9	10	11	12
7	8	9	10	11	12	13	12	13	14	15	16	17	18	9	10	11	12	13	14	15	13	14	15	16	17	18	19
14	15	16	17	18	19	20	19	20	21	22	23	24	25	16	17	18	19	20	21	22	20	21	22	23	24	25	26
21	22	23	24	25	26	27	26	27	28	29	30	31	23	24	25	26	27	28	29	27	28						
28	29	30																									

[« Prev](#) [Next »](#)

Select your preferred inspection date:  
 Same Day  
 Next Business Day  
 Next Available Day  
 Inspections scheduled after {0} will be scheduled for the following day.

Comments and instructions for the inspector: (Please include a phone number.)  
 [Text Area]

**Schedule Inspection »** **Request Inspection »**

Figure 104: Enable Inspection Calendar for ACA

Calendar Name: ACA\_DEFAULT\_INSPECTION

Menu **Submit** Help Data Language(♦): US English

Details Permissions Inspection Types

Calendar Name \* ACA\_DEFAULT\_INSPECT

Type \* INSPECTION TYPE # Scheduling Attempts \* 1

Comments

Status \* Active # Units Allocated per Day \* 999

Priority \* 1

Schedule after Cut-off -Select--

Default Block 30 Minute  Enable for ACA

Schedule Cut-off Time

Schedule # Of Days Out 90

Hide Inspection Times in ACA

**List 7: Schedule Inspection Calendar Options**

<b>None</b>	When you select this value, public users can view the corresponding inspection type on the Inspections page, but they cannot request, schedule, or cancel the inspection.
<b>Request Only - Pending</b>	When you select this value from the drop-down list, public users can request an inspection, but they cannot schedule it. After public users request inspections, Citizen Access notifies the appropriate agency user and Citizen Access schedules the requested inspection. For instructions on scheduling inspection in Civic Platform, see the "Inspections" chapter in the <i>Accela Civic Platform User Guide</i> . <a href="#">Figure 106: Citizen Access Request Only - Pending Scheduling</a> on page 391 displays the Pending Scheduling page.
<b>Request Same Day Next Day</b>	When you select this value from the drop-down list, you limit public user inspection scheduling options to three: Same Day, Next Business Day, and Next Available Day. Based on your selection, public users can request inspections for the same day, next business day, or next available day. After public users request inspections, Citizen Access notifies the appropriate agency user and Citizen Access schedules the requested inspection. The inspection cut-off time you set in the Calendar Administration portlet also displays on the Request Same Day Next Day Scheduling page. For example, if you set the cut-off time as 3:00 pm and a public user schedules an inspection at 4:00 pm and marks the Same Day option, Citizen Access schedules the inspection for the first appropriate inspection slot on the next business day. <a href="#">Figure 107: Citizen Access Request Same Day Next Day Scheduling</a> on page 392 displays the Request Same Day Next Day Scheduling page. When public users schedule inspection types that you set up for auto-assignment using the Request Same Day Next Day option, they cannot reschedule or cancel the inspections. After public users schedule inspection types that you set up for manual inspection scheduling using the Request Same Day Next Day option, they cannot reschedule or cancel the inspections.
<b>Schedule Using Calendar</b>	When you select this value from the drop-down list, public users can select the calendar date and calendar time on which to schedule an inspection. <a href="#">Figure 105: Civic Platform Inspection Calendar Configuration</a> on page 390 displays the Schedule Using Calendar option. (It also shows the Request only - pending, and Request same day next day settings.)

**Figure 105: Civic Platform Inspection Calendar Configuration**

The screenshot shows a web-based administrative interface for managing inspection calendar items. The title bar says 'Calendar Item: SameDayCalendar'. Below the title are standard menu items: Menu, Submit, Assign, Delete, Help, Details, Permissions, Inspection Types, Districts, Disciplines. The main area has a table with columns: Inspection Group, Inspection Type, Schedule Inspection In ACA, Cancel Inspection In ACA, Reschedule Inspection. There are three rows of data:

Inspection Group	Inspection Type	Schedule Inspection In ACA	Cancel Inspection In ACA	Reschedule Inspection
SameDay	Exterior	Schedule using calendar	Yes	Yes
SameDay	Interior	Request only - pending	Yes	Yes
SameDay	Electrical	Request same day next day	Yes	Yes

**Figure 106: Citizen Access Request Only - Pending Scheduling**

Home Building Land Planning Asset Enforcement more ▾  
[Apply for an Application](#) [Search for an Application](#) [Obtain a Fee Estimate](#) [Submit an Automated Plan Check](#)

**Request Inspection**  
You are requesting the following inspection:  
**Interior**  
Permit Number: 09CAP-00000095

**To continue, select an appointment date and time range by clicking a link on the calendar below:**

Optional Comments or Instructions for your Inspector:

(Please include an alternate phone number if different from the contact information provided in your application)

**Request Inspection»**

[Return to Permit Details »](#)

**Figure 107: Citizen Access Request Same Day Next Day Scheduling**

The screenshot shows a web-based application interface for scheduling inspections. At the top, there's a header bar with 'License Search Result' and 'Applications or Permits Schedule an Inspection \*'. On the right, there are links for 'Register', 'Reports (0)', and 'Login', along with a search bar and a magnifying glass icon.

**Schedule Inspection:**  
You are scheduling the following inspection:

**Request Inspection:**  
You are requesting the following inspection:

Record Number:  
Select the time when the inspection starts.  
01 : 30 PM

**To continue, select an appointment date and time range by clicking a link on the calendar below:**

Nov 2010							Dec 2010							Jan 2011							Feb 2011						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6		5	6	7	8	9	10	11	2	3	4	5	6	7	8	6	7	8	9	10	11	12
7	8	9	10	11	12	13	12	13	14	15	16	17	18	9	10	11	12	13	14	15	13	14	15	16	17	18	19
14	15	16	17	18	19	20	19	20	21	22	23	24	25	16	17	18	19	20	21	22	20	21	22	23	24	25	26
21	22	23	24	25	26	27	26	27	28	29	30	31	23	24	25	26	27	28	29	27	28	30	31				
28	29	30																									

[« Prev](#) [Next »](#)

**Select your preferred inspection date:**

Same Day  
 Next Business Day  
 Next Available Day

Inspections scheduled after {0} will be scheduled for the following day.

**Comments and instructions for the inspector: (Please include a phone number.)**

[Schedule Inspection »](#)  
[Request Inspection »](#)  
[Return to Record Details »](#)

## Managing Inspection Scheduling

Civic Platform provides a variety of scheduling options for inspections. For example, your agency may want to set up automatic inspection scheduling based on the next available inspector and next available date. If you want to provide a way for customers to schedule or reschedule their own inspections and your agency uses Citizen Access, then administrators configure ACA to allow public users to schedule inspections or multiple inspections. Your agency has the ability to manage when a public user can schedule any inspection for a given

day based on pre-defined inspection scheduling parameters. If your agency wants to oversee the public user inspection scheduling, then administrators configure the ability for public users to request an inspection only. When the public user requests an inspection, it is flagged with a pending status until the agency sets or confirms the requested inspection time. This section provides the available ways that your agency can manage inspection scheduling.

### Topics

- [Customizing Inspection Schedule Link Label](#)
- [Setting Up Inspection Calendar Parameters](#)
- [Setting Up Automatic Inspection Scheduling](#)
- [Providing Multiple Inspection Scheduling](#)
- [Requesting and Pending Inspections](#)

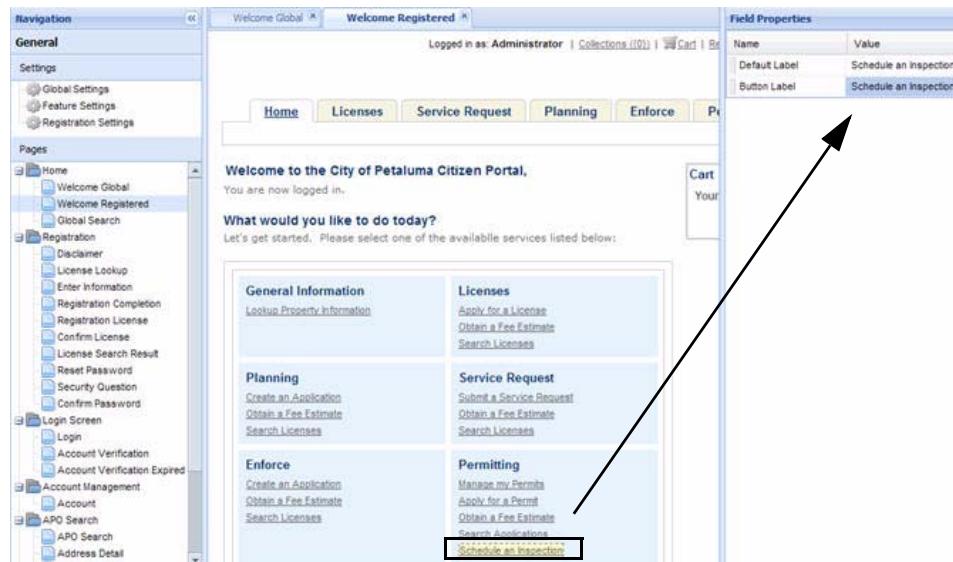
## Customizing Inspection Schedule Link Label

Public users most often schedule inspections from an inspections list. You can configure ACA so public users can log in and click a scheduling link right from the Welcome page to go to their inspections list. To display the links, you must enable the links for each module on the Feature Settings page and then indicate if registration is required to do the task. Optionally, you can customize the link names with a new link label.

### To display the inspection scheduling links

1. Verify inspections are enabled for the module. See [Defining Inspections for a Module on page 387](#).
2. Modify the text of the schedule inspection links on the Home page.
  - a. Go to the **General Pages** area and open the **Home** folder.
  - b. Click the **Welcome** pages to modify the schedule inspection links.

- c. Click the name of the link you want to modify and change the text in the **Value** cell for the **Button Label**.



3. Click **Save**.

## Setting Up Inspection Calendar Parameters

Civic Platform calendar administration and Civic Platform inspection type configuration provides a way to define parameters for when public users can schedule, reschedule, or cancel an inspection.

### Topics

- Defining Inspection Schedule Parameters
- Defining Reschedule and Cancel Parameters

## Defining Inspection Schedule Parameters

Your agency has the ability to control how and when public users can schedule inspections. After you set up your inspection calendar, you can define public user settings. This section provides the field information and instructions for defining public user inspection scheduling parameters.

### To define inspection schedule parameters

1. Click the **Admin** primary tab.

- In the **Setup** portlet, click the **Calendar** item and choose **Calendar** from the drop-down menu.

*Civic Platform displays the Calendar administration portlet.*

Calendar Name	Type	Status
ACA_DWB_ALL_DAY_CALENDAR	INSPECTION	Active
ACA_DEFAULT_INSPECTION_CALENDAR_DWB-AM_PM	INSPECTION	Active
AMCA_DWB_ALL_Day	INSPECTION	Active
Hearing	HEARING	Active
ACA-test	INSPECTION	Active

Calendar Name *	Type *	# Scheduling Attempts *
ACA_DWB_ALL_DAY_CAI	INSPECTION	99
Comments *	Status *	# Units Allocated per Day *
Normal Calendar with day devided into 60 minute increments	Active	16
<input type="checkbox"/> check spelling		
Priority *	Default Block	Schedule Cut-off Time AM/PM
1	30 Minute	11 : 30 AM
<input checked="" type="checkbox"/> Enable for ACA		
Schedule # Of Days Out		
5		
<input type="checkbox"/> Hide Inspection Times in ACA		

- From the tree view, create a new or select an existing calendar you want to work with.
- Complete the fields associated with inspection scheduling for public users. Refer to [List 8: Public User Inspection Schedule Parameter Fields on page 395](#).
- Click **Submit**.

#### List 8: Public User Inspection Schedule Parameter Fields

<b>Enable for ACA</b>	Mark the check box to enable inspection schedule parameter settings for public users.
<b>Hide Inspection Times in ACA</b>	Mark the check box to display calendar dates only. The inspection times for the calendar dates hide from the public user's view.
<b>Schedule Cut-off Time AM/PM</b>	Use the drop-down menus to indicate the cut-off time for inspection scheduling for a day. For example, if the cut-off time is 11:00 AM and the agency administrator sets up next day inspection scheduling, then when a public user wants to schedule an inspection for the day at noon, they can only schedule an inspection on the next available day because the hour passed the cut-off time for the same day.

**List 8: Public User Inspection Schedule Parameter Fields (Continued)**

<b>Schedule # of Days Out</b>	This field is used to control the availability of the inspection calendar to public users. It prevents public users from scheduling inspections too far out in advance on a calendar. Enter a number to define how many future days out from the current date for which public users can schedule an inspection. If a user does not provide a numeric quantity in this field, there is no limit to the date availability on the calendar.
<b>Schedule after Cut-off</b>	Use the drop-down list to define when public users can schedule an inspection after the cut-off time for a day has passed. For example, when public users set this field to next available day with a cut-off time as 11AM, then anytime after 11AM a public user can schedule for the next available day.

## Defining Reschedule and Cancel Parameters

You can configure inspection type reschedule and cancel parameters to determine when public users can reschedule or cancel inspections in Citizen Access. When public users schedule an inspection, inspection type parameters restrict when public users can reschedule or cancel the inspection. The functionality prevents public users from rescheduling or canceling an inspection right before its scheduled start time and ensures that inspection calendars are stable and consistent.

For example, you might set a reschedule restriction for a Code Enforcement inspection at 5:00 PM one day prior to the inspection date. So public users can only reschedule a Code Enforcement inspection up until 5:00 PM the day before Citizen Access schedules and conducts the inspection.

When you set inspection type reschedule and cancel parameters, you must also set the Citizen Access inspection type display. You can configure inspection type display in the Calendar Administration portlets.

In the Calendar Administration portlets, you must first associate inspection types with an inspection calendar. After you associate inspection types with an inspection calendar, you can determine how each inspection type displays in ACA using the Cancel Inspection in ACA, Reschedule Inspection in ACA, and Schedule Inspection in ACA drop-down lists.

Select a value of Yes for the Reschedule Inspection in ACA and Cancel Inspection in ACA drop-down lists if you want to give public users the option to reschedule or cancel inspections. Select a value of No for the Reschedule Inspection in ACA and Cancel Inspection in ACA drop-down lists if you do not want public users to have the option of rescheduling or cancelling inspections in ACA.

When the reschedule and cancel features are enabled, public users can only reschedule and cancel inspections based on the parameters you set for each inspection type.

For complete configuration information about Inspection calendars, please refer to the “Configuring Citizen Access Inspection Calendars” section in the “Inspection Calendars” chapter of the *Accela Civic Platform Administrator Guide*.

### To set inspection type reschedule and cancel parameters

1. Navigate to Civic Platform and click the **Admin Tools** tab.

2. Choose **Inspection > Inspection**.

Civic Platform displays the *Inspection - Search* page.

**Inspection - Search**

Use this form to add or search Inspection Group.

Inspection Group Code:	<input type="text"/>
Inspection Group Name:	<input type="text"/>

**Submit**  
or  
**Add**  
**New Inspection Group**

3. Complete the fields below or click the **Submit** button to search all inspection group codes and inspection group names:

**Inspection Group Code** Enter the code of the inspection group that contains the inspection types for which you want to set inspection reschedule and cancel restrictions.

**Inspection Group Name** Enter the name of the inspection group that contains the inspection types for which you want to set inspection reschedule and cancel restrictions.

4. Click the **Submit** button.

Civic Platform displays the search results on the *Inspection-Browse* page.

**Inspection - Browse**

Use this form to edit an Inspection Group.

<b>Edit</b>	<b>Inspection Group Code</b>	<b>Inspection Group Name(Default)</b>	<b>Inspection Group Name</b>
	• COMBOBLDG	COMBOBLDG	COMBOBLDG
	• STANDARDBLDG	STANDARDBLDG	STANDARDBLDG

**Search**  
or  
**Add**  
**New Inspection Group**

- Click the red dot in the column next to the inspection group code that contains the inspection types for which you want to set inspection scheduling restrictions.

*Civic Platform displays the Inspection - Edit page.*

Inspection - Edit  
Use this form to set up an Inspection Group.

Inspection Group Code: COMBOBLDG  
Inspection Group Name(Default): COMBOBLDG  
Inspection Group Name\*: COMBOBLDG [Inspection Flow](#)

Configure By:  Inspection Flow  Inspection Milestone  None

Inspection Type(Default)	Inspection Type	Guide Sheet Group	Result Group	Required/Optional	ACA Multi-Inspection Auto Assign Unit Schedule	Max Points Flow Enabled	
Structural Unit	Structural Unit	No group assigned	STANDARD_BUILDING	Optional	No	No	Yes
Reschedule Restriction:	<input checked="" type="radio"/> No Restriction <input type="radio"/> Hours Prior 1 Days Prior 0 at 05:00 AM						
Cancel Restriction:	<input checked="" type="radio"/> No Restriction <input type="radio"/> Hours Prior 1 Days Prior 0 at 05:00 PM						
Electrical Unit	Electrical Unit	No group assigned	Electrical	Optional	No	No	Yes
Reschedule Restriction:	<input checked="" type="radio"/> No Restriction <input type="radio"/> Hours Prior 1 Days Prior 0 at 05:00 AM						
Cancel Restriction:	<input checked="" type="radio"/> No Restriction <input type="radio"/> Hours Prior 1 Days Prior 0 at 05:00 AM						

[Update](#) [Add Type](#) [Cancel](#)

- Mark an option and set time and set date values for the Cancel Restriction and Reschedule Restriction fields.
- Click the **Update** button.

*Civic Platform updates the inspection type.*

Inspection - Edit  
Use this form to set up an Inspection Group.

Inspection Group Code: COMBOBLDG  
Inspection Group Name(Default): COMBOBLDG  
Inspection Group Name\*: COMBOBLDG [Inspection Flow](#)

Configure By:  Inspection Flow  Inspection Milestone  None

Inspection Type(Default)	Inspection Type	Guide Sheet Group	Result Group	Required/Optional	ACA Multi-Inspection Auto Assign Unit Schedule	Max Points Flow Enabled	
Structural Unit	Structural Unit	No group assigned	STANDARD_BUILDING	Optional	No	No	Yes
Reschedule Restriction:	<input checked="" type="radio"/> No Restriction <input type="radio"/> Hours Prior 1 Days Prior 0 at 05:00 PM						
Cancel Restriction:	<input checked="" type="radio"/> No Restriction <input type="radio"/> Hours Prior 1 Days Prior 0 at 05:00 PM						
Electrical Unit	Electrical Unit	No group assigned	Electrical	Optional	No	No	Yes
Reschedule Restriction:	<input checked="" type="radio"/> No Restriction <input type="radio"/> Hours Prior 1 Days Prior 0 at 05:00 AM						
Cancel Restriction:	<input checked="" type="radio"/> No Restriction <input type="radio"/> Hours Prior 1 Days Prior 0 at 05:00 AM						

[Update](#) [Add Type](#) [Cancel](#)

## Setting Up Automatic Inspection Scheduling

You can set up inspections so Citizen Access assigns and schedules inspectors automatically. Each inspector has an inspector profile that contains inspectors' daily inspection units, district location, identified disciplines, and availability. This profile is used against the conditions identified for the inspection to assign the appropriate inspector. These conditions check the daily inspection units for highest work efficiency, match the inspectors' districts with the parcel address from the application, match one of the inspector's disciplines with the inspection disciplines, and then check the inspection date against the inspector's calendar for availability.

Before automatic inspection scheduling can work, you must set up the inspector profile, identify inspection conditions, and enable the auto assign inspections feature.

You must consider the four factors for automatic inspection scheduling: geographic district, inspector discipline, calendar availability, and workload availability. In order for automatic inspection assignments to be effective, administrators must set up each of the four areas, which includes the configuration of Functional Identification (FID) numbers, Standard Choices, and data. If the inspection or the Record has a hold or has a lock condition notice, the auto-assign feature will not function for that item until the condition has been lifted.

## Providing Multiple Inspection Scheduling

Your agency can provide public users with the ability to request/schedule multiple or repeat inspections online. When a public user logs into their ACA account, he can navigate to the inspections area and schedule their inspections. If there is only one available inspection type, Citizen Access directly require the user to schedule the inspection for the inspection type. If there are multiple inspection types, the user can pick one inspection type and schedule the inspection for the type. See [Figure 108: Multiple Inspection Scheduling on page 399](#).

Multiple inspection scheduling is useful when a licensed professional requires numerous inspections for a project. For example, a large project may require numerous concrete inspections for multiple concrete pours or multiple electrical inspections in a town home new development area. To implement this feature, administrators must change the No default setting for the ACA Multi-Inspection Schedule field for an inspection type to Yes. Then, administrators must allow multiple inspection scheduling for a module. You can set it up in Citizen Access Setup on the Module Settings page.

This section provides instructions on how to configure the multiple inspections feature. For complete inspection configuration information, see also the “Inspection Calendars” chapter in the *Accela Civic Platform Administrator Guide*.

For administrative reference, when administrators change the multiple inspection scheduling option in Citizen Access Setup, Civic Platform automatically changes the corresponding Standard Choices Value Desc. for Standard Choices Values MULTIPLE\_INSPECTIONS\_ENABLED for Standard Choice ACA\_CONFIGS.

**Figure 108: Multiple Inspection Scheduling**

▼ Inspections				
Showing 1-20 of 47				
Insp. Type	Status	Date	Inspector	
110 Shear Walls	TBD	TBD		<a href="#">Schedule</a>
233 Underground Conduits	TBD	TBD		<a href="#">Schedule</a>
121 Lath	TBD	TBD		<a href="#">Schedule</a>
233 Underground Conduit	TBD	TBD		<a href="#">Schedule</a>
190 Misc Structural	TBD	TBD		<a href="#">Schedule</a>
290 Misc Electrical	TBD	TBD		<a href="#">Schedule</a>
390 Misc Plumbing	TBD	TBD		<a href="#">Schedule</a>
490 Misc Mechanical	TBD	TBD		<a href="#">Schedule</a>
001 Combo 340,101,220	TBD	TBD		<a href="#">Schedule</a>
002 Combo 103,356,470	TBD	TBD		<a href="#">Schedule</a>
003 Combo 341,342	TBD	TBD		<a href="#">Schedule</a>
▼ 004 Combo (1)	TBD	TBD		<a href="#">Schedule</a>
	Scheduled	04/11/2009	TBD	<a href="#">Reschedule</a> <a href="#">Cancel</a>
099 Combo 199, 299,399,499	TBD	TBD		<a href="#">Schedule</a>
101 Footings, Foundation	TBD	TBD		<a href="#">Schedule</a>
102 Gravel	TBD	TBD		<a href="#">Schedule</a>
103 Girders/Joists	TBD	TBD		<a href="#">Schedule</a>
▼ 104 Frame (3)	TBD	TBD		<a href="#">Request</a>
Pending	05/30/2009	TBD		<a href="#">Cancel</a>
Cancelled	05/08/2009	TBD		
Approved	01/23/2009	John		

## To configure multiple inspection scheduling

- Define which inspection types are enabled for ACA multiple inspections. This configuration is in Civic Platform. For more information, refer to the "Establishing Inspection Types" section in the "Inspections" chapter of the *Accela Civic Platform Administrator Guide*.

The screenshot shows the 'Inspection - Edit' page with the following details:

- Inspection Group Code:** BLDG\_W\_HVAC
- Inspection Group Name:** BLDG\_W\_HVAC
- Configure By:** Inspection Flow (selected)
- Inspection Type:** 31 Mech-Top/Rough, 47 Plmg-Gas, 79 Elect FINAL, 98 Plmg FINAL, 39 Mech FINAL
- Guide Sheet Group:** General
- Result Group:** Department
- Required/Optional:** Optional
- ACA Multi-Inspection Schedule:** Yes (highlighted with a red box)
- Auto Assign Unit:** Yes
- Max Points Flow Enabled:** No
- IVR NUMBER:** [empty]
- Display Order:** [empty]

At the bottom, there are buttons for **Update**, **Add Type**, and **Cancel**.

- Navigate to **Citizen Access Setup > Module Settings**.
- Locate the **Inspections** section and mark the applicable option to allow for multiple inspection scheduling.
  - Yes allows multiple inspection scheduling.
  - No restricts inspection scheduling.
  - The default setting for this option is No.

The screenshot shows the 'Building Settings' page with the following configuration:

- Maps:** Includes a checkbox for 'Display Map'.
- Inspections:**
  - Select which users are able to schedule inspections:** Options include All ACA Users, CAP Creator, Licensed Professional, Contact, or Owner.
  - Select display inspections to citizen users:** If Yes is selected, the Inspections section displays to public users on the Detail page. If No is selected, the Inspections section does not display to public users on the Detail page.
  - Select to display optional inspection to citizen users:** If Yes is selected, optional inspections display to citizen users. If No is selected, optional inspections will not display to citizen users.
  - Allow multiple inspections:** If Yes is selected, allow multiple inspections and use inspection type settings for each inspection type. If No is selected, do not allow any multiple inspections.
- Select who is able to schedule inspections:** Options include ALL ACA Users, CAP Creator, Licensed Professional, Contact, or Owner. The 'ALL ACA Users' option is checked.
- Display inspections:** Options include Yes (radio button selected) and No.
- Display optional inspections:** Options include Yes (radio button selected) and No.
- Allow multiple inspections:** Options include Yes (radio button selected) and No. This option is highlighted with a red box.

- Click **Save**.

## Requesting and Pending Inspections

Civic Platform provides the ability to manage inspection scheduling for public users. Administrators can configure the request and pending feature so public users can only request an inspection online. After public users' request is submitted through ACA, the inspection is held at a pending status until the agency approves the inspection appointment using the inspection calendar. See [Figure 109: Requesting an Inspection on page 402](#). Upon approval, Civic Platform uses EMSE to send an e-mail notification of the inspection appointment to the public user.

For example, a builder on a town home development project schedules a plumbing and electrical inspection for the clubhouse. After logging in to the ACA account, the public user goes to their inspections list and clicks the Request link for the applicable inspections for their applications. Public users provide their desired date and time for inspections with any additional comments to the inspector. Civic Platform saves the inspection request information with a pending status until agency approval. The agency employee approves the appointment and an e-mail notification is sent to the public user.

Administrators can view which inspections from ACA are in the pending status at any time by filtering the inspection calendar to show Requested Pending Inspections or Pending Inspection List by ACA. Administrators can also see those inspections already approved by the agency by filtering the inspection calendar to show Result Pending Inspection List.

Administrators must do the following tasks to implement the request and pending feature in ACA. First, administrators must have pre-defined inspection types and must set the scheduling parameters in Civic Platform. Then, administrators must navigate to the inspection type tab in the inspection calendar and choose the Request Only - Pending option from the Schedule Inspection in ACA drop-down list for applicable inspection types. This configuration changes the Schedule link to a Request link for the applicable inspection type in the public user's inspection list. Then, administrators must navigate to the Content Customize portlet to define the e-mails associated with the request and pending feature. Finally, administrators can navigate to a Module in Citizen Access Setup and customize the content or labels associated with the modular inspection scheduling web page. For additional information on setting up calendars and inspection type configurations, refer to the "Inspections" and the "Configuring Calendars" chapters in the *Accela Civic Platform Administrator Guide*.

Figure 109: Requesting an Inspection

▼ Inspections						
Insp. Type	Status	Date	Inspector	Reschedule	Cancel	
Final - Pool	Scheduled	03/10/2009	Amber W Smith			
Final - Building	Pending	TBD	TBD		Cancel	
Final - Plumbing	Pending	TBD	TBD		Cancel	
Final - Mechanical	Pending	03/11/2009	TBD		Cancel	
Final - Sign	Pending	03/10/2009			Cancel	
Final - Electrical	Optional	TBD	TBD	Request		
Final - Finish Grading	Optional	TBD	TBD	Request		
Final - Re-roof	Optional	TBD	TBD	Request		
Final - Demolition	Optional	TBD	TBD	Request		
Temp Power Pole & Meter Auth	Optional	TBD	TBD	Request		
Setbacks	Optional	TBD	TBD	Request		
Foundation Forms & Rebar	Optional	TBD	TBD	Request		
Pier Holes and/or Rebar	Optional	TBD	TBD	Request		
Footing	Optional	TBD	TBD	Request		
Retaining Walls & Rebar	Optional	TBD	TBD	Request		
Sewer Connection	Optional	TBD	TBD	Request		
Water Service Connection	Optional	TBD	TBD	Request		
Slab Reinforcement	Optional	TBD	TBD	Request		
Under Slab Plumbing	Optional	TBD	TBD	Request		
Under Slab Electrical	Optional	TBD	TBD	Request		

&lt;Prev Additional Results: 1 2 3 4 5 Next&gt;

### To configure request only and pending inspections

- As a pre-requisite, verify you define each inspection type and inspection schedule parameter information correctly. For information on how to configure inspection types, refer to the “Establishing Inspection Types” section in the “Inspections” chapter of the *Accela Civic Platform Administrator Guide*.
- Configure Request Only-Pending scheduling option for inspection types in the inspection calendar.
  - Click the **Admin** primary tab.
  - In the **Setup** portlet, click the Agency Profile link and choose **Inspection Calendar** from the drop-down list.
 

*Civic Platform displays the inspection calendar details.*

  - Click the **Inspection Type** tab.
  - Choose the **Request Only - Pending** option from the **Schedule Inspection in ACA** drop-down list for those inspections to which you want to apply the request only feature.
  - Click **Save**.
- Customize related e-mails.
  - Click the **Admin** primary tab.
  - In the **Setup** portlet, click the Agency Profile link and choose **Content Customize** from the drop-down list.
 

*Civic Platform displays the Content Customize portlet.*

- c. Configure the e-mail sent to the public user after requesting an inspection online.  
ACA\_EMAIL\_INSPECTION\_STATUS\_CHANGE\_CONTENT  
ACA\_EMAIL\_INSPECTION\_STATUS\_CHANGE SUBJECT
  - d. Configure the e-mail sent to the public user after the agency approves the inspection appointment in Civic Platform.  
AA\_EMAIL\_INSPECTION\_STATUS\_CHANGE\_CONTENT  
AA\_EMAIL\_INSPECTION\_STATUS\_CHANGE SUBJECT
4. Customize the labels and text on the Schedule an Inspection web page for each module.
    - a. Navigate to Citizen Access Setup and click a Module tab.
    - b. Go to the Pages area in the navigation panel and choose the Schedule an Inspection page for the module.
    - c. Citizen Access Setup displays the Schedule and Inspection Web page in the center panel.
    - d. Modify text or labels and click **Save**.

## Customizing Inspection Confirmation Details

After public users schedule inspections, an inspection confirmation page displays the inspection details. Inspection details include the permit number for which the inspection is scheduled, and include the inspection date and time, and inspection reschedule and cancel policies.

You can customize the information that displays on the Inspection Confirmation page. Customize page details to ensure that public users receive accurate inspection confirmations.

### To customize inspection confirmation details

1. Navigate to Citizen Access Setup and select a modular tab.

2. Click the **Inspection Confirmation** link.

*Citizen Access displays the Inspection Confirmation page.*

3. Click the page area you want to modify.

*Citizen Access displays the page details in the **Field Properties** box.*

Field Properties	
Name	Value
Default Label	Cancellations must be ...
Text Heading(Default ...	Cancellations must be ...
Text Heading	Cancellations must be ...
Font-Bold	true
Font-Italic	false
Font-Family	
Font-Size	
Font-Color	

4. Modify page details in the **Fields Properties** box, including the default label, the text headings, and the font style. For detailed instructions on customizing web pages, see [Chapter 10: Working with Web Pages](#) on page 160.

*Citizen Access updates the Inspection Confirmation page details.*

## Creating a Deep Link on the Inspection Detail Page

Agencies that store some inspection information in a third-party web application can configure a deep link on the Inspection Detail page to help public users seamlessly navigate from Citizen Access to the third-party web application.

### To create a deep link on the Inspection Detail page

1. Navigate to Citizen Access Setup and select a modular tab.
2. Click the Inspection Detail web page under the Inspection folder.

*Citizen Access Setup displays the Inspection Detail web page for the selected module.*

3. Click the area that contains inspection name variables.

*Citizen Access Setup displays the Field Properties area.*

Field Properties	
Name	Value
Default Label	<H1><DIV>\$\$Inspec...
Body Text	<H1><DIV>\$\$Inspec...

\$\$InspectionType\$\$ (\$\$InspectionID\$\$,  
\$\$InspectionRequiredStatus\$\$)  
[Click here for more information](#)

4. Click the Body Text Value field to open the HTML Editor window.

You can add a text and embed a hyperlink in it. For more information about the HTML Editor, see [Using the HTML Editor on page 161](#).

## Enabling External Inspectors to Upload Inspection Results

Contract inspectors or self-certified inspectors are not agency employees but they can log in to Citizen Access to do the following through the Upload Inspection Results page (see [Figure 110: Upload Inspection Results Page for User on page 407](#)):

- View inspections assigned to their Civic Platform user accounts, and view inspections on records associated with their licensed professional records. Citizen Access groups the inspections by status: the New Inspections section lists all pending and scheduled inspections, and the Resulted Inspections section lists all completed inspections.
- Download the list of new inspections into a CSV file from the New Inspections section.
- Enter inspection results in the CSV file and upload the CSV file to Citizen Access. Citizen Access accepts the uploaded file only when it meets the following requirements. Otherwise, Citizen Access prompts an error message.
  - The file only contains the pending or scheduled inspections assigned to the inspector through the inspector's Civic Platform user account or the inspector's licensed professional record.
  - The file name contains the correct extension .csv.
  - The file content is in the format that your agency has defined.
  - The file contains all required columns.
- Attach documents or images to a completed inspection from the Resulted Inspections section.
- View the log of the inspections for which Citizen Access fails to update the results based on the inspection result CSV file.

**Figure 110: Upload Inspection Results Page for User**

The screenshot shows the 'Upload Inspection Results' page with three main sections:

- New Inspections:** Shows a table of scheduled inspections. The first 10 rows are listed below:
 

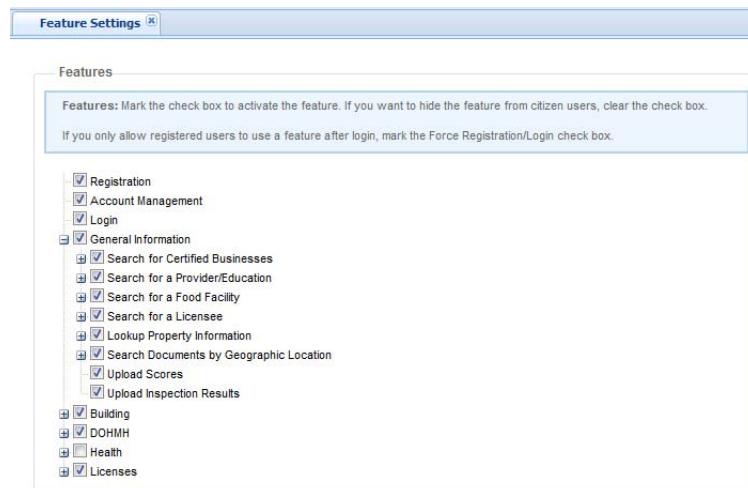
Inspection Type	Address1	Record ID	Status	Scheduled Date
Audit Inspection	98 Sun set RNCH S, San Ramon NY United States, 3	13CAP-00000063	Scheduled	08/23/2013
Audit Inspection	98 Sun set RNCH S, San Ramon NY United States, 3	13CAP-00000063	Scheduled	08/23/2013
Audit Inspection	98 Sun set RNCH S, San Ramon NY United States, 3	13CAP-00000063	Scheduled	08/23/2013
Audit Inspection	98 Sun set RNCH S, San Ramon NY United States, 3	13CAP-00000063	Scheduled	08/23/2013
Audit Inspection		13CAP-00000064	Scheduled	08/23/2013
Audit Inspection		13CAP-00000064	Scheduled	08/23/2013
Audit Inspection		13CAP-00000064	Scheduled	08/23/2013
Audit Inspection		13CAP-00000064	Scheduled	08/23/2013
Audit Inspection		13CAP-00000064	Scheduled	08/23/2013
Audit Inspection		13CAP-00000064	Scheduled	08/23/2013
- Resulted Inspections:** Shows a table of inspection results. The first 10 rows are listed below:
 

Inspection Type	Status	Inspection Date2	Address3	Record
009 Combo 810_389	Approved	08/20/2013		13CAP-0
010 Combo 135_877_589	Approved	08/20/2013		13CAP-0
011 Combo 235_827_145	Approved	08/20/2013		13CAP-0
012 Combo 935_537_445	Approved	08/20/2013		13CAP-0
013 Curren 209_101_238	Approved	08/20/2013		13CAP-0
103 Girders/Joists	Approved	08/20/2013		13CAP-0
104 Frame	Approved	08/20/2013		13CAP-0
101 Footings	Approved	08/20/2013		13CAP-0
099 Combo 199_299_399_499	Approved	08/20/2013		13CAP-0
109 Fire Walls	Approved	08/20/2013		13CAP-0
113 Stucco Scratch	Approved	08/20/2013		13CAP-0
121 Lath	Approved	08/20/2013		13CAP-0
- Log File:** Shows a table of log files. The first 9 rows are listed below:
 

Log File Name-t	Log Time
NewInspection.ls120130906_log_20130907020043.csv	9/7/2013 2:00:43 AM
NewInspection.ls120130906_log_20130907013345.csv	9/7/2013 1:33:46 AM
0902_log.csv	9/2/2013 3:52:33 AM
NewInspection.ls120130827-Test1_log.csv	8/30/2013 2:43:40 PM
NewInspection.ls120130827-Test2_log.csv	8/27/2013 1:47:19 PM
NewInspection.ls120130827-Test2_log.csv	8/27/2013 1:44:51 PM
NewInspectionList20130827_SH_2_log.csv	8/27/2013 6:25:02 AM

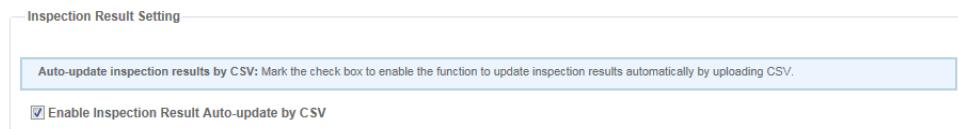
### To enable external inspectors to upload inspection results

- Configure Standard Choice INSPECTION\_RESULT\_CSV\_FORMAT to define the format of the inspection result CSV file.  
For more information about the Standard Choice, see the *Accela Civic Platform Configuration Reference*.
- Mark the **Upload Inspection Results** check box on the Feature Setting page to display the Upload Inspection Results link on the Welcome Registered page.  
For more information, see [Feature Setting Configurations on page 82](#).



3. Configure Inspection Result Setting on the Global Settings page to decide whether it is necessary to review the inspection result CSV file from an external inspector before the inspection results get updated (Optional).

For more information, see [Inspection Result Setting on page 77](#).



4. Customize the label of the **Upload Inspection Results** link on the Welcome Registered page (Optional).

The screenshot shows the 'Welcome Registered' page. On the left, there are three main sections: 'General Information', 'DOHMH', and 'Building'. The 'General Information' section contains a link 'Upload Inspection Results' which is highlighted with a red box. On the right, a 'Field Properties' panel is open, showing a table with one row. The 'Name' column is 'Button Label' and the 'Value' column is 'Upload Inspection Result'. A red arrow points from the 'Upload Inspection Results' link in the 'General Information' section to the 'Value' field in the 'Field Properties' panel.

Name	Value
Default Label	Upload Inspection Result
Button Label	<b>Upload Inspection Result</b>

5. Customize the Upload Inspection Results general web page located in the Provider/Education/Licensee Search folder.

For more information about the customization, see [Chapter 10: Working with Web Pages on page 160](#).

Upon login to Citizen Access, external inspectors access the Upload Inspection Results page by default. If they navigate to the other pages, they can click the Upload Inspection

Results link on the Welcome Registered page to return to the Upload Inspection Results page.

The screenshot shows the 'Upload Inspection Results' page within the Accela Civic Platform. The left sidebar, titled 'Navigation', contains a tree view of various administrative settings and pages. Under 'General', the 'Upload Inspection Results' node is highlighted. The main content area is titled 'Upload Inspection Results'. It includes a search bar with 'Announcements', 'Register', 'Reports (0)', and 'Login' links, and a 'Search...' input field. Below the search bar are navigation tabs: Home, Building, DOHMH, and Licenses. A message box says 'Click here to edit the page instruction.' A section titled 'New Inspections' contains a note: 'After the second or third time I griped about a misbehaving router, one of my friends convinced me to try DD-WRT.ddf'. Below this is a table header for 'Inspection Type', 'Address1', 'Record ID', 'Status', and 'Scheduled Date'. A link 'Click here to download the inspection list in inspection result CSV format' is provided. A section titled 'Resulted Inspections' follows, with a table header for 'Inspection Type', 'Status', 'Inspection Date2', 'Address3', and 'Record ID'. A link 'Click here to upload inspection results' is present. Finally, a 'Log File' section is shown with a table header for 'Log File Name' and 'Log Time'.

## CHAPTER 17:

# AUTHORIZED SERVICE

Citizen Access supports authorized license sales such as fishing and hunting license sales. You can create authorized agents in Civic Platform. Authorized agents can then create authorized agent clerks in Citizen Access. Both authorized agents and authorized agent clerks can conduct authorized service sales in Citizen Access.

This chapter provides you with configuration information so you can complete the implementation of authorized service throughout the various areas of Civic Platform and ACA Admin.

## Topics

- [Updating the Web.config File](#)
- [Configuring Authorized Service Settings](#)
- [Customizing the Account Management Page for Authorized Agents](#)
- [Configuring the Authorized Service Sale Pages](#)
- [Enabling License Tag Printing](#)
- [Configuring Authorized Service in Civic Platform](#)

## Updating the Web.config File

The authorized service requires you to add the following line into the `<httpModules>` section of the `web.config` file in your Citizen Access installation directory.

```
<add name="ActionFilterModule"  
type="Accela.ACA.Web.Common.ActionFilterModule"/>
```

## Configuring Authorized Service Settings

You must configure the related Standard Choices to define the service type that the agency can authorize to its agents. For each service type, you can define which record types Citizen Access provides for authorized agents and agent clerks to sell the licenses.

### To configure authorized service settings

1. Configure the related Standard Choices.

<b>Standard Choice AUTHORIZED_SERVICE</b>	This Standard Choice defines the authorized service types that the agency can support, and the printers that authorized agents or authorized agent clerks can use for printing license tags in authorized service.
<b>Standard Choice REPRINT_REASON</b>	This Standard Choice defines the possible reasons for authorized agents or clerks to select when they attempt to reprint a license tag in Citizen Access.

For complete information on configuring Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

2. Create record types in Civic Platform applicable for the authorized agents and authorized agent clerks to select in the authorized service. Currently Citizen Access only supports authorized service for fishing and hunting licenses. You can create a few record types for use in fishing and hunting license sales.

Consider the following points when you design a record type for license sales:

- The associated fee schedule must cover all fee items applicable to the record type. The fee items can be a package price for the base license plus separate license prices and quota prices.
- The SmartChoice of the record type must enable one or more transactional contact types. You can design a contact template for the transaction contact types and a reference contact type (for example, a “hunter” reference contact type) for collecting the additional personal information in a specific authorized service sale.

3. Define a filter that includes the record types that you create for fishing and license sales. For information on creating a record type filter, see [Record Type Filters on page 122](#).

4. Specify a record type filter for the authorized service.

- a. Navigate to the Citizen Access Setup.
- b. Go to General > Settings > Authorized Service Settings page.

Citizen Access displays the Authorized Service Settings page.

The screenshot shows the 'Authorized Service Settings' page in Citizen Access. The main title is 'Authorized Service Settings'. Below it, under 'Fishing and Hunting License Sales', there is a note: 'Module: Select in which modules are the fishing and hunting license record types configured.' and 'Record Type Filter: Select the record type filter that filters out all record types configured for fishing and hunting license sales.' There are two dropdown menus: 'Module Name' set to 'Licenses' and 'Record Type Filter' set to 'LICENSE APPLICATIONS'. At the bottom of the form are two buttons: 'OK' and 'Cancel'.

**Note:** To make sure the Authorized Service Settings page properly displays the Module Name and Record Type Filter drop-down lists, please disable the Compatibility View feature in Internet Explorer.

- c. Select the module that the record type filter belongs, and then select the record type filter.
- d. Click **OK** to save the changes.

## Customizing the Account Management Page for Authorized Agents

The Account Manage page is the first page that an authorized agent sees after logging in to the Citizen Access (see [Figure 111: Account Management Page for the Authorized Agent](#)).

**Figure 111: Account Management Page for the Authorized Agent**

The screenshot shows the 'ON-LINE SERVICES' interface. At the top, there is a navigation bar with links for 'Cart (0)', 'Account Management', 'Locate Customer', and 'Logout'. Below the navigation bar, the main content area is titled 'Manage Your Account'. It displays account information for an 'Authorized Agent Account'. The 'Account Type' section shows the account type. The 'Login Information' section includes fields for 'User Name' (redacted), 'E-mail' (redacted), 'Password' (redacted with asterisks), and 'Security Question' ('What is the brand of your first car?'). The 'Contact Information' section shows a table with columns: Full Name, Action, First Name, Middle Name, Last Name, Business Name, SSN, and FEIN. The table has two rows of data, both redacted. The 'Clerks' section shows a table with columns: User Name, E-mail, Status, and Action. It has one row of data, which is also redacted. There is a link 'Add a Clerk' at the top right of the clerks table.

Authorized agents can perform the following two tasks in the page:

- Click the “Locate Customer” link on the top of the page to start the landing page of authorized service sales. For more information, see [Configuring the Authorized Service Sale Pages on page 419](#).

- Manage their accounts, and add and manage their authorized agent clerks.

You can customize the content of the web pages for account management by authorized agents.

#### To customize the account management pages for authorized agents and clerks

1. Navigate to **Citizen Access Setup** for Citizen Access.
2. Go to **Global Settings > Pages**.
3. Select and customize the following pages in the Account Management folder:
  - Account
    - This page contains two new sections, the Account Type section, and the Clerks section.
      - The Account Type section displays the account type of the login user.
    - 

The screenshot shows a table with one row labeled "Citizen Account". The table has four columns: "User Name", "E-mail", "Status", and "Action". A "Clerks" button is visible at the top right of the table area.

      - The Clerks section displays for the account management page of authorized agents only. This section provides the Add a Clerk button for adding clerk accounts, and the Action column, with the Activate or Deactivate link, for the agent to activate or deactivate a clerk account.

Clerks			
Showing 0-0 of 0			
User Name	E-mail	Status	Action

- New Clerk Registration

This page displays after an authorized agent clicks the Add a Clerk button in the Account Management page. There are two main sections, the Login Information section and the Contact Information section.

**New Clerk Registration**

\* indicates a required field.

<b>Login Information</b>	
* User Name:	(?) admin
* E-mail Address:	
* Password:	(?) [REDACTED]
* Type Password Again:	
* Select a Security Question:	(?) --Select--
* Answer:	(?) [REDACTED]
<b>Contact Information</b>	
Please provide basic contact information below.	
<b>Add New</b>	
<b>Continue Registration &gt;&gt;</b>	<b>Cancel</b>

- The Login Information section requires authorized agents to enter the basic login information about the new clerk.
- The Contact Information section provides the summary contact information of the clerk if the authorized agent already entered the information. Otherwise, the agent can click Add New to add the contact information.

- New Clerk Registered

This page is read-only and provides a summary of the clerk account information that the authorized agent just entered.

- Clerk Information

After an authorized agent clicks the link in the User Name column in the Clerks section of the Account Management page, this page displays and allows authorized agents to edit an existing clerk account.

Like the New Clerk Registration page, the Clerk Information page contains two main sections, the Login Information section and the Contact Information section. The sections display existing information about the selected clerk. Authorized agents can make changes to the information and then save.

The Contact Information section contains current contact information, in which some fields may be read-only to authorized agents, but are still subject to change. You can enable the Amendment button in the section by associating a record type filter with the

button. If authorized agents click the Amendment button, they can choose an amendment record type to apply for amending the contact.

Field Properties	
Name	Value
Default Label	Amendment
Button Label	Amendment
Record Type Filter	TEST FILTER

- **Select Contact Type**

When authorized agents click Add New to add contact information about a clerk, the Select Contact Type displays. Use it to select the contact type before entering the contact details.

- **Clerk Address Info**

The Clerk Address Info window displays when authorized agents click Add Additional Contact Address, or when they edit a contact address.

- New Clerk Info

After authorized agents select a contact type for a new clerk in the Select Contact Type window, the New Clerk Info window. Use it to add the clerk contact information.

The screenshot shows the 'New Clerk Information' window. At the top, there are fields for First Name, Middle, and Last names, each with a required asterisk. Below these are fields for Name of Business and Country (set to United States). There are also fields for Address Line 1, Zip, City, and State. Underneath these are fields for Home Phone, Work Phone, and Mobile Phone. A section titled 'Contact Addresses' contains an 'Add Additional Contact Address' button and a table for managing addresses. The table has columns for Address Type, Recipient, Address, Status, and Start. A message indicates 'Showing 0-0 of 0' and 'No records found.' At the bottom are 'Save and Close', 'Clear', and 'Discard Changes' buttons.

Be aware that there are two possible outcomes when authorized agents click the Save and Close button in the New Clerk Info window:

- If there are close matching reference contacts for the entered clerk, the New Clerk Info window changes to read-only mode, and displays the details of the first contact that meets the close matching criteria of the highest priority. The window also displays a check box with the message "I confirm the displayed contact as that of my clerk". If authorized agents mark the check box and click the Confirm button, Citizen Access saves the close-matching contact as the clerk, and returns to the Clerk Management window.
- If there is no close match, a new reference contact is created based on the entered contact information. Citizen Access saves the entered contact, and returns to the Clerk Management window.

When you configure the New Clerk Info page, remember to select the target contact type first if you want to customize the field settings. The customized settings only apply to the selected contact type. If you define the field settings without selecting any contact type, the Contact Info window displays the default field settings.

The screenshot shows the 'Contact Information' window. It includes fields for First Name, Middle, and Last names, each with a required asterisk. There are also fields for Birth Date (with a calendar icon), Gender (Female or Male radio buttons), and Individual/Organization (a dropdown menu with 'Select' placeholder). Below these are fields for Address Line 1 and Address Line 2.

- Edit Clerk Info

If the summary of a contact already displays in the Contact Information section of the Clerk Information or New Clerk Registration window, authorized agents can click the Edit link to edit the contact information. The Edit Clerk Info window displays.

**Note:** If you click the Edit link on a clerk which you added from a close match, the Edit Clerk Info window displays the contact information as read-only.

You can require authorized agents to add more details in this window in addition to what they already provided on the New Clerk Info window.

The screenshot shows the 'Edit Clerk Information' window. It includes fields for First Name, Middle, Last, Name of Business, Country (United States), Address Line 1, Zip, City, State, Home Phone, Work Phone, Mobile Phone, and Nationality (dropdown menu). Below these, there's a section for 'Contact Addresses' with a 'Add Additional Contact Address' button and a table for managing addresses. The table has columns for Address Type, Recipient, Address, Status, and Start. A message indicates 'Showing 0-0 of 0' and 'No records found.' At the bottom are 'Save and Close', 'Clear', and 'Discard Changes' buttons.

When you configure the Edit Clerk Info page, remember to select the target contact type first if you want to customize the field settings. The customized settings only apply to the selected contact type. If you define the field settings without selecting any contact type, the Contact Info window displays the default field settings.

The screenshot shows the 'Contact Information' window with a simplified set of fields. It includes First Name, Middle, Last, Birth Date (with a calendar icon), Gender (Female/Male radio buttons), and Individual/Organization (dropdown menu). There are also fields for Address Line 1 and Address Line 2.

4. Click **Save** to save your changes.

# Configuring the Authorized Service Sale Pages

Authorized agents and authorized agent clerks perform the following three tasks to process authorized service sales orders from customers.

- Step 1: Locate Customer.
- Step 2: Enter or Verify Customer Information
- Step 3: Conduct License Sale

You can configure the pages that display in the steps. Because Citizen Access currently only supports fishing and hunting license sales, you can only configure the pages for the fishing and hunting license sales.

## Topics

- [Configuring the Landing Page](#)
- [Configuring the Customer Details Page](#)
- [Configuring the License Sale Page Flow](#)

## Configuring the Landing Page

When an authorized agent clicks the “Locate Customer” link in the account management page, or when an authorized agent clerk logs in, the landing page displays for them to check the existence of the customer in the database. Authorized agents can enter the customer information to start a search.

### To configure the landing page

1. Navigate to **Citizen Access Setup** for Citizen Access.
2. Go to **Global Settings > Pages**.
3. Select and customize the Landing Page under Fishing & Hunting License Sales in the Authorized Services folder.

Enter New Customer Information'. A note below says '0 results found matching the lookup criteria.' and 'Click any of the results below to view more details.' A table header row is shown with columns: Full Name, Birth Date, Gender, Driver's License State, Driver's License Number, and Mobile Phone."/>

**Fishing and Hunting License Sales**

Step 1: Locate Customer > Step 2: Enter or Verify Customer Information > Step 3: Conduct License Sale

**Locate Customer**

Customer ID:

License ID:

First Name:

Last Name:

Date of Birth:

Mobile Phone:

Driver's License State:

Driver's License Number:

Enable soundex search on name fields

If none of the searched matches the customer information, you may [Enter New Customer Information](#).

**0 results found matching the lookup criteria.**  
Click any of the results below to view more details.  
Showing 0-0 of 0

Full Name	Birth Date	Gender	Driver's License State	Driver's License Number	Mobile Phone
-----------	------------	--------	------------------------	-------------------------	--------------

The landing page allows authorized agents or authorized agent clerks to either search for a customer, or click the “Enter New Customer Information” link to create a new customer. The customer search page only supports standard contact fields, and does not support people template and generic template fields.

Note that you can configure contact identifier fields in Civic Platform to forbid the agent or clerk from creating customers that conflict with existing contacts. If the customer information entered matches the identity of an existing customer, when the agent or the clerk clicks the “Enter New Customer Information”, the customer information page directly loads the information about the existing customer. If the customer information entered does not contain any identifier field value, Citizen Access prompts the agent or clerk to enter an identifier field first.

**Note:** *If an authorized agent or clerk locates a customer which already exists as a reference contact, even if the reference contact has a condition on it, the agent or clerk can still proceed with the authorized service sales.*

**Note:** *The landing page of authorized service sales only supports standard contact fields, and does not support people template and generic template fields.*

4. Click **Save**.

## Configuring the Customer Details Page

Authorized agents and clerks can enter or confirm the customer information in the Customer Details page. The page contains the detailed contact information about the customer, and the licenses that the customer has already purchased.

### To configure the customer details page

1. Navigate to **Citizen Access Setup** for Citizen Access, and go to **Global Settings > Pages**.
2. Select and customize the Customer Details page under Fishing & Hunting License Sales in the Authorized Services folder.

The screenshot shows the 'Customer Details' page with two main sections:

- Customer Details:** This section includes fields for Type (dropdown), Individual/Organization (dropdown), Gender (radio buttons for Female/Male), Date of Birth (text input with calendar icon), First Name, Middle Name, Last Name, Driver's License Number, and Driver's License State.
- Contact Addresses:** A table titled 'Add Additional Contact Address' with columns for Address Type, Recipient, Address, Status, and Start. It displays a message 'No records found.' and includes navigation arrows.
- Associated Licenses:** A table showing 0-0 of 0 records. It includes columns for Record Number, Record Type, Open Date, Expiration Date, Related Records, and Action. It features a checkbox for 'I have verified licensee details information.' and buttons for 'Proceed to New License Sale >>' and 'Relocate the Customer'.

There are two sections in the page, the Customer Details section and the Associated Licenses section, under which is the Proceed to New License Sales button.

- The Customer Details section shows the contact information, including the contact template fields and contact address information, about the customer. You can perform the following configurations for the section:
  - Set the entire Customer Details section to be editable or read-only.
  - Set applicable reference contact types for customers in the Type Options of the Type field.
  - Add or remove standard contact fields for the target contact type.
  - Set the display and required property of the fields.
  - Control whether the contact template fields are visible to authorized agents and clerks by configuring ASI security settings in Civic Platform.
- The Associated Licenses section lists all the licenses that the customer has purchased.

- You can enable an “Amendment” link in the Action column of a license with the existing Amendment Record feature. For information about the feature, see [Configuring Amendment Record Functionality on page 572](#).

**Note:** Because the record type filter that you select for the Create Amendment button in the Record Details page takes precedence over the filter that you configure in Module Settings, you must not select any filter in Record Details.

You can write scripts to populate the contact information in the current license into the amendment record. Remember to assign the scripts to the Onload Event property at the desired page in the target amendment page flow.

- The Proceed to New License Sale button leads users proceed to the license sale page. For more information, see [Configuring the License Sale Page Flow on page 422](#).
3. Select and customize the Contact Address Info page under Fishing & Hunting License Sales in the Authorized Services folder. The Contact Address Info window displays when authorized agents or clerks click Add Additional Contact Address, or when they edit a contact address, in the Customer Details page.
  4. Click **Save**.

## Configuring the License Sale Page Flow

If authorized agents or clerks click the Proceed to New License Sale button in the Customer Details page, they enter the license sale page flow. You must first configure the record types and record type filter for the authorized service, and then associate the record type filter to the license sale page flow in the Authorized Service Settings page (see [Configuring Authorized Service Settings on page 411](#)).

Be aware of the following points when you design the page flow:

- There is no disclaimer page in the license sale page flow.
- The page flow should include the contact types that you defined for the license sale record type.
- If you want the authorized agent or clerk to complete the customer information entry before starting the page flow for the record type, select the “Reference Only” data source for the contact section in the page flow. If you want to enable the authorized agent or clerk to update the customer information in the page flow for the record type, select the “No Limitation” data source for the contact section in the page flow.
- Unique with the license sale process, the auto-fill feature in the Applicant section enables authorized agents or clerks to auto fill the customer information entered in the Customer Details page.
- Citizen Access can skip the first contact page in the page flow if the following criteria are all met:
  - The agent or clerk starts the license sales page flow by clicking the Proceed to New License Sale button.

**Note:** If an agent or clerk clicks the Amend link to amend an existing license, Citizen Access does not skip the first contact page in the page flow, so that the agent or clerk has the ability to update the customer information in the contact page if needed. Because Citizen Access does not save changes in the Customer Details page when agents or clerks click the Amend link, it is advised not to make changes directly in the Customer Details page in the amendment scenario.

- The Customer Detail page is editable.
- The first contact page only contains one component: single contact component.
- The contact information in the Customer Detail page can pass the data validation required by the contact component in the page flow.
  - If the contact component in the page flow requires a primary contact address, Citizen Access sets the first active contact address in the Customer Detail page to primary.

Although Citizen Access skips the afore-mentioned contact page in the page flow, the review page and the completed record still contain the contact section, in which the contact information of the first contact is populated from the customer information in the Customer Detail page.

For more information on page flow configuration, see [Chapter 9: Page Flow Configuration on page 132](#).

## Enabling License Tag Printing

To enable an authorized agent and his clerks to print license tags for customers, you must perform the following configurations:

- Mark the Enable Client-side Printing option for the authorized agent account. For information about authorized agent account settings, including the Enable Client-side Printing setting, refer to the “Public Users” chapter in the *Accela Civic Platform Administrator Guide*.
- Configure the tag report in Report Manager. For information on configuring the tag report, see [Configuring a Tag Report on page 424](#).

When an agent or clerk who has client-side printing permission clicks the Print Tag button in an authorized service sale, the license tag report displays in a new window in Citizen Access.

## Configuring Authorized Service in Civic Platform

### Topics

- [Managing Authorized Agents](#)
- [Configuring a Tag Report](#)
- [Configuring Trust Accounts](#)

## Managing Authorized Agents

There are three public user types: Citizen, Authorized Agent, and Authorized Agent Clerk. You can create authorized agents in the public user portlet in Civic Platform. After you create an authorized agent account, remember to enable and activate it. You can enable and activate authorized agent accounts in the Registered Agencies tab of the public user portlet, the same way as you enable and activate citizen user accounts.

For more information about managing authorized agents, see the “Public Users” chapter in the *Accela Civic Platform Administrator Guide*.

## Configuring a Tag Report

Authorized agents or authorized agent clerks print license tags for their customers when completing an authorized service sale in Citizen Access.

You can configure the tag report in Report Manager with the following settings.

- Select the “Local Datamax-O’Neil E-Class Mark III Printer” option for the “Send to Printer” property. This option enables authorized agents and authorized agent clerks to print to their local printer. Citizen Access recommends Datamax-O’Neil E-Class Mark III Printer models for quality license tag printing.
- Select any available format as the output format. Currently the tag report only supports the PDF format.
- Set the “Reprint Limit on ACA” property of the report to forbid or limit the reprints of the tag report by the authorized agent or clerk in Citizen Access.
- Associate the tag report with the Print Tag button (portlet name: Button - ACA Print Tag) in the receipt page that displays in the page flow for authorized service records.

You can associate the tag report with another print button. Note that with any other print button, authorized agents or clerks cannot print the tag report to their local Datamax printer, and the “Reprint Limit on ACA” setting does not work.

For more information on configuring the report, see [Chapter 20: Reporting Information on page 472](#).

## Configuring Trust Accounts

In Civic Platform, you can associate one and only one trust account with an authorized agent. After you approve an authorized agent to use a trust account, when the agent or a clerk created by the agent conducts an authorized service sale, Citizen Access automatically deducts the due fees from the trust account. The authorized agent or the clerks are unaware of the trust account in use during the process. In Civic Platform, the trust account logs all the payments collected by the agent and the clerks created by the agent.

For more information on trust accounts, see the “Trust Accounts” chapter in the *Accela Civic Platform Administrator Guide*.

## CHAPTER 18:

# LICENSE VERIFICATION AND ONLINE RENEWAL

A license is a document, plate, or tag issued as proof of legal permission to work in a profession or own something. Many professional fields, such as engineering, medicine, and education, require that individuals obtain a specific level of education to become a licensed practitioner of the trade. In addition, a number of these occupations require that licensed professionals pursue regular continuing education to maintain their certification. For example, to perform work, an electrician needs an electrical license, a refrigerator repair man might need a mechanical license, a pharmacist must have a license to dispense medications with an additional requirement of continuing education to keep the license current, a business owner must have an operating license, and everyone who drives needs a drivers license.

To keep licenses current, licensed professionals can renew licenses through the agency and online through Citizen Access. Some licenses may require education, continuing education or a passing score on an exam. For more information on how to integrate education with the licensing process, see [Chapter 19: Certifications and Education on page 449](#). Citizen Access validates license information regularly so that only those registered public users with a valid license can perform tasks. This chapter provides all of those areas in Citizen Access where you can run validation scripts.

Because education is a pre-requisite for all renewals, you can configure the online renewal process independent of the education module. This chapter explains the online renewal process and verification tasks.

**Note:** *To set up the license verification, the online renewal, and the education functionality, the best practice is to refer to the implementation questions and tasks in [Renewing and Verifying Licenses on page 217](#) in [Chapter 11: Implementation Planning on page 201](#). The questions help you assess the record type features you want to make available to the public. [Configuring Required License Verification & Online Renewal Settings](#) provides a comprehensive configuration list for record processing functionality, including dependent settings outside of this Creating Records chapter.*

## Topics

- Managing License Verification
- Defining Expired License and Insurance Settings
- Configuring License Renewal
- Defining Licensing E-mail Functionality

## Managing License Verification

Civic Platform provides the ability to validate license, insurance, or other information against data at an external database by using a web service. For example, you can configure an EMSE script to validate the user license number and the expiration date against the license information stored at the state government office during the application process. You can also configure scripts to run the validation script in accordance to an event in the software, such as clicking the login button. When validations fail, an error message displays to the public user. See [Figure 112: OnLoginBefore Failed Validation Error Message on page 428](#) and [Figure 113: Error Message during Record Creation on page 431](#).

Citizen Access can capture license information in multiple areas within Citizen Access. So, you must configure the EMSE scripts to run in various places throughout Citizen Access for a complete and thorough implementation. The content of the EMSE scripts vary depending on which area of Citizen Access you are writing; however, each EMSE script contains the universal *ValidateLicense* script. The *ValidateLicense* script provides the code to call the external web service and exchange the packaged information about validation.

This section provides you with configurations for a complete implementation of this feature. It includes a complete listing the various areas of Citizen Access that incorporate licenses and provides the key components for validation setup in each area. Key components include EMSE templates, events, parameters, and the *ValidateLicense* script requirements to ensure proper functionality.

Begin configuration of this feature by writing the universal *ValidateLicense* script. Ensure you collect the web service information that you need to effectively communicate with the external database. This may include the parameters for license number or for expiration date from Civic Platform and the external data source.

For complete instructions on EMSE Events and Scripts, see the “Event Manager and Script Engine” chapter and the “Writing Scripts” chapter in the *Accela Civic Platform Scripting Guide*.

### Topics

- [Configuring the License Script to Call the Web Service](#)
- [Configuring OnLogin EMSE Scripts for Validation](#)
- [Validating a License During the Registration Process](#)
- [Validating a License when Creating a Record](#)
- [Validating During the Application Intake Process](#)
- [Verifying Licenses in Account Management](#)
- [Verifying Licenses during Login Process](#)

## Configuring the License Script to Call the Web Service

The *ValidateLicense* script contains the definitions to call the web service and exchange data in packets. Ensure you collect the web service information that you need to effectively communicate with the external database before writing the universal *ValidateLicense* script. This may include the parameters for license number or for expiration date from Civic Platform and the external data source. Each EMSE script that is used throughout Citizen Access to verify license information must contain this *ValidateLicense* script or the validation simply does not

work. Write, customize, and apply the following function for EMSE scripts associated with license validation. Follow the script template as described below.

#### Script template of function ValidateLicense (licenseNumber, licenseType)

```
{  
var client=aa.httpClient;  
var url="https://www4.cbs.state.or.us/ex/fred/permits/simplecall.cfc";  
client.addParameter("method", "lic_ok");  
client.addParameter("returnformat", "json");  
client.addParameter("p_lic_num", licenseType);  
var resultString=String(client.post(url).getOutput());  
//Convert to jsonObject  
var result=eval("(" +resultString+ ")");  
}
```

## Configuring OnLogin EMSE Scripts for Validation

Civic Platform provides the ability to set parameters for EMSE events configured to run at Citizen Access public user login. The two EMSE events are OnLoginBefore and OnLoginAfter. The Onlogin script feature requires the configuration of a script that defines the process as well as the text for the error message. The Onlogin scripts most often include the firing of the universal *ValidateLicense* script. This universal *ValidateLicense* script calls a web service to validate license information against data that an external database stores. For example, the *ValidateLicense* script might use a web service to call the state License board verifying the license number and the expiration date. If the state license board indicates the license is inactive, the script updates the license status in Civic Platform. For information about the *ValidateLicense* script, see [Configuring the License Script to Call the Web Service on page 426](#).

The time that the script is executed defines the two OnLogin script names. The clicking of the Login button triggers the OnLoginBefore script. Civic Platform runs the EMSE script before the username validation and password validation. The OnLoginAfter script runs after Civic Platform successfully runs the OnLoginBefore and user name/password validations. Both scripts use the AgencyCode, Language, and Username input parameters and the ReturnCode, ReturnMessage, ReturntoLogin output parameters. Implement these scripts for your agency by configuring the applicable EMSE result actions described below.

For the OnLoginBefore script, if the EMSE script validation fails and the status code (inactive status) in the EMSE requires to stop the login process, a message displays on the current page and the login process stops. Civic Platform updates the license status to inactive in Civic Platform. See [Figure 112: OnLoginBefore Failed Validation Error Message on page 428](#).

For both the OnLoginBefore or OnLoginAfter scripts, if the EMSE script validation fails and the status code in the EMSE does not require the login process to stop, Civic Platform displays a message to the public user on next page after the successful login. Civic Platform updates the status of the license to inactive in the Civic Platform database.

For both the OnLoginBefore or OnLoginAfter scripts, if the EMSE script validates successfully, then the user moves to next page without any error message display.

You may want to associate the OnLoginBefore or OnLoginAfter script to a page in the application intake process. This is particularly useful when a new applicant adds a license. Associate one of these scripts with a page during the intake process so license information is validated and the applicant can continue with the application. You associate an EMSE script to a page in the page flow configuration area of a module in Citizen Access Setup. For more information about how to configure scripts to a page in page flow, see [Associating Scripts with a Page on page 144](#).

**Caution:** Only experienced programmers or system administrators should use this feature. Improperly written scripts can adversely affect your system. The improperly written scripts may incorrectly alter or delete data for many records. Make sure you write custom scripts carefully and test them before you implement them.

For information on writing scripts and using the Event Manager and Script Engine tool, see the “Event Manager and Script Engine” chapter and the “Writing Scripts” chapter in the *Accela Civic Platform Scripting Guide*.

Figure 112: OnLoginBefore Failed Validation Error Message

The screenshot shows the Accela Citizen Access login page. At the top, there's a blue header bar with the text "ON-LINE SERVICES". Below it, the main content area has a title "Accela Citizen Access;" with a small icon. To the right, there are links for "Register for an Account" and "Login". A navigation menu at the top includes "Home", "Building", "Licenses", "Service Request", and "Public Works".

In the center-left, a red-bordered box contains the message: "Your license is expired or not valid. If this information is incorrect contact the agency." Below this message, under the heading "Please Login", there's a note: "Many online services offered by the City require login for security reasons. If you are an existing user, please enter your user name and password in the box on the right." Under "New Users", it says: "If you are a new user you may [register](#) for a free Citizen Access account. It only takes a few simple steps and you'll have the added benefits of seeing a complete history of applications, access to invoices and receipts, checking on the status of pending activities, and more."

To the right, there's a "Login" form with fields for "User Name or Email:" and "Password:", a "Login >" button, and checkboxes for "Remember me on this computer" and "I've forgotten my password". Below the login form, there's a link "New Users: Register for an Account". At the bottom left of the main content area, there's a "Register Now >" button.

### To access EMSE scripts

1. Navigate to **Civic Platform > Admin Tools > Event Manager > Scripts**.  
*Civic Platform displays the Scripts Search page.*
2. Enter the search criteria and click the **Submit** button.  
*Civic Platform returns any applicable results.*

3. If Civic Platform does not define the OnLoginBefore or OnLoginAfter scripts, click the **Add** button to write the new script(s).

*Civic Platform displays the Add New Script page.*

4. Complete the following fields:

<b>Script Code</b>	Enter the code or abbreviation that identifies the script.
<b>Script Title</b>	Enter the name or title of the script.
<b>Script Initializer</b>	If the script requires an initializer, enter it here. The initializer may be necessary to start certain scripts as well as contain certain input parameters.
<b>Script Content/Text</b>	<p>Enter the script text here. You can also copy and past a pre-written script into this text area. For a template of an example OnLogin EMSE script, refer to the script template below the table.</p> <p>Include the applicable input parameters in the script: AgencyCode, Language, and Username.</p> <p>Include the applicable output parameters in the script: ReturnCode, ReturnMessage, and ReturntoLogin.</p> <p>The two valid values are Y and N. If the value is Y, Citizen Access redirects the user back to the login page. If the value is N, then Citizen Access redirects the user to the page they requested.</p>

For information on writing scripts and using the Event Manager and Script Engine tool, see the “Event Manager and Script Engine” chapter and the “Writing Scripts” chapter in the *Accela Civic Platform Scripting Guide*.

5. Click the **Add** button.

#### **Script template of EMSE OnLogin:**

```
var username = aa.env.getValue( "Username" ) ;  
  
var publicUserModel =  
aa.publicUser.getPublicUserById(username).getOutput() ;  
  
var userSeqNum= publicUserModel.getUserSeqNum() ;  
  
var contractorLicenseList =  
aa.contractorLicense.getContrLicListByUserSeqNBR(userSeqNum).getOutput()  
();  
  
if (contractorLicenseList != "" && contractorLicenseList != null)  
{  
    for (var i=0; i< contractorLicenseList.size(); i++)  
    {  
        var LModel = contractorLicenseList.get(i);  
        var licenseNbr= LModel.getLicense().getStateLicense() ;
```

```
var licenseType= LModel.getLicense( ).getLicenseType( );

// validate the license (Invoke WS to validate the license)
var isValid = ValidateLicense(licenseNbr, licenseType);
if (!isValid)
{
    //sync the status in AA DB
    aa.licenseScript.updateLicenseStatusByTypeAndbr(licenseType,
    licenseNbr, "I");

    var returnCode = "-1";
    var returnMessage = "Your license (" + licenseNbr + ") is invalid.";
    aa.env.setValue("ReturnCode", returnCode);
    aa.env.setValue("ReturnMessage", returnMessage);
    break;
}
}
}
```

## Validating a License During the Registration Process

During the registration process, a public user may add a license to their new user account. Run the EMSE script to validate the license information. If the validation fails, display the prompt message returned from the EMSE script at the top of the license list. In order for this EMSE to function properly, you must write and bind the ValidateLicense function to AddLicenseValidation4ACA. For an example script, refer to the template below.

### To configure a validation EMSE to run during account registration

1. Navigate to **Civic Platform > Admin Tools > Event Manager > Scripts**
2. Write and bind the EMSE script to the **AddLicenseValidation4ACA** Event. See the script example below.

### Registration Process EMSE Validation Template

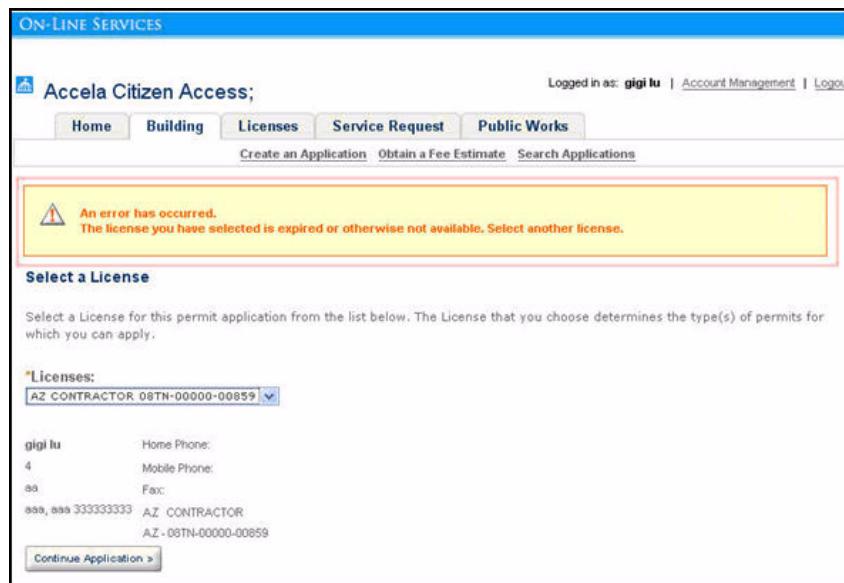
```
var LModel = aa.env.getValue("LicenseModel");
// validate the license (Invoke WS to validate the license)
var licenseNbr = LModel.getStateLicense();
var licenseType = LModel.getLicenseType();
var isValid = ValidateLicense(licenseNbr, licenseType);
```

```
// return the result of the validation.  
  
if (!isValid)  
{  
  
    var returnCode = "-1";  
  
    var returnMessage = "The license you have selected is expired or  
otherwise not available. Select another license.";  
  
    aa.env.setValue("ReturnCode", returnCode);  
  
    aa.env.setValue("ReturnMessage", returnMessage);  
}
```

## Validating a License when Creating a Record

Often the public user needs to select their license before the record type selection process when creating a record. The selected license may be validated during this process by EMSE. If validation fails, the prompt message returned from EMSE displays on the top of the current page. See [Figure 113: Error Message during Record Creation on page 431](#). Implement license validation by defining the ValidateLicense script and associate it to the SelectLicenseValidation4ACA Event. For an example script, refer to the template located in the instructions provided below.

**Figure 113: Error Message during Record Creation**



The screenshot shows a web-based application interface for 'ON-LINE SERVICES'. At the top, there's a header bar with the title 'Accela Citizen Access' and navigation links for Home, Building, Licenses, Service Request, and Public Works. Below the header, there are three buttons: 'Create an Application', 'Obtain a Fee Estimate', and 'Search Applications'. A prominent yellow warning box is displayed, containing a triangle icon and the text 'An error has occurred. The license you have selected is expired or otherwise not available. Select another license.' Below this, a section titled 'Select a License' asks the user to choose a license for a permit application. It includes a dropdown menu labeled 'Licenses' with the option 'AZ CONTRACTOR 08TN-00000-00859' selected. To the left of the dropdown, contact information for the user 'gigi lu' is listed: Home Phone (4), Mobile Phone (88), Fax (88), and Email (az.aaa.33333333). At the bottom of the form is a 'Continue Application >' button.

### To configure a validation EMSE to run during account registration

1. Navigate to **Civic Platform > Admin Tools > Event Manager > Scripts**
2. Write and bind the EMSE script to the **SelectLicenseValidation4ACA** event. See the script example below.

### Record Creation ValidateLicense Script Template

```
var LModel = aa.env.getValue("LicenseModel");
// validate the license (Invoke WS to validate the license)
var licenseNbr = LModel.getStateLicense();
var licenseType = LModel.getLicenseType();
var isValid = ValidateLicense(licenseNbr, licenseType);
// return the result of the validation.
if (!isValid)
{
    var returnCode = "-1";
    var returnMessage = "The license you have selected is expired or otherwise not available. Select another license.";
    aa.env.setValue("ReturnCode", returnCode);
    aa.env.setValue("ReturnMessage", returnMessage);
}
```

## Validating During the Application Intake Process

During the application process, the public user may input Licensed Professional information in the applicable Licensed Professional area of the application intake form. Any license information provided can be validated by EMSE. Implement this EMSE script by binding the validation script with the Page Flow BeforeEvent or AfterEvent. If validation fails, the error message displays on the related page. For information on associating a script to a page in Page Flow, refer to [Associating Scripts with a Page on page 144](#). For an example script, refer to the template provided in the instructions below.

### To configure a validation EMSE to run during account registration

1. Navigate to **Civic Platform > Admin Tools > Event Manager > Scripts**
2. Write an EMSE script to bind the ValidateLicense function to the Page Flow **BeforeEvent**. See the script example below. For more information about Page Flow Events, refer to [Associating Scripts with a Page on page 144](#).

### Application-Intake Page Flow ValidateLicense Script Template

```
var capModel = aa.env.getValue("CapModel");
var LPModel = capModel.getLicenseProfessionalModel();
// validate the license (Invoke WS to validate the license)
var licenseNbr = LPModel.getLicenseNbr();
var licenseType = LPModel.getLicenseType();
var isValid = ValidateLicense(licenseNbr, licenseType);
```

```
// return the result of the validation.  
  
if (!isValid)  
{  
  
var returnCode = "-1";  
  
var returnMessage = "The license you have selected or inputted is  
expired or otherwise not available. Select or input another license.";  
  
aa.env.setValue("ReturnCode", returnCode);  
  
aa.env.setValue("ReturnMessage", returnMessage);  
}
```

## Verifying Licenses in Account Management

A public user may add a license to their existing account information at any time. The license information can be validated by EMSE during this process. If license validation fails, the prompt message returned from EMSE script displays on the current page at the top of the license list.

In order for this EMSE to function properly, you must write and bind the ValidateLicense function to AddLicenseValidation4ACA Event. For an example script, refer to the template located in the instructions provided below.

### To configure a validation EMSE to run during account registration

1. Navigate to **Civic Platform > Admin Tools > Event Manager > Scripts**
2. Write and bind the EMSE script to the **AddLicenseValidation4ACA Event**. See the script example below.

### Account Management Validate License Script Template

```
var LModel = aa.env.getValue("LicenseModel");  
  
// validate the license (Invoke WS to validate the license)  
var licenseNbr = LModel.getStateLicense();  
var licenseType = LModel.getLicenseType();  
  
var isValid = ValidateLicense(licenseNbr, licenseType);  
  
// return the result of the validation.  
  
if (!isValid)  
{  
  
var returnCode = "-1";  
  
var returnMessage = "The license you have selected is expired or  
otherwise not available. Select another license.";  
  
aa.env.setValue("ReturnCode", returnCode);  
  
aa.env.setValue("ReturnMessage", returnMessage);
```

```
}
```

## Verifying Licenses during Login Process

Anytime a Citizen logs into Citizen Access, Civic Platform can validate a license relating to the user login information. You can do the verification by binding the ValidationLicense function in an EMSE script with the OnLoginAfter Event. For more information about Login EMSE scripts, refer to [Configuring OnLogin EMSE Scripts for Validation on page 427](#).

### To configure a validation EMSE to run during account registration

1. Navigate to **Classic Administration > Admin Tools > Event Manager > Scripts**.
2. Write and bind a script to event **OnLoginEventAfter4ACA**. See the script template below.

#### OnloginEventAfter4ACA Script Template

```
var username = aa.env.getValue( "Username" ) ;

var publicUserModel =
aa.publicUser.getPublicUserByUserId(username).getOutput() ;

var userSeqNum= publicUserModel.getUserSeqNum() ;

var contractorLicenseList =
aa.contractorLicense.getContrLicListByUserSeqNBR(userSeqNum).getOutput()
();

if (contractorLicenseList != "" && contractorLicenseList != null)
{
    for (var i=0; i< contractorLicenseList.size(); i++)
    {
        var LModel = contractorLicenseList.get(i);

        var licenseNbr= LModel.getLicense().getStateLicense();
        var licenseType= LModel.getLicense().getLicenseType();

        // validate the license (Invoke WS to validate the license)
        var isValid = ValidateLicense(licenseNbr, licenseType);
        if (!isValid)
        {
            //sync the status in AA DB
            aa.licenseScript.updateLicenseStatusByTypeAndNbr(licenseType,
            licenseNbr, "I");

        var returnCode = "-1";
    }
}
```

```
var returnMessage = "Your license (" + licenseNbr + ") is invalid.";  
aa.env.setValue("ReturnCode", resultCode);  
aa.env.setValue("ReturnMessage", returnMessage);  
break;  
}  
}  
}
```

## Defining Expired License and Insurance Settings

Your agency has the ability to set permissions to application types based on license or insurance status. This feature extends to Citizen Access so you can limit the availability of certain application types online to applicants. When you define permissions to application types based on a license or insurance status, you enable only the individuals or companies with a current license and proper insurance coverage access to view certain information or to proceed through an application.

Your agency can provide a service to remind stakeholders to keep the licenses current or maintain proper insurance coverage by enabling online notifications in Citizen Access or sending e-mail reminders to individuals or companies requiring license or requiring insurance renewal through Civic Platform.

### Topics

- [Defining Record Type, License Type & Insurance Expiration](#)
- [Configuring Online Expired License and Insurance Notifications](#)
- [Disabling Renewals for Expired Licenses](#)

## Defining Record Type, License Type & Insurance Expiration

You can configure Civic Platform to verify the status of a license type against a record type so that administrators can control both restrictions and permissions to information or to an application. This is particularly useful when a licensed professional has a license, business license, or insurance coverage that is expired. For example, in the State of New York, all general improvement contractors and home improvement contractors require a home improvement professional license (HIC) and proper insurance coverage at all times. Insurance includes Liability, Worker's Compensation, and Disability. Agencies in the State of New York must define a relationship between the building permits and the insurance type status and license type status so that only contractors with a current license and proper insurance coverage have access to building permits.

To define the record type and insurance/license type expiration relationship, you must set the related Function Identification (FID) 0320 License Verification to full access. This FID enables the functionality to set permissions and assign expired license types to application types in Civic Platform. Then, you must go to the license verification maintenance portlet and define the

insurance/license type relationships with record types. See [Figure 114: License Verification Maintenance Portlet on page 436](#). For detailed information on how to define the record type and license type expiration relationship, see “Managing Expired Licenses and Insurance Coverage Verification” in the “License Certifications and Education” chapter of the *Accela Civic Platform Administrator Guide*.

Finally, you can configure how Civic Platform handles expired license notification. For information on how to configure online notifications, see [Configuring Online Expired License and Insurance Notifications on page 436](#). For information on how to configure e-mail notifications through Civic Platform, see “Configuring Expired License Notifications” in the “License Certifications and Education” chapter of the *Accela Civic Platform Administrator Guide*.

**Figure 114: License Verification Maintenance Portlet**

The screenshot shows a table titled "License Verification Maintenance". The columns are: "Record Type", "License Professional Type", "Allow Expired License", "Allow Expired Insurance", and "Allow Expired Business License". There are five rows of data:

Record Type	License Professional Type	Allow Expired License	Allow Expired Insurance	Allow Expired Business License
Building/InspDemo/Insj	Architect	For ACA	For ACA	For ACA
Building/InspDemo/Insj	Contractor	For ACA	For ACA	For ACA
Building/Plumbing Perm	Civil Engineer	For Both	For Both	For Both
Building/Plumbing Perm	Civil Engineer	For ACA	For ACA	For ACA
	-----Select-----	None	None	None

## Configuring Online Expired License and Insurance Notifications

You can manage the license notification process by pre-defining which record types require licensed professional restrictions and configuring the related Standard Choices to enable online notifications. If you want to send e-mail notifications, then you must set up a batch job that scans Civic Platform for those expired licenses or insurance. Based on the results of the scan, Civic Platform send notifications to the stakeholder associated with the expired license or insurance by e-mail.

### To manage online notifications for expired license and insurance

1. As a pre-requisite, verify you set the Function Identification (FID) 0320 License Verification to full access. This FID allows a user to set permissions and assign expired license types to application types in Civic Platform.
2. Create relationships between record types and license types as instructed in [Defining Record Type, License Type & Insurance Expiration on page 435](#) or in “Managing Expired Licenses and Insurance Coverage Verification” in the “License Certifications and Education” chapter of the *Accela Civic Platform Administrator Guide*.
3. Define online notifications for expired licenses, business licenses and insurance. Configure ENABLE\_EXPIRED\_LICENSE Standard Choice with related Standard Choices Values to control expired license and insurance functionality as described below:

- a. Configure Standard Choices Values ENABLE\_EXPIRED to enable or disable expired license functionality. Yes enables the functionality. No disables it.

**Standard Choice**      ENABLE\_EXPIRED\_LICENSE

**Standard Choices Value**    ENABLE\_EXPIRED

**Value Desc**                "Yes" or "No"

- b. Configure ENABLE\_EXPIRED\_LICENSE Standard Choice with related Standard Choices Values ENABLE\_NOTIFY\_LICENSE\_EXPIRED\_AT\_LOGIN to enable the ability to notify licensed professionals of their expired license after logging in. Yes enables expired license online notifications. No disables them.

**Standard Choices Value**    ENABLE\_NOTIFY\_LICENSE\_EXPIRED\_AT\_LOGIN

**Value Desc**                "Yes" or "No"

- c. Configure ENABLE\_EXPIRED\_LICENSE Standard Choice with related Standard Choices Values ENABLE\_NOTIFY\_BUSINESS\_LICENSE\_EXPIRED\_AT\_LOGIN to enable the ability to notify licensed professionals of their expired business license after logging in. Yes enables expired business license online notifications. No disables them.

**Standard Choices Value**    ENABLE\_NOTIFY\_BUSINESS\_LICENSE\_EXPIRED\_AT\_LOGIN

**Value Desc**                "Yes" or "No"

- d. Configure ENABLE\_EXPIRED\_LICENSE Standard Choice with related Standard Choices Values ENABLE\_NOTIFY\_INSURANCE\_EXPIRED\_AT\_LOGIN to enable the ability to notify licensed professionals of their expired business license after logging in. Yes enables expired business license online notifications. No disables them.

**Standard Choices Value**    ENABLE\_NOTIFY\_INSURANCE\_EXPIRED\_AT\_LOGIN

**Value Desc**                "Yes" or "No"

For information on configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

4. If you want to enable e-mail notifications, you must customize the content of the e-mail notification EMAIL\_NOTICE\_LICENSE\_EXPIRED. For information on how to customize the content of e-mails, see the "Customizing Message Content" section in the "Display Settings" chapter of the *Accela Civic Platform Administrator Guide*.
  - You can configure the related Standard Choices BATCH\_JOB\_SERVICE\_CATEGORY and create a batch job for e-mail notifications for expired licenses or insurance and send out notifications in a group. For information on how to create a batch job, see the "Batch Engine" chapter in the *Accela Civic Platform Administrator Guide*.
5. If necessary, make modification to the display of the license expiration, insurance expiration, or business license expiration column on each Module Information page and Module License Search form. For details on how to display or hide fields or columns, see [Chapter 10: Working with Web Pages on page 160](#).

The screenshot shows the 'Building Information' form and the 'Section Properties' panel. The 'Building Information' form contains fields for Name of Business, Address Lines, City, State, Zip, P.O. Box, Primary Phone, Secondary Phone, Fax, Contractor's License #, and Contractor's Business Name. Below this is a 'Conditions' section with a table header row: Condition, Status, Severity, Applied Date, Effective Date, Expirat. A red box highlights the 'Section Properties' panel on the right, which lists available fields: License Number, License Type, License Expiration, Insurance Expiration, Name, Business License, Expiration, Contact Type, SSN, FEN, and Business Name. Another red box highlights the 'Conditions' table header row.

## Disabling Renewals for Expired Licenses

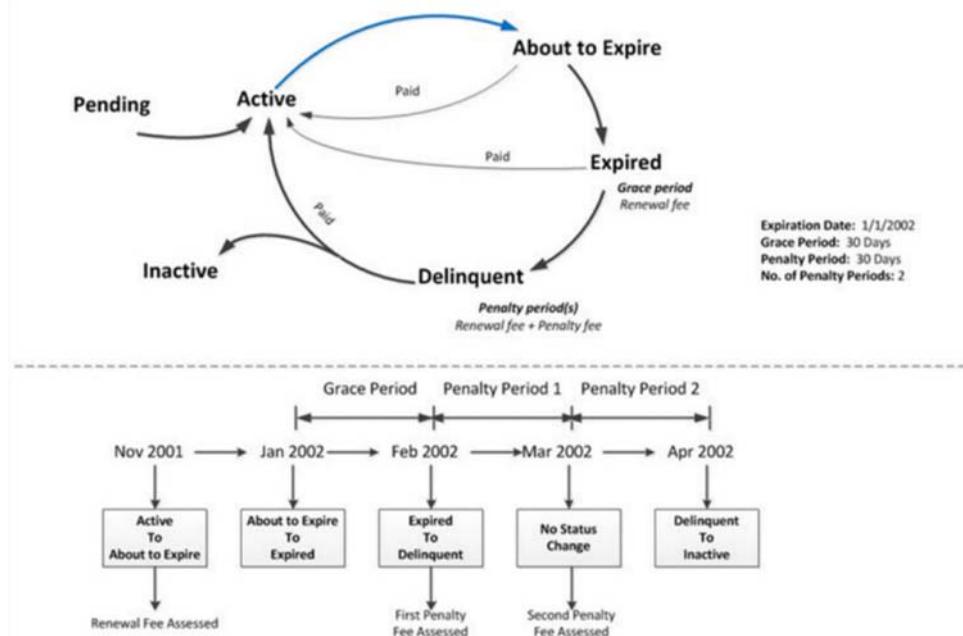
The release of Citizen Access 8.0 removes the renewal option from expired license records in Citizen Access. This enables agencies to enforce non-renewal for expired records.

As of 8.0, when a record's renewal status changes to Expired the renewal option no longer displays on the record and it is not available for renewal in Citizen Access. Agencies that use batch scripts to change license record statuses (About to Expire, Expired, and Delinquent) must modify these scripts to accommodate any grace and/or penalty periods before record statuses change to Expired.

### Topics

- [Creating a Batch Job to Automate License Renewal Statuses](#)
- [Modifying the Script for License Renewal Status Updates](#)

### License Renewal Life Cycle



## Creating a Batch Job to Automate License Renewal Statuses

An agency administrator or an Accela Services team member can create an EMSE script and a batch job (via Civic Platform Admin > System Tools > Batch Engine) to automate the process of changing license renewal statuses from Active to About to Expire, Expired, Delinquent or Inactive. These scripted status changes are described below.

### ■ Active

There are two possible scenarios for changing a license to an Active status:

- The license can be automatically renewed in Citizen Access after the citizen pays applicable renewal fees. The license status updates to Active.
- Automatic renewal is not implemented and an agency user must review and approve each renewal record in Civic Platform by completing a workflow. When the workflow is set to a specific status, an EMSE script triggers and sets the license status to Active.

### ■ About to Expire

The script runs according to the batch job parameters. It compares the expiration dates of all license records in your Accela implementation with the current date. If a license is due to expire in N number of days (configurable according to agency needs), the script automatically sets the license's status to About to Expire. When a license has an About to Expire status, the citizen can apply to renew the license in Citizen Access.

### ■ Expired

The batch job continues to run, comparing license expiration dates with the current date. If the current date is beyond the expiration date, the script sets the license status to Expired.

**NOTE:** Once a license's renewal status changes to Expired the renewal option no longer displays on the record and it is not available for renewal in Citizen Access.

- Delinquent (penalty phase)  
When a license expires and the citizen does not renew it, after a certain time period (configurable by the agency), the script changes the license status to Delinquent. You can configure multiple delinquency periods, during which additional fees for renewing a license accrue.
- Inactive  
After a certain period of non-renewal (configurable by the agency), the script changes the license status to Inactive.

## Modifying the Script for License Renewal Status Updates

As of 8.0, when a license status changes to Expired, the renewal option no longer displays on the record and it is not available for renewal in Citizen Access.

Because of this change, you may need to modify the script used for changing license renewal statuses to accommodate any grace and/or penalty periods before record statuses change to Expired.

Follow the steps below to modify the script used for automatically changing the license statuses in your Accela implementation from Active to About to Expire, Expired, or Delinquent.

### To modify the license renewal status script

1. Access the Civic Platform Classic Admin Script portlet (Classic Admin > Events > Scripts).
2. Locate the script you want to modify.
3. Using the sample diagram above as a guide, specify any grace and/or penalty periods you want to use for license renewal status updates.

Refer to the *Accela Civic Platform Scripting Guide* for full details about modifying scripts.

## Configuring License Renewal

Civic Platform offers solutions to renew licenses at the agency. If your agency implements Citizen Access, public users can renew licenses online. In either case, a license renewal can be initiated, all fees associated with that renewal can be paid, and the transaction completed for a license owner. This entire process can occur within the agency, online, or a combination of both. For example, a public user can start his business license renewal process by completing an application online. Then, he may come into the agency to provide supporting documents, pay the fees, and complete the transaction. Conversely, a customer can come into the agency to start the renewal process. Then, return home or to his business office to upload supporting documentation, attach it with their application, pay the fees online, and complete the transaction. Many times licenses require continuing education or a passing score on an exam to keep a license current. The Education, Continuing Education, and Examination components can also be implemented with the license renewal process to ensure all requirements are met before license issuance.

After configuring your agency to support license renewal, users can access an existing license and begin the renewal process. You can finish the configuration in the renewal portlet. Users access this portlet by clicking the Renewal tab relating to the parent license record. When the license status supports a need for renewal, such as expired, about to expire, or delinquent, a

Renewal button is available in the Renewal portlet. Users click that button to open an application intake form, beginning the renewal process as a child record to the parent license record. For more information on this process, refer to the "Licensing" chapter in the *Accela Civic Platform User Guide*.

License renewal requires numerous configurations for implementation. If your agency implements Education, Continuing Education, Examination, and extended functionality through Citizen Access, these components require additional configurations.

For basic implementation in Civic Platform, administrators must enable Functional Identification (FID) 8398 CAP Renewal and define the EMSE scripts to enable this feature. For information on writing scripts and using the Event Manager and Script Engine tool, see the "Event Manager and Script Engine" chapter and the "Writing Scripts" chapter in the *Accela Civic Platform Scripting Guide*.

**Note:** *If any of the events relates to more than one script, contact your Accela Services Implementation Specialist or the Accela Customer Response Center for technical assistance.*

To setup renewal functionality, administrators must define the renewal record type, expiration code, and the workflow associated with the renewal process. Administrators must do the setup for each parent record type requiring renewals. For example, an electrical license must have the initial electrical license type defined. This is the parent record type. The electrical license renewal must also have a record type defined. It operates as a child record to the parent record throughout the renewal process. For complete information on how to set up record types, see "Record Types" chapter in the *Accela Civic Platform Administrator Guide*. Some licenses require a specified amount of hours of additional classroom training or a passing score on an exam before the issuance of a license renewal. For information on how to set up the renewal process with Continuing Education and Examination, refer to [Chapter 19: Certifications and Education on page 449](#).

If your agency implements Citizen Access, administrators must set specific Fee Item settings for ACA Input Required, Auto Assess, and Auto Invoiced. Administrators must set up online payment processing to receive payments over the internet. Administrators must customize the associated Web pages. Lastly, depending on the agency implementation, you may need to approve a license relating to a public user through the Public User portlet in Civic Platform. For information on fees for Citizen Access, refer to [Chapter 15: Fees and Online Payments on page 358](#). For information on license approval in the Public User portlet, refer to [Approving or Rejecting a License on page 443](#).

### To configure license renewal

1. Log in to Civic Platform and click the Admin Tools tab.
2. Select a user group and enable the related Functional Identification number FID 8398 CAP Renewal.  
For details on enabling an FID, refer to the *Accela Civic Platform Configuration Reference*.
3. Define events. If any of these events relates to more than one script, contact your Accela Services Implementation Specialist or the [Accela Customer Response Center](#) for technical assistance.
  - ApplicationSubmitAfter

- PaymentReceiveAfter
  - WorkflowTaskUpdateAfter
  - Convert2RealCapAfter4Renew
4. Create an expiration code for the renewal process. This expiration code is assigned to the renewal record type. For additional instructions about expiration codes and about renewal processes, refer to the "Business License" chapter in the *Accela Civic Platform Administrator Guide*.
5. Define the record types for the parent license records and the child renewal records. For instructions on how to set up Record Type information, refer to the "Record Types" chapter in the *Accela Civic Platform Administrator Guide*. See also, [Configuring Record Type Settings on page 288](#).
- Verify the record type has the following list of supporting record type configurations defined and assigned:
- Enable for ACA
  - Renewal check box marked
  - Renewal Record Type defined and assigned
  - Fee Schedule with Fee Items configured for ACA display. See [Enabling Fees for Online Functionality on page 359](#).
  - Expiration Code
  - Workflow for Renewal
  - SmartChoice Group
  - ASI Group Code
  - Document Code, if applicable.
6. If your agency implements continuing education and examination, refer to [Chapter 19: Certifications and Education on page 449](#) for setup.
7. Customize the Renewal Receipt page. See [Customizing License Web Pages on page 442](#).
8. Customize the related e-mails. See [Defining License Renewal E-mails on page 447](#).

## Customizing License Web Pages

You must customize the Renewal Receipt page with the content you want to display to public users. This page displays after paying for fees relating to the renewal. See [Figure 115: Renewal Receipt Page on page 443](#). You can also use Report Manager to create a receipt report and assign it to the Print button on the page. For instructions, see [Associating Reports with Print/View Buttons on page 475](#). Refer to [Chapter 10: Working with Web Pages on page 160](#) for instructions on how to customize text and define the font, font color, and font size.

**Figure 115: Renewal Receipt Page**

The screenshot shows a web page with a navigation bar at the top containing links for Building Permits, Licenses, Service Request, Public Works, Home, and more. Below the navigation bar is a horizontal menu with links for Apply for a Permit, Obtain a Fee Estimate, Would you like to Search, and Schedule an Inspection.

The main content area contains three green boxes, each with a checkmark icon and text:

- Your license has been successfully renewed.  
Please print and retain a copy of this page for your records.
- Your application has been successfully submitted. Please allow 2-4 weeks for the application to be processed.  
Please print and retain a copy of this page for your records.
- Your application has been successfully submitted.  
Please complete the payment as soon as it becomes available. Please print and retain a copy of this page for your records.

Below these boxes, there is a message: "Thank you for using our online services. Your License Number is ."

Two informational messages follow:

- Your license has been successfully renewed. Please print and retain a copy of the license from this page.
- Your application for the renewal of this license has been successfully submitted. Please allow for 2-4 weeks of processing time. The license will be issued after the application is processed. You will be notified if any additional information is required.

At the bottom of the page are two buttons: "Print License" and "Print/View Receipt".

### To customize the Renewal Receipt page

1. Choose a module from the navigation panel.
2. Go to the Pages area and expand the module specific folder for applying for a record. For example, Apply for a Permit folder in the Building module.
3. Click the Renewal Receipt page from the list.  
*Citizen Access Setup displays the page in the center panel.*
4. Customize the page. For instructions, refer to [Associating Reports with Print/View Buttons on page 475](#) and [Chapter 10: Working with Web Pages on page 160](#).
5. Click **Save**.

## Approving or Rejecting a License

A licensed professional can add or renew license information relating to his account in Citizen Access. When a licensed professional submits a new license or a renewal online, an e-mail is sent to the agency indicating a license requires approval. After reviewing the license information, the agency can approve or reject the license.

This feature requires you to customize the content of the renewal and new license notification templates in Civic Platform, by navigating to **Civic Platform Administration > Setup > Communication Manager > Notification Templates**. Refer to the *Accela Civic Platform Administrator Guide* for complete details on customizing notification templates.

For more information about customizing the content of the e-mails, see [Chapter 7: Configuring Notification E-mails on page 100](#).

When administrators configure the e-mails, the agency can receive e-mail notification that a license requires approval. Follow the instructions below to approve or reject a license for an account.

#### To approve or reject a license

1. Navigate to **Admin > Setup > System Tools > PublicUser**.

*Civic Platform displays the public user portlet.*

2. Choose the Account which requires the license approval.
3. Click the **License** tab.

*Civic Platform displays a list of licenses that are pending, approved or rejected for the account.*

The screenshot shows two stacked windows of the Civic Platform Public User interface. The top window is titled 'Administration' and contains a table of accounts with columns for Email, First Name, Middle Name, Last Name, Business Name, State, City, Address, and Zip. Several rows are listed, including entries for ken.wang@..., ken.vu@..., ken.zhang..., ken.zhao@..., ken.ma@..., 00@achie..., test5@acc..., documenta..., and i.adminis... The bottom window is titled 'License' and contains a table of licenses with columns for License Number, License Type, License Status, Business Name, License State, License Issue Date, License Last Renewal Date, License Expiration Date, and First N. A single row is selected, showing license number 12345A, type ARCHITECT, status Pending, business name AMBER SMITH BUSINESS, state AZ, issue date 08/31/2009, and expiration date 08/31/2009. The 'Approve' button in the toolbar of the bottom window is highlighted with a red box.

4. Choose one of the following two options:

- Approve a license.
  - 1) Mark the check box(es) next to the license(s) that require approval.
  - 2) Click the **Approve** button.
- Reject a license.
  - 1) Mark the check box(es) next to the license(s) that do not meet license requirements.
  - 2) Click the **Reject** button.

*Civic Platform sends a confirmation e-mail to the account.*

## Defining Licensing E-mail Functionality

Citizen Access offers a way for agencies to communicate with public users by e-mail for licensing features. This section provides the e-mails relating to the licensing process including the addition to an account, removal from an account, license rejection, license approval, validation, and renewals.

Administrators must configure and customize the content and subject of e-mails by navigating to **Civic Platform > Administration > Setup > Communication Manager > Notification Templates**. Refer to the Communication Manager online help and the “Communication Manager” chapter of the *Accela Civic Platform Administrator Guide* for complete details on customizing notification templates.

This section provides you with the e-mails available for customizing and the related Standard Choices. Find the e-mail you want to customize by searching in the licensing, validation, or license renewals e-mail configuration sections.

If necessary, go to the Content Customize portlet in Civic Platform and choose the e-mail to customized based on the Standard Choice name. See the “Customizing Message Content” section in the “Display Settings” chapter of the *Accela Civic Platform Administrator Guide*.

### Topics

- [Configuring Licensing E-mails](#)
- [Configuring Validation E-mails](#)
- [Defining License Renewal E-mails](#)

## Configuring Licensing E-mails

Civic Platform sends the e-mails relating to licensing e-mails when an action is performed on a public user account. Administrators define all of the e-mails in Content Customize administration portlet of Civic Platform, and all the e-mails share the same subject Standard Choice for customizing, EMAIL ACA CONNECT LICENSE SUBJECT. Refer to the list below to learn more about the e-mails you want to customize for your agency. See the “Customizing Message Content” section in the “Display Settings” chapter of the *Accela Civic Platform Administrator Guide*. For information on configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

### Topics

- [Connecting an Approved License to a Public User](#)
- [Connecting a New License to a Public User](#)
- [Removing a License from a Public User](#)
- [Rejecting a License](#)

## Connecting an Approved License to a Public User

EMAIL ACA CONNECT LICENSE APPROVE USER

This e-mail is sent when an agency employee clicks the approve button. Navigate to the public user portlet, public user account, license tab in Civic Platform to access the e-mail. See [Approving or Rejecting a License on page 443](#).

## Connecting a New License to a Public User

EMAIL ACA CONNECT LICENSE CONNECT USER

This e-mail is sent when an agency employee adds a license to a public user account through the public user portlet in Civic Platform or a public user connects a license to their account in ACA.

## Removing a License from a Public User

EMAIL ACA CONNECT LICENSE DISCONNECT USER

This e-mail is sent to notify the public user when an agency employee removes a license from their public user account through the public user portlet in Civic Platform or when they remove it from their account in Citizen Access.

## Rejecting a License

EMAIL ACA CONNECT LICENSE REJECT USER

This e-mail is sent when an agency employee clicks the reject button. To access the email of rejecting a license, navigate to the public user portlet, public user account, license tab in Civic Platform. See [Approving or Rejecting a License on page 443](#).

## Configuring Validation E-mails

These e-mails relate to the license validation process, specifically when a license is added to one or multiple accounts.

Customize the appropriate e-mail notification template in Civic Platform, by navigating to **Civic PLATFORM > Administration > Setup > Communication Manager > Notification Templates**. Refer to the Communication Manager online help and the “Communication Manager” chapter of the *Accela Civic Platform Administrator Guide* for complete details on customizing notification templates.

For more information see [Defining License Notification E-mails on page 102](#).

### Topics

- [Associating License to Account](#)
- [Associating a License to Multiple Accounts](#)

## Associating License to Account

From: - ACA\_EMAIL\_TO\_AND\_FROM\_SETTING/  
ADD\_NEW\_LICENSE\_NOTICE\_CITIZEN\_MAILFROM

To: - \$\$userID\$\$

Cc: - N/A

This e-mail is sent to the agency to let them know that a license requires approval. It is sent after the public user or the agency employee associates a license to their account.

## Associating a License to Multiple Accounts

This e-mail is sent when public users associate a license to their account when the license also relates to another public user account. For example, a business owner may have the license associated to his account and also to the administrative assistant public user account.

From: ACA\_EMAIL\_TO\_AND\_FROM\_SETTING/  
ASSOCIATING\_LICENSE\_TO\_MULTIPLE\_ACCOUNTS\_MAILFROM

To: Initial and all association - E-mail is sent to all users associated to License number

Initial and current association - E-mail is sent to current user who adds the license and the first Citizen Access user to add the license.

No ACA Users: Do not send this e-mail - Standard e-mail rules apply.

## Defining License Renewal E-mails

You must configure the related license renewal e-mails. Customize the appropriate e-mail notification template in Civic Platform, by navigating to **Civic Platform > Administration > Setup > Communication Manager > Notification Templates**. Refer to the Communication Manager online help and the “Communication Manager” chapter of the *Accela Civic Platform Administrator Guide* for complete details on customizing notification templates.

These e-mails indicate communications between the public user and the agency when the agency receives an application, awaiting approval, declined, approved, and automatically issued.

### Topics

- [License Renewal \(Automatically Issued\) E-mail](#)
- [License Renewal \(Pending\)](#)
- [License Renewal \(Denied\)](#)
- [License Renewal \(Approved\)](#)
- [License Renewal \(New Application Notice\)](#)

## License Renewal (Automatically Issued) E-mail

From: - ACA\_EMAIL\_TO\_AND\_FROM\_SETTING/  
RENEW\_LICENSE\_AUTO\_ISSUANCE\_MAILFROM

To: - \$\$userID\$\$

Cc: - N/A

This e-mail is sent when a public user completes the application process for the license renewal. This only happens when you configure the license renewal record type for automatic issuance.

## License Renewal (Pending)

From: - ACA\_EMAIL\_TO\_AND\_FROM\_SETTING/  
RENEW\_LICENSE\_NO\_AUTO\_ISSUANCE\_PENDING\_MAILFROM

To: - \$\$userID\$\$

Cc: - N/A

This e-mail is sent when a public user completes the application process for the license renewal and is awaiting for approval by an employee at the agency. This only happens when you configure the license renewal record type for manual issuance (disable automatic issuance).

## License Renewal (Denied)

From: - ACA\_EMAIL\_TO\_AND\_FROM\_SETTING/  
RENEW\_LICENSE\_NO\_AUTO\_ISSUANCE\_DENIED\_MAILFROM

To: - \$\$userID\$\$

Cc: - N/A

This e-mail is sent when a public user completes the application process for the license renewal and is an employee at the agency rejected the license renewal by clicking the rejected button. This only happens when you configure the license renewal record type for manual issuance (disable automatic issuance).

## License Renewal (Approved)

From: - ACA\_EMAIL\_TO\_AND\_FROM\_SETTING/  
RENEW\_LICENSE\_NO\_AUTO\_ISSUANCE\_APPROVED\_MAILFROM

To: - \$\$userID\$\$

Cc: - N/A

This e-mail is sent when a public user completes the application process for the license renewal and an employee at the agency approves the license renewal by clicking the Approved button. This only happens when you configure the license renewal record type for manual issuance (disable automatic issuance).

## License Renewal (New Application Notice)

From: - ACA\_EMAIL\_TO\_AND\_FROM\_SETTING/  
RENEW\_LICENSE\_NEW\_APPLICATION\_NOTICE\_AGENCY\_MAILFROM

To: - ACA\_EMAIL\_TO\_AND\_FROM\_SETTING/  
RENEW\_LICENSE\_NEW\_APPLICATION\_NOTICE\_AGENCY\_MAILTO

Cc: - N/A

This e-mail is sent when a public user submits a license renewal application. This e-mail is sent from the agency to notify the public user that the agency receives the application.

## CHAPTER 19:

# CERTIFICATIONS AND EDUCATION

A license is a document, plate, or tag issued as proof of legal permission to work in a profession or own something. Many professional fields, such as engineering, medicine, and education, require that individuals obtain a specific level of education to become licensed practitioners of the trade. In addition, a number of these occupations require that licensed professionals pursue regular continuing education to maintain their certification. Acceptable scores on certification level exams are for demonstrate competence usage.

For example, to perform work, an electrician needs an electrical license, a refrigerator repair man might need a mechanical license, a pharmacist must have a license to dispense medications with an additional requirement of continuing education to keep the license current, a business owner must have an operating license, and everyone who drives needs a drivers license.

Citizen Access provides agencies with the ability to track the education, continuing education, and examination requirements for professional or occupational licensing, streamlining the credentialing process. Public users can schedule or reschedule an exam session. A scheduled exam session can be canceled. The agency can track education requirements for licensed professionals, display upcoming license renewal reminders, and examination providers can securely update the exam scores by uploading exam score file to the agency through Citizen Access.

## Topics

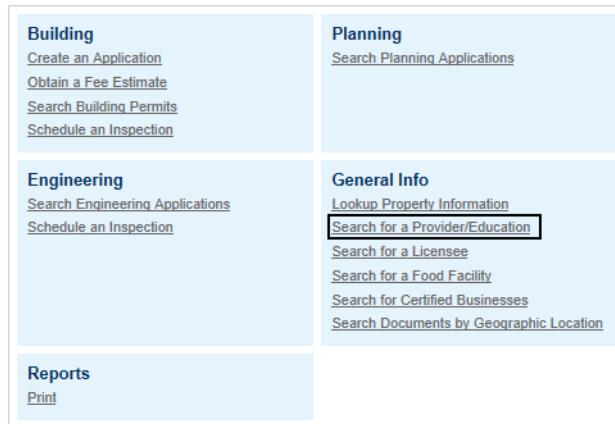
- Configuring the Search for Provider/Education
- Configuring Education
- Configuring Continuing Education
- Configuring Examinations

## Configuring the Search for Provider/Education

When activated, the Search for Provider/Education displays in a table on both the Citizen Access public user and registered user home pages, as shown in [Figure 116: Search for Provider/Education option on home page](#).

**Figure 116: Search for Provider/Education option on home page**

To get started, select one of the services listed below:



When the Search for Provider/Education option is enabled, public and/or registered users can look up provider information from your agency's website, and export the search results in Comma-Separated Value (CSV) format from the Provider or Education Detail page.

### Topics

- Activating the Search for Provider/Education Option
- Customizing the Search Results Detail Pages

## Activating the Search for Provider/Education Option

Configure the Search for Provider/Education option on the Feature Settings page in the Citizen Access General Settings area. This page defines the features you want to display to users who visit your website.

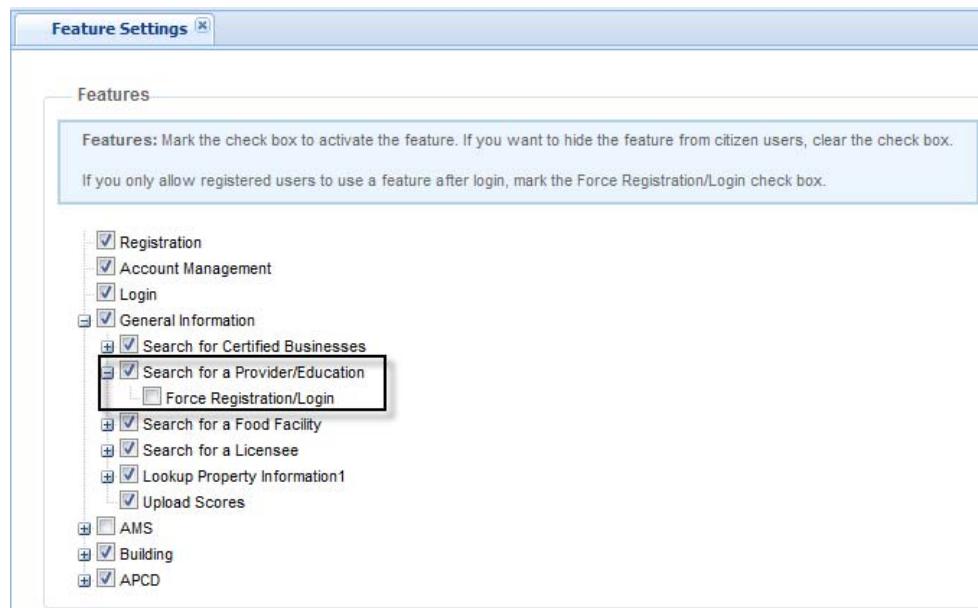
For more information on configuring Feature Settings, see [Chapter 5: Feature Settings Page on page 82](#).

### To configure the Search for Provider/Education option

1. Login to Citizen Access Setup.

2. From the General Settings area, select **Feature Settings**.

*Citizen Access displays the Feature Settings page.*



3. Expand the General Information item to display the list of options.
4. Mark the check box to display the **Search for Provider/Education**.
5. Optionally, mark the check box to **Force Registration/Login**. Be aware that if you mark this option, the Search for Provider/Education only appears on the Registered Public User home page, and not on the Non-Registered and Anonymous Public User home page. This option and the "Allow anonymous users to create:" setting jointly determine whether anonymous users can create records of specific record types in Citizen Access, or through deep links. For detailed settings on creating records by anonymous users, see [Table 15: Settings on Creating Records by Anonymous Users on page 452](#).
6. Click **Save**.
7. From the General Pages area, scroll down to locate the Provider/Education/Licensee Search pages, and select **Search for Provider/Education**.

*Citizen Access displays the Search for Provider/Education configuration page.*

8. Make any necessary changes to this page.
9. Click **Save**.

For information on activating search pages in Citizen Access, see [Chapter 5: Feature Settings Page on page 82](#). See also, [Chapter 10: Working with Web Pages on page 160](#) and [Chapter 13: Configuring Record Inquiry on page 243](#).

**Table 15: Settings on Creating Records by Anonymous Users**

Setting of Allow anonymous user to create	Setting of Force Registration/Login	How the Settings Work Together	
Creating Records through Deep Links	Creating Records in Citizen Access		
Yes	Selected		Anonymous users must log in before viewing the record type and creating the record.
Yes	Not Selected	Anonymous users can directly create the record.	Anonymous users can directly view the record type and create the record.
No	Any (Selected or Not Selected)	Anonymous users must log in before creating the record.	Anonymous users cannot view the record type in the record type list.
Null	Selected	Anonymous users must log in before viewing the record type and creating the record.	
Null	Not Selected	Anonymous users can directly view the record type and create the record.	

## Customizing the Search Results Detail Pages

You can customize the search results details that display to public users. After a public user enters the criteria for a provider search, Citizen Access returns a list of providers meeting that criteria with a list of education, continuing education and examination offerings they provide.

Similarly, results of education, continuing education, or examination searches display all offerings that meet the specific search criteria, together with a listing of those providers who offer them. This information displays on the Education Detail, Continuing Education Detail, or Examination Detail page corresponding to your search.

On the Examination Detail page, privileged public users can continue to search for exam sessions available for a specific examination and can view the exam session information.

You must customize each of these pages to display the education, continuing education, and examination content. For information on how to customize the content of a web page, see [Chapter 10: Working with Web Pages on page 160](#).

### To customize the search results detail pages

1. Log in to Citizen Access Setup.
2. From the General Pages area, scroll down to locate the **Provider/Education/Licensee Search** folder, under which you select the desired detail pages:
  - Provider Detail
  - Education Detail
  - Continuing Education Detail
  - Examination Detail
  - Provider Examination Detail

*Citizen Access displays the Provider Detail configuration page.*

3. Customize the content of the page as desired, and click **Save**.
4. Repeat [step 2](#) and [step 3](#) for each detail page you want to customize. For more information on modifying pages in Citizen Access, see [Chapter 10: Working with Web Pages](#) on [page 160](#).

## Configuring Education

Citizen Access provides the functionality to add the Education detail section to track education information about licensees in page flow. Citizen Access also supports searching for and manually entering education and provider records.

Configuring the education functionality for use in Citizen Access is a multi-step process:

- Create the necessary education provider records. For information on creating provider records and associating them with education offerings, refer to the "License Certifications and Education" chapter in the *Civic Platform Administration Guide*.
- Configure the Standard Choices and FIDs required for this feature and create the necessary Education records. For information on creating Education records, refer to the "License Certifications and Education" chapter in the *Civic Platform Administration Guide*.
- Add the Education component to individual pages, and then customize the information pages for each module to meet your agency's requirements for gathering education information.

After the configuration of the education feature, public and registered users can search for an education or provider, view it on the Review and Record Detail pages, and export the search results in Comma-Separated Value (CSV) format.

Additionally, registered users can use the search results to add or edit their education information on the application intake form.

### Topics

- [Adding Education to the Record Detail Page](#)
- [Adding the Education Component to a Page Flow](#)
- [Customizing the Education Section of a Module Information Page](#)
- [EMSE Scripting for Education Workflow](#)

## Adding Education to the Record Detail Page

You must define the display setting for education for each module enabled for Citizen Access on the Module Settings page. When you mark the display option, the Education section displays to public users on the Record Detail Page. This option also controls the display of the Education section on the license verification page when you click a license from the 'Search for Licenses' Search.

### To add Education to the record detail page

1. Login to Citizen Access Setup.

2. Select a module (such as Building).
3. From the General Settings area, select **Module Settings**.
4. From the **Record Detail Section Configuration** area, determine which user type has access to view Education and mark the applicable user roles to grant access. For more information, see [Record Detail Section Configuration on page 130](#).

Page Sections	All ACA Users	Registered Users	Record Creator	Contact	Owner	Licensed Profes...	Specific Licensed Profess...
Application and...	<input checked="" type="checkbox"/>						
Application and...	<input checked="" type="checkbox"/>						
Attachments	<input checked="" type="checkbox"/>						
Continuing Edu...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Education	<input checked="" type="checkbox"/>						
Examination	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fees	<input checked="" type="checkbox"/>						

OK Cancel

*Citizen Access displays the education section on the record detail page.*

Provider Name	Provider Number	Major Discipline	Degree	Year Joined	Year Graduated	Address 1
UC BERKELEY	09-PROVIDER-00002	ELECTRICAL ENGINEERING	MS	2002	2002	

## Adding the Education Component to a Page Flow

Adding the Education component to a module's page flow, such as for an application intake form, allows registered users to enter education details when completing an application.

### To add the Education section to a page flow

1. Login to Citizen Access Setup.
2. Select a module (such as Building).
3. From the Page Flow Configuration section, select **Page Flow Configuration**.
4. Select an existing page flow (such as an application intake or new permit form) from the drop down list; or click **Create a new Page Flow**, as desired.

*Citizen Access displays the Page Flow Configuration page for the selected module.*

*Civic Platform displays the Page Flow layout pages.*

5. From the Component Settings panel at right, drag the **Education** component to the desired location in the page flow.
6. With the component added to the page flow and selected, click the **Property** tab and modify the component properties as necessary.

Name	Value
Default Heading	Education
Custom Heading	Education
Editable	true
Required	true

7. Click **Save**.

*Citizen Access saves the page flow, and display it to users who navigate to that page on your agency's Citizen Access website.*

For additional information about working with page flows, refer to [Chapter 9: Page Flow Configuration on page 132](#).

## Customizing the Education Section of a Module Information Page

After you have added the education component to a module page, you may want to customize it to meet your agency's data capture needs. You can define a generic form layout for the Education section that applies to all education subjects, or define a unique form layout for a specific subject. The Education form may contain a set of template fields, if your agency administrator defined it in the Standard Choice or in the Education administration portlet. For information on templates, see the Standard Choice DEFAULT\_TEMPLATE in the *Accela Civic Platform Configuration Reference* and "Creating an Education Record" in the *Accela Civic Platform Administrator Guide*. For information on customizing module pages, see [Chapter 10: Working with Web Pages on page 160](#).

### To customize the Education section of a module information page

1. Login to Citizen Access Setup.
2. Select a module to which you have added the Education component (such as Licenses).

- From the **Pages** section, select the module information page.

*Citizen Access displays the module information page for the selected module.*

- Scroll to the Education section of the page.

- To customize a generic form layout for Education, choose "-select-" from the drop-down list next to the section title.

- To customize a unique form layout for a specific subject, choose an option from the drop-down list. For instance, Dance.

- Modify the page elements as desired. For information on customizing module pages, see [Chapter 10: Working with Web Pages on page 160](#).

- Click **Save**.

*Citizen Access applies the settings you specified.*

## EMSE Scripting for Education Workflow

There are three EMSE scripts that the Accela services implementation staff can reference when building scripts for education. The scripts allow you to trigger the license renewal process.

The available EMSE scripts are:

- ApplicationSubmitAfter
- PaymentReceiveAfter
- WorkflowTaskUpdateAfter
- EducationUpdateAfter

**Caution:** *Trained administrators must rewrite scripts in collaboration with an Accela Implementation specialist. Improperly written scripts can seriously damage your system by incorrectly altering or deleting data for many records*

**Note:** *For information on writing scripts and using the Event Manager and Script Engine tool, see the “Writing Scripts” chapter and the “Event Manager and Script Engine” chapter in the Accela Civic Platform Scripting Guide.*

## Configuring Continuing Education

Citizen Access provides the functionality to add the Continuing Education section so that Citizen Access can track appropriate fields for Continuing Education experience and history.

Configuring the continuing education functionality for use in Citizen Access is a multi-step process:

- Create the necessary continuing education provider records. For information on creating provider records and associating them with continuing education offerings, refer to the “License Certifications and Education” chapter in the *Civic Platform Administration Guide*.
- Configure the Standard Choices and FIDs required for this feature and create the necessary education records. For information on creating continuing education records, refer to the “License Certifications and Education” chapter in the *Civic Platform Administration Guide*.
- Add the Continuing Education component to individual pages, and then customize the information pages for each module, to meet your agency’s requirements for gathering continuing education information.

After the configuration of the continuing education feature, registered users can add or edit their continuing education information on the application intake form, or view it on the Review and Record Detail pages.

Registered user can search for a continuing education or provider, and use this information to populate the application intake form. Registered users can also export the search results in Comma-Separated Value (CSV) format.

### Topics

- Adding Continuing Education to the Record Detail Page
- Adding the Continuing Education Component to a Page Flow
- Customizing Continuing Education Section of Information Page
- EMSE Scripting for Continuing Education Workflow

## Adding Continuing Education to the Record Detail Page

When you mark the display option, the Continuing Education section displays to users on the Record Detail Page. This option also controls the display of the Continuing Education section on the license verification page when you click a license from the Search for Licenses search.

### To add Continuing Education to the record detail page

1. Login to Citizen Access Setup.
2. Select a module (such as Building)
3. From the General Settings area, select **Module Settings**.
4. From the **Record Detail Section Configuration** area, determine which user type has access to view continuing education and mark the applicable user roles to grant access. For more information, see [Record Detail Section Configuration on page 130](#).

Page Sections	All ACA Users	Registered Users	Record Creator	Contact	Owner	Licensed Profes...	Specific Licensed Professi...
Application and...	<input checked="" type="checkbox"/>	<a href="#">Configure</a>					
Application and...	<input checked="" type="checkbox"/>	<a href="#">Configure</a>					
Attachments	<input checked="" type="checkbox"/>	<a href="#">Configure</a>					
Continuing Edu...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Configure</a>
Education	<input checked="" type="checkbox"/>	<a href="#">Configure</a>					
Examination	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Configure</a>
Fees	<input checked="" type="checkbox"/>	<a href="#">Configure</a>					

OK      Cancel

ACA displays the Continuing Education section on the record detail page.

Summary of Continuing Education			
Total Required Hours: 20			
Continuing Education Name	Required Hours	Completed Hours	Remaining Hours
Electrical Engineering	20	10	10

▼ Continuing Education List

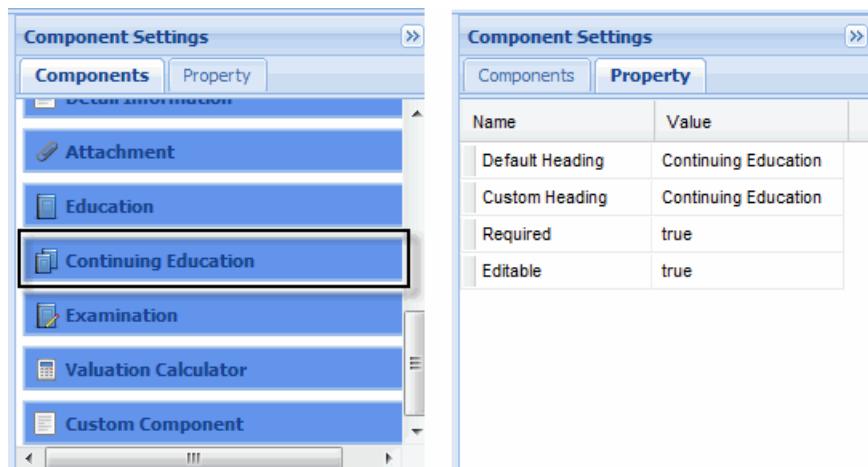
Continuing Education Name	Required	Provider Name	Provider Number	Class	Completed Hours	Final Score
Electrical Engineering	Yes	Yale University	BJ2008001	1101 Engineering	10	93%

## Adding the Continuing Education Component to a Page Flow

Adding the Continuing Education component to a module's page flow, such as for an application intake form, allows registered users to enter continuing education details when completing an application.

### To add the Continuing Education section to a page flow

1. Login to Citizen Access Setup.
2. Select a module (such as Building).
3. From the Page Flow Configuration section, select **Page Flow Configuration**.  
*Citizen Access displays the Page Flow Configuration page for the selected module.*
4. Select an existing page flow (such as an application intake or new permit form) from the drop down list; or click **Create a new Page Flow**, as desired.  
*Civic Platform displays the page flow layout pages.*
5. From the Component Settings panel at right, drag the **Continuing Education** component to the desired location in the page flow.
6. With the component added to the page flow and selected, click the **Property** tab and modify the component properties as necessary.



7. Click **Save**.

*Citizen Access saves the page flow, and display it to users who navigate to that page on your agency's Citizen Access website.*

For additional information about working with page flows, refer to [Chapter 9: Page Flow Configuration on page 132](#).

## Customizing Continuing Education Section of Information Page

After you have added the Continuing Education component to a module information page, you may want to customize it to meet your agency's data capture needs. You can define a generic form layout for the Continuing Education section that applies to all continuing education subjects or degrees, or define a unique form layout for a specific subject or a specific degree. The Continuing Education form may contain a set of template fields, if your agency administrator defined it in the Standard Choice or in the Continuing Education administration portlet. For information on templates, see the Standard Choice DEFAULT\_TEMPLATE in the *Accela Civic Platform Configuration Reference* and "Creating a Continuing Education Record" in the *Accela Civic Platform Administrator Guide*. For information on customizing module pages, see [Chapter 10: Working with Web Pages](#) on page 160.

### To customize the Continuing Education section of a module information page

1. Login to Citizen Access Setup.
2. Select a module to which you have added the Continuing Education component (such as Licenses).
3. From the **Pages** section, select the module information page.

*Citizen Access displays the module information page for the selected module.*

The screenshot shows the 'Licenses Information' page in the Accela Civic Platform. The 'Continuing Education' section is selected. On the right, the 'Section Properties' pane shows settings for the 'Continuing Education' section, including its label and instructions. The 'Available Fields' pane lists various fields like 'Continuing Education Name', 'Provider Name', and 'Address 1' with checkboxes for visibility and required status.

4. Scroll to the Continuing Education section of the page.
  - To customize a generic form layout for Continuing Education, choose "-select-" from the drop-down list next to the section title.



- To define a unique form layout for a specific subject or a specific degree, choose an option from the drop-down list. For instance, MBA1.
5. Modify the page elements as desired. For information on customizing module pages, see [Chapter 10: Working with Web Pages on page 160](#).
6. Click **Save**.

*Citizen Access applies the changes.*

## EMSE Scripting for Continuing Education Workflow

Civic Platform uses workflow tasks to track the successful completion of continuing education requirements so that the professional license renewal process can proceed to the next task. The workflow process assigned to the record type is defined upon the creation of the record type. For more information on configuring continuing education for workflow, see "License Certifications and Education" in the *Accela Civic Platform Administrator Guide*. For more information on workflow, refer to the "Workflow" chapter in the *Accela Civic Platform Administrator Guide*.

An EMSE script is a prerequisite for triggering the workflow status task. There are three events that the Accela services implementation staff can reference when building scripts for continuing education. The events allow you to trigger the license renewal process.

The available events are:

ApplicationSubmitAfter

PaymentReceiveAfter

WorkflowTaskUpdateAfter.

**Caution:** *Trained administrators must rewrite scripts in collaboration with an Accela Implementation specialist. Improperly written scripts can seriously damage your system by incorrectly altering or deleting data for many records*

**Note:** *For information on writing scripts and using the Event Manager and Script Engine tool, see the "Writing Scripts" chapter and the "Event Manager and Script Engine" chapter in the Accela Civic Platform Scripting Guide.*

# Configuring Examinations

Citizen Access (ACA) provides the functionality to add the Examination detail section to track examination information about licensees.

Configuring the examination functionality for use in Citizen Access is a multi-step process:

- Create the necessary examination provider records. For information on creating provider records and associating them with examination offerings, refer to the “License Certifications and Education” chapter in the *Civic Platform Administration Guide*.
- Configure the Standard Choices and FIDs required for this feature and create the necessary examination records. For information on creating examination records, refer to the “License Certifications and Education” chapter in the *Civic Platform Administration Guide*.
- Configure the Standard Choice EXAM\_CSV\_FORMAT required to allow an examination provider to upload score files. For information on configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.
- Add the Examination component and then customize the information pages for each module, to meet your agency’s requirements for gathering Examination information.
- Enable the auto-update examination functionality as necessary. see [Examination Setting on page 76](#).
- Customize the pages associated with examination. For instructions, see [Chapter 10: Working with Web Pages on page 160](#). From the module **Pages** area, scroll down to locate the **Examination** folder, under which, you select the desired pages:
  - Select Examination
  - Examination Time and Location
  - Examination Confirmation (Internal)
  - Examination Confirmation (External Online)
  - Examination Confirmation (External On Site)
  - Schedule Successful
  - Examination Detail
  - Cancellation Examination Reason
  - Reschedule Examination Reason

After the configuration of the examination feature, registered users can add or edit their examination information in the application intake form. After creating an examination application, public users can schedule exam session on the Record Detail page, where they can also reschedule or cancel an scheduled exam session.

Registered users can search for provider and examination information, and use that information to populate the Examination section of the application intake form. Registered users can also export the search results in Comma-Separated Value (CSV) format.

Providers can batch update the exam scores by uploading the exam score file to Civic Platform through Citizen Access. The exam scores file must contain the columns and be in the format specified in the Standard Choice EXAM\_CSV\_FORMAT. Enabling the auto-update examination functionality in the Global Settings page is the prerequisite for batch updating exam scores. For

detailed information on how to enable the auto-update examination functionality, see [Examination Setting on page 76](#).

It is recommended best practice to implement the examination feature using this section together with the “Managing Examination” section in the “License Certifications and Education” chapter in the *Accela Civic Platform Administrator Guide*.

### Topics

- [Adding Examinations to the Record Detail Page](#)
- [Adding the Examination Component to a Page Flow](#)
- [Customizing Examination Section of Information Page](#)
- [EMSE Scripting for Examination Workflow](#)
- [Configuring Examination for CSV Score Upload](#)

## Adding Examinations to the Record Detail Page

When you select the display option, the Examination section displays to users on the Record Detail Page. This option also controls the display of the Examination section on the license verification page when you click a license from the “Search for Licenses” search.

### To add Examination to the record detail page

1. Login to Citizen Access Setup.
2. Select a module (such as Building)
3. From the General Settings area, select **Module Settings**.
4. From the **Record Detail Section Configuration** area, determine which user type has access to view examination and mark the applicable user roles to grant access. For more information, see [Record Detail Section Configuration on page 130](#).

Record Detail Section Configuration

Restrict who can view which sections in record detail page: Choose among Anonymous Users, Registered Users, Record Creator, Contact, Owner, and Licensed Professional.

Role Assignment for Record Detail Page Sections							
Page Sections	All ACA Users	Registered Users	Record Creator	Contact	Owner	Licensed Profes...	Specific Licensed Professi...
Application and...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Application and...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Attachments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Continuing Edu...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Examination	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**OK** **Cancel**

ACA displays the examination section on the record detail page.

**▼ Examination**

**Schedule an Examination**

**Pending (11)**

GCSE_2011 Semester	<b>Required</b>	<a href="#">Actions</a> ▾
Date and Time:	Undefined	
Located at	Undefined	
Provider:	Undefined	
HOME	<b>Required</b>	<a href="#">Actions</a> ▾
Date and Time:	Undefined	
Located at	Undefined	
Provider:	Undefined	
ISA Certified Arborist, Utility Specialist, and Municipal Specialist Exam	<b>Required</b>	<a href="#">Actions</a> ▾
Date and Time:	Undefined	
Located at	Undefined	
Provider:	Undefined	
Professional Engineer (PE)	<b>Required</b>	<a href="#">Actions</a> ▾
Date and Time:	Undefined	
Located at	Undefined	
Provider:	Undefined	

[<Prev](#) [1](#) [2](#) [3](#) [Next>](#)

## Adding the Examination Component to a Page Flow

Adding the Examination component to a module's page flow, such as for an application intake form, allows registered users to enter examination details when completing an application.

### To add the Examination section to a page flow

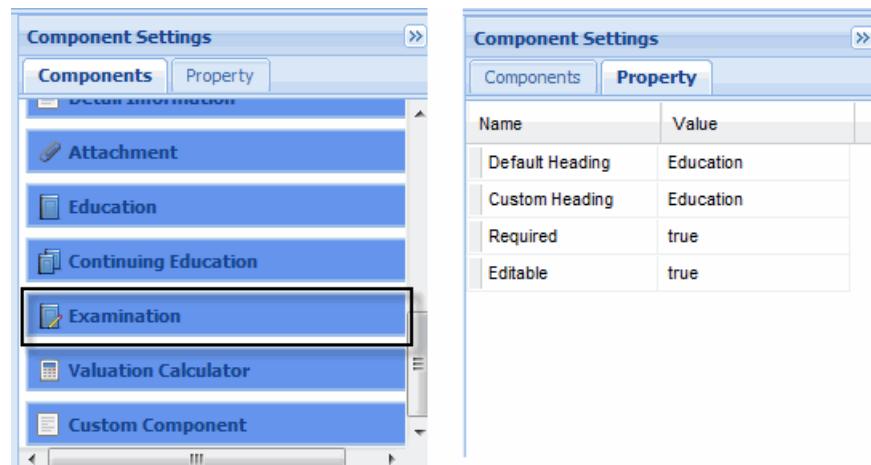
1. Login to Citizen Access Setup.
2. Select a module (such as Building).
3. From the Page Flow Configuration section, select **Page Flow Configuration**.

Citizen Access displays the Page Flow Configuration page for the selected module.

4. Select an existing page flow (such as an application intake or new permit form) from the drop down list; or click **Create a new Page Flow**, as desired.

*Civic Platform displays the Page Flow layout pages.*

5. From the Component Settings panel at right, drag the **Examination** component to the desired location in the page flow.
6. With the Component added to the Page Flow and selected, click the **Property** tab and modify the component properties as necessary.



7. Click **Save**.

*Citizen Access saves the page flow, and displays it to users who navigate to that page on your agency's Citizen Access website.*

For additional information about working with page flows, refer to [Chapter 9: Page Flow Configuration on page 132](#).

## Customizing Examination Section of Information Page

After you have added the Examination component to a module page, you may want to customize it to meet your agency's data capture needs. You can define a generic form layout for the Examination section that applies to all the subjects, or define a unique form layout for a specific examination subject. The Examination form may contain a set of template fields, if your agency administrator defined it in the Standard Choice or in the Examination administrator portlet. For information on templates, see the Standard Choice DEFAULT\_TEMPLATE in the *Accela Civic Platform Configuration Reference* and "Creating an Examination Subject" in the *Accela Civic Platform Administrator Guide*. For information on customizing module pages, see [Chapter 10: Working with Web Pages on page 160](#).

### To customize the Examination section of a module information page

1. Login to Citizen Access Setup.
2. Select a module to which you have added the Examination component (such as Licenses).

- From the **Pages** section, select the module information page.

*Citizen Access displays the module Information page for the selected module.*

Name	Value
Default Label	Examination
Section Label	Examination
Section Instructions	<a href="#">Click to Edit</a>

**Available Fields**

Field	Visible	Required
Examination Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Provider Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Provider Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Examination Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Final Score	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address 3	<input checked="" type="checkbox"/>	<input type="checkbox"/>
City	<input checked="" type="checkbox"/>	<input type="checkbox"/>
State	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Country	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Zip Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Phone Number 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Phone Number 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Fax	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Scroll to the Examination section of the page.

- To customize a generic form layout for Examination, choose "-select-" from the drop-down list next to the section title.

**Examination**

Here is the instruction for the Examination section.

**Examination List**

Examination added successfully. Examination removed successfully. Examination updated successfully. Failed to add examination. Failed to remove examination. Failed to update examination.

Showing 0-0 of 0

Examination Name	Required	Provider Name	Provider Number	Examination Date
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- To define a unique form layout for a specific examination subject, choose an option from the drop-down list. For instance, Chinese1.

- Modify the page elements as desired. For information on customizing module pages, see [Chapter 10: Working with Web Pages](#) on page 160.

- Click **Save**.

*Citizen Access applies the settings you specified.*

## EMSE Scripting for Examination Workflow

Civic Platform uses workflow tasks to track the successful completion of examination requirements so that the professional license application or the renewal process can proceed to

the next task. The workflow process assigned to the record type is defined upon the creation of the record type. For more information on configuring continuing education for workflow, see “License Certifications and Education” in the *Accela Civic Platform Administrator Guide*. For more information on workflow, refer to the “Workflow” chapter in the *Accela Civic Platform Administrator Guide*.

EMSE scripts are prerequisites for triggering the workflow status task. You can also write scripts. So Civic Platform can use the scripts to send e-mail confirmation notification to the examinees or any parties concerned after certain actions relating to examination is performed. There are eight events that the Accela services implementation staff can reference when building scripts for examination. Use the events to trigger the license renewal process or to send e-mail confirmation notification. Agency administrators must configure the e-mail templates in Civic Platform and refer to the template names in the scripts so that the e-mails include a corresponding template when Civic Platform fires an event. For detailed information on how to configure e-mail templates, see the “Notification Templates” chapter in the *Accela Civic Platform Administrator Guide*.

The events are:

ApplicationSubmitAfter

PaymentReceiveAfter

DocumentUploadAfter

ExminationupdateAfter

ExaminationBatchUpdateByCSVAfter

ExaminationRosterUpdateAfter

ExminationSiteUpdateAfter

WorkflowTaskUpdateAfter

**Caution:** Trained administrators must rewrite scripts in collaboration with an Accela Implementation specialist. Improperly written scripts can seriously damage your system by incorrectly altering or deleting data for many records.

**Note:** For information on writing scripts and using the Event Manager and Script Engine tool, see the “Writing Scripts” chapter and the “Event Manager and Script Engine” chapter in the *Accela Civic Platform Scripting Guide*.

## Configuring Examination for CSV Score Upload

Before you can create an examination record, you must configure the Standard Choice EXAM\_CSV\_FORMAT. The values you define for this Standard Choice determines the parameters required to create a CSV file that can be used to upload examination scores from associated examination providers.

In addition, you must also enable the CSV upload functionality within Citizen Access, and customize the necessary e-mail templates for use in verifying the scores received. See [Examination Setting on page 76](#) to learn how to enable the auto-update examination

functionality. See the “Notification Templates” chapter in the *Accela Civic Platform Administrator Guide* to learn how to configure e-mail templates.

## Topics

- [Defining the Examination Score CSV Upload File Parameters](#)
- [Enable CSV Score Upload](#)
- [Customize Confirmation E-mail Notification Templates](#)

## Defining the Examination Score CSV Upload File Parameters

The license certification examination function allows your agency to receive exam scores directly from the testing provider, record those scores, and apply them to the requirements for licensed professionals seeking to obtain or renew their professional licenses.

The values defined for the EXAM\_CSV\_FORMAT Standard Choice determine the column titles required in the CSV upload file that examination providers use to upload test scores into Civic Platform. You must communicate these parameters to the examination providers to ensure the test scores are properly uploaded and applied for each licensed professional record. For information on creating a Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

### To define the Examination Score CSV upload file parameters

1. Log in to Civic Platform and navigate to the Civic Platform portlet.
2. Click the **Admin Tools** tab.
3. Choose **Agency Profile > Standard Choices**.  
*Civic Platform displays the Standard Choices search page.*
4. Configure the Standard Choice EXAM\_CSV\_FORMAT as described below. For information on creating a Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.
  - The default values are predefined to correspond to the Column Title labels to be used when creating the CSV Examination Upload file, as listed in [Table 16: Values for Standard Choice EXAM\\_CSV\\_FORMAT on page 469](#). You may modify these values as required.

**Table 16: Values for Standard Choice EXAM\_CSV\_FORMAT**

<b>Standard Choice Value</b>	<b>CSV File Column Title</b>	<b>Description</b>
AGENCY	COLUMN=Agency	<p>Agency column name - is customizable. The column value is the code of the agency that a record belongs to.</p> <p><b>Note:</b> <i>Education providers can upload exam scores for the applications that belong to a sub-agency from the main agency's Citizen Access site. Administrators must configure this Standard Choice value so the agency code column in a score CSV file can correctly show the name for the agency that each application belongs to. If the Standard Choice value is not enabled or configured properly, the agency code column always displays the name of the main agency.</i></p> <p><i>You can only add this Standard Choice value for the main agency in a multiple-agency administration.</i></p>
ALTID	COLUMN = Alt(ernate) ID	Record ID column name - is customizable.
DATE	COLUMN = Date TYPE = Date FORMAT = MM/dd/yyyy)	<p>Date column name, column type, and format definition.</p> <p>Column name is customizable.</p>
EXAM_NAME	COLUMN = Exam name	Exam name column name - is customizable.
GRADING_STYLE	COLUMN =Grading Style TYPE=Enum FORMAT = none passfail score percentage	<p>Grading Style column name; column type and format definition.</p> <p>Grading Style column name is customizable.</p> <p>Enumerate TYPE element is customizable.</p>
PROVIDER_NAME	COLUMN = Provider name	Provider name column name - is customizable.
PROVIDER_NBR	COLUMN = Provider number	Provider number column name - is customizable.
SCORE	COLUMN = Score	Score column name - is customizable.
PASSING_SCORE	COLUMN=Passing Score	Passing score column name - is customizable.

**Note:** *Use caution when modifying these values. If your agency has previously provided examination providers with the column title information necessary for creating the CSV Examination Upload files, Civic Platform notifies the agency administrators if any changes are made so that they can make the corresponding modifications to their CSV files. Civic Platform cannot interpret uploaded CSV files that do not use the column title labels as defined in this Standard Choice.*

5. Ensure that the **Status** option is set to **Enable**.

6. Click **Update**.

*Civic Platform updates any changes and enables the CSV Examination Upload functionality.*

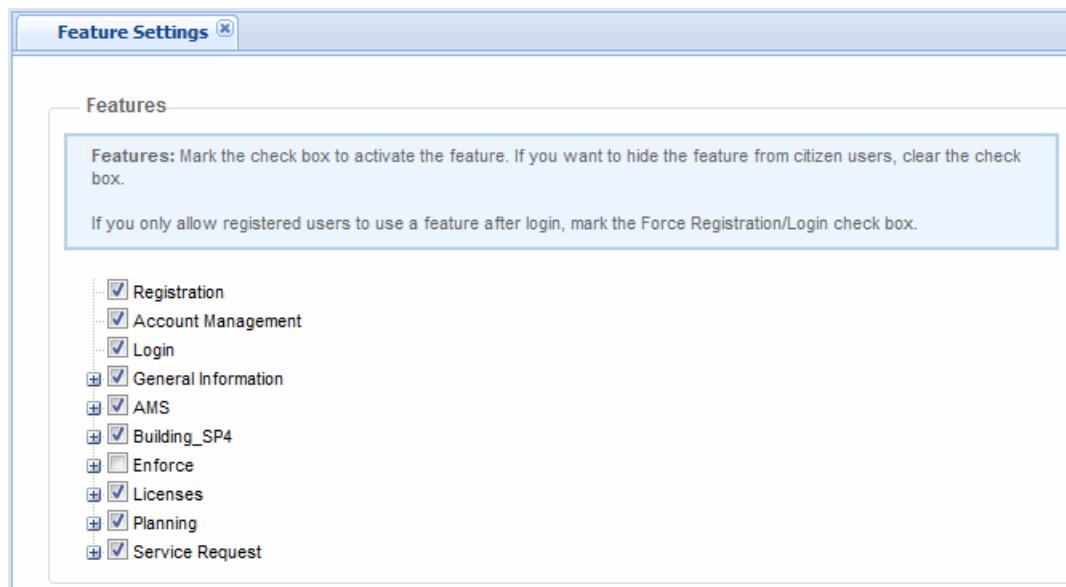
## Enable CSV Score Upload

When the upload scores functionality is enabled, examination providers can upload the CSV file of scores directly from your agency's Citizen Access website.

### To enable CSV score upload

1. Login to Citizen Access Setup.
2. From the General Settings area, select **Feature Settings**.

*Citizen Access displays the Feature Settings page.*



3. Expand the General Information item to display the list of options.
4. Mark the check box to display the **Upload Scores**.
5. Click the **Save** button.

## Customize Confirmation E-mail Notification Templates

When a provider uploads examination scores, Citizen Access automatically sends a confirmation e-mail to both the agency and the provider to confirm receipt of the scores. You can customize the templates for each of these e-mails, as required.

### To customize confirmation e-mail notification templates

1. Navigate to **Civic Platform > Administration > Setup > Communication Manager > Notification Templates**.

2. Select the e-mail template you want to customize. The templates provided for use with examinations are **Scores Update (to Agency)** and **Scores Update (to Provider)**.
3. Modify the template as required.
4. Click **Save**.
5. For detailed information on how to configure e-mail templates, see the “Notification Templates” chapter in the *Accela Civic Platform Administrator Guide*.

## CHAPTER 20:

# REPORTING INFORMATION

To enable public users to access reports from Citizen Access, administrators must perform the following tasks:

- Configure which reports are available to public users globally, modularly, and on individual Citizen Access web pages. Administrators can create reports specific to Citizen Access and add them to Report Manager. This is a pre-requisite for report setup for Citizen Access. For assistance on how to create a report, contact your Accela implementation specialist.
- Define viewable permissions for the various user groups using the website. You can assign permissions within applicable areas of Citizen Access through Citizen Access Setup.

**Note:** *Permissions to view reports defined for public users in Citizen Access Admin override any permission settings in Civic Platform.*

When reporting launches in Citizen Access, it provides administrators and public users with similar reporting functionality offered in Civic Platform. This includes: RTF and URL reporting, support for parameter and variable configurations, support for user defined parameter reporting, and support to display reports for multiple records in a single window or multiple windows. For a list of parameters available for Citizen Access reporting, see [List 11: ACA Parameter Types on page 480](#). If parameters are unavailable, Citizen Access displays the parameter page to manually gather parameter information at the time a public user runs the report.

Limitations to Citizen Access reporting functionality include: the inability to support the 'Default Format' output form (it poses a security risk), the inability to support manual-fill e-mail address functionality, the inability to support CLIENT\_EXE report, and inability to save to EDMS and/or the display of empty values when Civic Platform cannot get variable information from the session.

Civic Platform provides your agency with internal reports about your Citizen Access website, such as a Web Usage Statistics Summary Report. Any user with administrative rights can upload these reports for Accela Report Writer, Crystal, and MS SQL Server.

### Topics

- [Configuring Report Manager for Citizen Access](#)
- [Setting Report Viewable Permissions](#)
- [Sending Reports to Public Users by E-mail](#)
- [Configuring Multiple Agency Functionality](#)

# Configuring Report Manager for Citizen Access

This section provides information on how administrators configure Report Manager for reporting functionality in Citizen Access. This includes how to add a report to Report Manager, how to expose reports to the report list in ACA, how to assign reports to the Print/View buttons for each module, and how to configure parameters for reports.

When assigning reports to the report list in ACA, administrators can filter which reports are available to public users globally, modularly, and on individual ACA web pages. For example, administrators can configure the Permit report to display globally for all modules on the Report List located on the Home page, the Administrative Citation report to display in the Reports list on web pages in the Enforcement module, and the Corrections Notice report to display only in the Report list on the Record Detail page in the Enforcement module. You can do the assignment by defining viewable permissions for each report. After completing the Report Manager configurations tasks, see [Setting Report Viewable Permissions on page 481](#) to define viewable permissions in Citizen Access Setup.

## Topics

- [Adding a Report to Report Manager](#)
- [Associating Reports to the Report Link](#)
- [Associating Reports with Print/View Buttons](#)
- [Configuring Parameters for Reports in ACA](#)

## Adding a Report to Report Manager

This section provides an overview of how the Report Manager configuration tasks expose reports to Citizen Access. In this scenario, the Permit Receipt Report is used for reference in describing how to do this. For detailed instructions on how to use Report Manager, refer to the “Report Manager” chapter of the *Accela Civic Platform Administrator Guide*.

### To set up permit reports in Citizen Access

1. Verify all pre-requisite tasks are complete. This includes pre-defining reports and setting up a report service for ACA. For instructions, see the “Setting Up Report Services” section in the “Report Manager” chapter of the *Accela Civic Platform Administrator Guide* or contact your Accela Implementation Specialist.
2. In Report Manager, navigate to the **Menu** button and select **New Report** to create a report for Citizen Access, such as the Permit Receipt report.
3. Complete the **Report Detail** field information as described in [List 9: ACA Report Detail Field on page 473](#) and click **Submit**.

#### List 9: ACA Report Detail Field

<b>Category</b>	Use the drop-down list to select the appropriate category for the report. This category is used to organize and display the report for the user in the Reports portlet or from form and list portlets.
<b>Default Printer</b>	Do NOT send to a printer.

**List 9: ACA Report Detail Field**

<b>Description</b>	Enter a description of the report.
<b>EDMS</b>	Not applicable for ACA permit reports.
<b>EDMS Object</b>	Not applicable for ACA permit reports.
<b>Include on Report Portlet</b>	Not applicable for ACA permit reports.
<b>Name</b>	Enter the name that displays for the report.
<b>Output Format</b>	Choose PDF.
<b>Report Link</b>	Choose the link for this report. If you use the picker to choose the link for this report from the list. You must submit the report before this link is available. To choose the link, mark the option and click the <b>Select</b> button.
<b>Report Service</b>	Use the drop-down list to select the report service you created in step one for the report.
<b>Save to EDMS</b>	Do NOT save to EDMS.
<b>Send to Printer</b>	Do NOT send the ACA report to the printer.

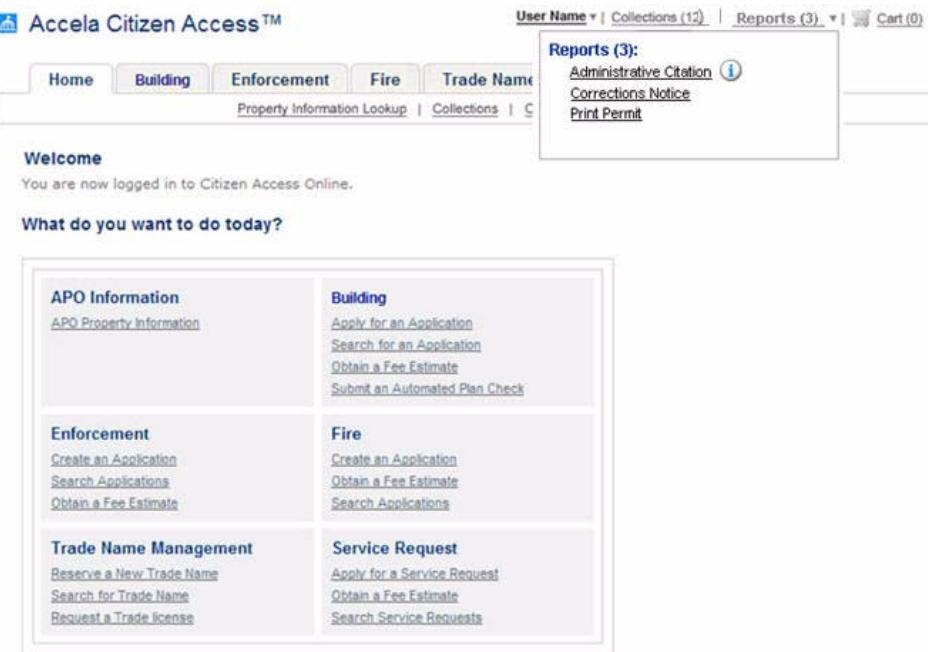
## Associating Reports to the Report Link

After adding reports to Report Manager, administrators define which reports are available to public users in ACA. You can do it by assigning reports to the report list. See [Figure 117: Public User View of Reports Link on page 475](#). Administrators can filter the available reports on this link by defining viewable permissions for the various public users at a global, modular, and individual web page level.

To expose reports to the reports list for ACA, administrators assign reports to the portlet “Link: ACA Reports List” in Report Manager. The Report List link displays in ACA to public users when an administrator assigns at least one report to the report link portlet in Report Manager.

Administrators can also use Report Manager to specify criteria for an ACA report in the Portlet Settings area. You can do it by clicking the **Create Criteria** link and completing the criteria fields for the report. For example, you can use the Record Detail fields in the Field Name drop-down list to define criteria for a report. When the defined criteria are met on a page, the report is available in ACA. If the defined criteria are not met on a web page, the report does not display in ACA. For more information about portlet settings in Report Manager, refer to the “*Report Manager*” chapter in the Accela Civic Platform Administrator Guide.

Figure 117: Public User View of Reports Link



#### To associate a report to the report link:

1. Click the **Admin** primary tab.
2. In the **Setup** portlet, click **Report** and choose **Report Manager** from the drop-down menu.  
*Civic Platform displays the Report Manager portlet.*
3. Select a report from the menu.  
*Civic Platform populates the report details.*
4. Click the **Portlets** tab and expose the report to ACA.
  - a. Choose **Link: ACA Reports List** in the Portlet Name drop-down list.
  - b. If necessary, click the **Create Criteria** link to specify any special criteria for the report.  
*For more information about creating criteria or report field definitions, use Report Manager administrator portlet. To use this portlet, refer to the “Report Manager” chapter in the Accela Civic Platform Administrator Guide.*
5. Click **Submit**.

## Associating Reports with Print/View Buttons

Citizen Access provides public users with buttons to print reports or view reports associated with an application, such a detailed receipt or a summary. You can allocate a report to each button for each record type for each module by assigning the report to the button and defining report criteria definitions on the Portlet tab in Report Manager. For example, your agency may

want the electrical permit report and a building permit report available on a Print/View button for a public user within the Building module. Administrators configure Civic Platform to display the right report for the applicable record type by defining the report criteria. Therefore, the electrical permit report has defined criteria for it to display on the Print/View button for an electrical permit and the building permit report displays for the building permit.

Administrators can also assign reports to display by record type in a specific language for the module through criteria definitions on the Portlet tab in Report Manager. This is particularly useful if your agency provides multi-lingual services. For information on configuring language preferences for reports in Citizen Access, see the *Civic Platform Internationalization Installation and Administrator Guide*.

To set up this feature, administrators must define which report relates to each button. Available buttons include: **Print/View Record**, **Print/View Receipt**, **Print/View Requirement** and **Print/View Summary**. Administrators must also define report criteria so that when a public user clicks a button, the right report displays. Public users view these buttons on the Record Detail page, Receipt page, or Fee Estimate page for each module in Citizen Access. See [Figure 118: Print/View Buttons on the Record Detail Page on page 477](#), [Figure 119: Print/View Buttons on the Receipt Page on page 477](#), and [Figure 120: Print/View Requirement Button on the Fee Estimate Page on page 478](#). If your agency is part of a network of agencies who work together to provide services to an area, refer to [Configuring Multiple Agency Functionality on page 484](#) for instructions on how to set up Citizen Access to accommodate multiple agencies.

Civic Platform provides administrators with the ability to assign reports to the Print/View buttons. These reports have set parameters automatically passed to Civic Platform, see [Table 17: Pre-defined Report Parameter Details on page 480](#). Administrators can add additional parameters to a report on the parameter tab in Report Manager configuration.

**Note:** Additional parameters assigned in the Parameter tab area are passed to these specific reports after the pre-defined parameters pass to the report. See [Configuring Parameters for Reports in ACA on page 479](#) for more information.

**Figure 118: Print/View Buttons on the Record Detail Page**

The screenshot shows a web-based application interface for managing records. At the top, there is a horizontal navigation bar with tabs: Home, Building, Planning, Enforcement, and Service Request. Below this, there are three links: Apply for an Application, Obtain a Fee Estimate, and Search for an Application. The main content area is titled "Record :" and contains several sections:

- Record Details**: This section includes fields for "Applicant" (set to "Licensed Professional") and "Work Location". It also has a "Select Supervisor" button and a note: "(Select supervisor for each License Professional)".
- Owner**: This section includes a "More Details" link and three buttons: Print/View Record, Print/View Receipt, and Print/View Summary.
- Fee**: This section has a "Create Amendment" button.
- Inspections**: This section is currently collapsed.

**Figure 119: Print/View Buttons on the Receipt Page**

The screenshot shows a receipt page with a similar header and navigation bar as Figure 118. A prominent green box at the top displays a success message: "Your application has been successful. Please print your permit and retain a copy for your records." Below this message, the text "Thank you for using our online services." and "Permit Number: PRTL-00000-02119." is displayed. A note below the permit number states: "You will need this number to check the status of your application or to schedule/check results of inspections. Please print a copy of your permit and post it in the work area." At the bottom of the page are three buttons: Print/View Record, Print/View Receipt, and Print/View Summary. A "View Permit Details" button is located at the very bottom.

Figure 120: Print/View Requirement Button on the Fee Estimate Page

The screenshot shows a sequence of four steps: Step 1, Step 2, Step 3, and Step 4. Step 3 is highlighted in yellow and labeled "Pay Fees". Below the steps, there is a section titled "Step 3: Pay Fees" with the following text:  
Listed below are preliminary fees based upon the information you've entered. Some fees are based on the quantity of work items installed or repaired. Enter quantities where applicable. The following screen will display your total fees.  
[Print/View Requirements](#)

**Application Fees**

Fees	Qty.	Amount
payment	0	\$0.00
new pirod	2	\$200.00

**TOTAL FEES**  
Note: This does not include additional inspection fees which may be assessed later.

\$200.00  
[Recalculate](#)

[Continue Application »](#)

### To configure the Print/View report buttons

1. Navigate to Report Manager in Civic Platform.  
*Civic Platform displays the Report Manager navigation tree and the detail screen.*
2. Select the report you want to assign to a button. If the report does not exist in the tree, add it to Report Manager. See [Adding a Report to Report Manager on page 473](#).  
*Civic Platform displays the report details.*
3. Click the **Permissions** tab and make the report available to the module public user group for the module Print/View Report button. For example, “BuildingPublicUser”.
4. Click the **Portlets** secondary tab.  
*Civic Platform displays the selected report's portlet page listing each portlet assignment.*

5. Click the **New** button to assign the report to a new portlet.

*Civic Platform displays the portlet detail page.*

The screenshot shows a software interface for managing report portlets. At the top, it says "Report Name: Permit Print". Below that is a toolbar with "Submit", "Reset", "Cancel", and "Help" buttons. There are also tabs for "Report Detail", "Parameters", "Permission", "Portlets", and "Workflow". The main area contains four dropdown menus: "Portlet Name\*", "Module\*", "Display\*", and "Description". The "Portlet Name\*" dropdown has "-Select--" selected. The "Module\*" and "Display\*" dropdowns both have "-Select-" selected. The "Description" field is a large text area containing a single vertical bar character.

6. Complete the portlet field information as described in [List 10: Report Manager Portlet Fields on page 479](#).
7. Click the **Submit** button.  
*Civic Platform returns to the Report Manager Portlet list portlet.*
8. Scroll to the right and click the **Create Criteria** link for report criteria customization, such as Record Type or language definitions.
9. Click **Submit**.

#### List 10: Report Manager Portlet Fields

<b>Description</b>	Enter a brief description for the report.
<b>Display</b>	Use the drop-down list to select the display. Single Window or Multiple Window.
<b>Module</b>	Use the drop-down list to select the Module name.
<b>Portlet Name</b>	Use the drop-down list to assign the report to the associated portlet, menu or button.

## Configuring Parameters for Reports in ACA

Citizen Access supports all parameters including: parameter types, session variables, and custom variables. If a configured parameter is available in the ACA form, it is sent to the report automatically. Standard reports, such as the Permit Receipt Report, have pre-defined parameters together with the report. Refer to [Table 17: Pre-defined Report Parameter Details on page 480](#) for special configuration information about parameters for the Permit Summary Report, Permit Receipt Report and the Record Report. You can define any additional parameters for these reports on the Parameter tab in Report Manager and pass the parameters after the pre-defined parameters are sent to the report. Parameters do not display in the URL

string. Administrators do not need to use all parameters in your report. For example, in single agency implementation, the agencyid is always the same. In this case, the agencyid is not mandatory for reports outside of the Standard reports. Citizen Access does not support duplicate parameters including duplicate parameter names.

**Table 17: Pre-defined Report Parameter Details**

Report Name	Parameter Configurations
Permit Report	Set the <b>agencyid</b> parameter with NO in visibility field. Set the <b>catid</b> parameter with NO in the visibility field.
Permit Summary Report	Set the <b>agencyid</b> parameter with NO in visibility field. Set the <b>catid</b> parameter with NO in the visibility field.
Permit Receipt Report	Set the <b>agencyid</b> parameter with NO in visibility field. Set the <b>catid</b> parameter with NO in the visibility field. Set the <b>receiptnbr</b> parameter with NO in the visibility field.

This section provides administrators with available parameters and available variables for ACA reports. Refer to [List 11: ACA Parameter Types on page 480](#) for a list of parameter types available in the Type drop-down list in the Parameters portlet in Report Manager. After administrators select the Session Variable from the Parameter Type drop-down list, the Default Value field displays with a drop-down list of available session variables. Refer to [Table 18: ACA Session Variable Table on page 480](#) for the session variables options. For more information about parameters, refer to the section, “Setting Up a Report” in the “Report Manager” chapter *in the Accela Civic Platform Administrator Guide*.

**List 11: ACA Parameter Types**

Record Type
Date
Number
Session Variable
String
Variable

**Table 18: ACA Session Variable Table**

Variable	Description
\$\$altID\$\$	Retrieves the ALTID.
\$\$recordID1\$\$	Retrieves the first 5 characters of the Record ID from a the specified portlet. For example, RecordID= <b>01BLD-00000-00018</b> .
\$\$recordID2\$\$	Retrieves the second 5 characters of the Record ID from the specified portlet. For example, RecordID= 01BLD- <b>00000-00018</b> .
\$\$recordID3\$\$	Retrieves the last 5 characters of the CA ID from the specified portlet. For example, RecordID= 01BLD-00000- <b>00018</b> .
\$\$collectionID\$\$	Retrieves the Collection ID from the specified portlet.

**Table 18: ACA Session Variable Table (Continued)**

Variable	Description
\$\$firstName\$\$	Retrieves the user's first name.
\$\$language\$\$	Retrieves the preferred language.
\$\$lastName\$\$	Retrieves the user's last name.
\$\$middleName\$\$	Retrieves the user's middle name.
\$\$module\$\$	Retrieves the Module.
\$\$parcelID\$\$	Retrieves the associated ParcelID
\$\$publicUserID\$\$	Retrieves the Public User's ID.
\$\$servProvCode\$\$	Retrieves the ID for the agency. This is used to filter reports to include records only for the specified agency. This is a required parameter for many reports and agencies that share data.
\$\$stateLicNum\$\$	Retrieves the State License Number
\$\$today\$\$	Retrieves today's date. The workstation systemdate determines this date. You can use this variable parameter in calculations to specify a date range. For example, enter \$Today\$ - 7 to query for all records over the last week.
\$\$userID\$\$	Retrieves the ID of the logged-in user.
\$\$userFullName\$\$	Retrieves the user's full name.

## Setting Report Viewable Permissions

After a report is enabled for use in Citizen Access, administrators define permissions about who can view the documents available on the report link. This section provides instructions on how to define permissions to view reports associated with the report link on the Home page, the report link within a module, and the report link within specific web pages. This section also provides instructions on how to allow anonymous users to view reports.

### Topics

- [Defining Permissions for the Home Page Report List](#)
- [Defining Module Permissions for the Report List](#)
- [Filtering Reports on a Web Page](#)
- [Defining Permissions for Anonymous Users](#)

## Defining Permissions for the Home Page Report List

Administrators have control of who can see reports on the report list at login by defining which type of user has permissions to view available reports assigned to the ACA report list from the Home page. The Global Settings page provides a Report Display Controls area where administrators set permissions for the user types. The various user types include: All ACA

Users, Anonymous Users, Registered User, Licensed Professional, Authorized Agent, and Authorized Agent Clerk.

#### To define the home page report list

1. Navigate to Citizen Access Setup.
2. Click the **Global Settings** tab under the **General Settings** section of the navigation area.  
*Citizen Access Setup displays the Global Settings page.*
3. Go to the **Report Display Controls** area.
4. Mark the associated check box for each type of user with permissions to view the related report on the **Home** page.
5. Click **OK**.

## Defining Module Permissions for the Report List

After reports are available to ACA, administrators can define which type of user can view reports within each module. User type options include: All ACA Users, Anonymous Users, Registered User, Licensed Professional, Authorized Agent, and Authorized Agent Clerk. For example, you may want the Permit Receipt report viewable to the licensed professional and registered user, but not to an anonymous user. Administrators define report permissions for a module on each Module Settings page in ACA Admin.

#### To define which user types can view reports in a module

1. Navigate to Citizen Access Setup.
2. Click the **Module Settings** tab for a **Module** in the navigation area.  
*Citizen Access Setup displays the Module Settings page.*
3. Go to the **Report Display Controls** area.

Available Reports	All ACA Users	Anonymous Users	Registered User	Licensed Professional	Agent	Agent Clerk
ACA Fee Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ACA Record Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ACA Submittal Counts by Month	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CrystalReport	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
eFee Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ePermit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
eRecord Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
kelly_test	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

4. Mark the associated check box(es) for the users allowed to view the report in a module.

5. Click **OK**.

## Filtering Reports on a Web Page

When reports are available on the Reports link in ACA, administrators can filter which reports display on web pages. For example, you may want to have the Permit Receipt Report only available on the Review web page. Administrators configure which reports are available on a web page in Field Properties area of the ACA Admin. Administrators right-click the Report link and filter which reports are available by marking the associated check box next to each report you want to display.

### To filter which reports display on a web page

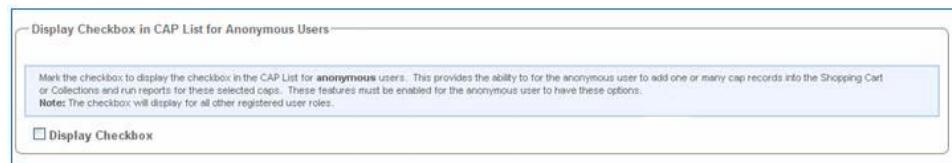
1. Navigate to Citizen Access Setup.
2. Go to a module web page or general web page for which you want to filter available reports.
3. Click the **Reports** link.  
*Citizen Access Setup displays the Report link with a yellow box around it.*
4. Go to the **Field Properties** area and mark the check box(es) next to the report(s) you want available on this web page.
5. Click **OK**.

## Defining Permissions for Anonymous Users

Your agency needs to decide to extend or limit report functionality to the various public user groups accessing ACA, including anonymous users. Each Module Settings page has a Report Display Controls section dedicated to assign permissions for report access. Mark the check boxes to indicate which users have access to the reports.

### To define report functionality for anonymous users

1. Navigate to Citizen Access Setup
2. Go to the **Display Check box in Record List for Anonymous Users** section on the **Global Settings** page.
3. Mark the **Display Check box** to indicate if you want anonymous users to have permissions to run reports for multiple records from the search results list.



4. Go to the **Report Display Controls** area on the **Global Settings** page

5. Mark or clear the check boxes in the **Anonymous Users** column to indicate which reports are available for anonymous users.

The screenshot shows a dialog box titled "Report Display Controls". At the top, there is a note: "Restrict who can view the Reports link at the top of the pages in the module: Select the user groups from All ACA Users, Anonymous Users, Registered Users, Licensed Professional, Authorized Agent, and Authorized Agent Clerk User." Below this is a table titled "Role Assignment" with the following columns: Available Reports, All ACA Users, Anonymous Users, Registered User, Licensed Professional, Agent, and Agent Clerk. The table lists several reports, each with checkboxes in the respective columns indicating their availability to different user groups. At the bottom of the dialog are "OK" and "Cancel" buttons.

Available Reports	All ACA Users	Anonymous Users	Registered User	Licensed Professional	Agent	Agent Clerk
ACA Fee Report	<input checked="" type="checkbox"/>					
ACA Record Summary	<input checked="" type="checkbox"/>					
ACA Submittal Counts by Month	<input checked="" type="checkbox"/>					
CrystalReport	<input checked="" type="checkbox"/>					
eFee Summary	<input checked="" type="checkbox"/>					
ePermit	<input checked="" type="checkbox"/>					
eRecord Summary	<input checked="" type="checkbox"/>					
kelly_test	<input checked="" type="checkbox"/>					

6. Click **OK**, then click **Save**.

## Sending Reports to Public Users by E-mail

You can send reports by e-mail to public users. For more information about setting up reports to send e-mail, refer to the steps in the section, “Adding a Report” in the “Report Manager” chapter in the *Accela Civic Platform Administrator Guide*.

## Configuring Multiple Agency Functionality

Citizen Access supports multiple agency functionality and reporting. When a public user selects a record, the record information populates in ACA, including any associated reports or fees. For example, a building project may have fees associated at the State, County, and City level. Each agency can create a record receipt report for the fees they charge. The super agency may provide a receipt to include all fees across all sub-agencies in one report.

Administrators must assign reports to the **Print/View** buttons and report links in ACA. Each sub-agency including the super agency has their own corresponding buttons. Therefore, each agency at their agency level must assign reports to Report Manager and assign them to buttons or links so ACA can pull those configurations and display the applicable reports to public users online. This section of documentation provides instructions on how to configure reporting functionality for multiple agencies.

### To configure multi-agency reporting

1. Verify the pre-requisite tasks of creating reports, such as the Record Receipt Report, for all agencies are complete. For information on how to create a report, see the “Setting Up Report Services” section in the “Report Manager” chapter of the *Accela Civic Platform Administrator Guide*, or contact your Accela implementation specialist.
2. The delegate user or agency user logs in to each agency and navigates to Report Manager.

3. Assign reports to the applicable report link or applicable report button in the portlet drop-down list for each agency. For more information, see [Associating Reports with Print/View Buttons on page 475](#).
4. If applicable, define criteria for language or record types for each report.
5. Click **Submit**.
6. Customize the **Record Detail** and/or **Receipt** pages in **Citizen Access Setup**. For more information, see [Chapter 10: Working with Web Pages on page 160](#).

## CHAPTER 21:

# MAINTAINING THE ACA WEBSITE

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While numerous users are constantly adding information to your database, you can configure features to help eliminate unnecessary information. You can define an expiration interval, which is the number of days public users must activate their registered account. When the public user accounts pass the expiration interval, Civic Platform purges the account. You can also purge partially completed applications and their associated fees from your system. Partially completed applications are records that public users have completed, but not submitted to the agency. This is common when public users are seeking for a fee estimate regarding an application.

### Topics

- [Defining Expiration Interval Settings](#)
- [Deleting Partially Completed Applications](#)

## Defining Expiration Interval Settings

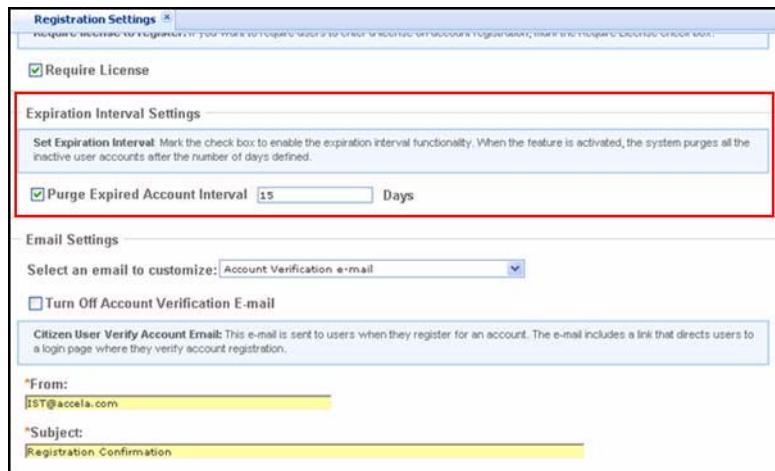
This setting relates to the number of days Civic Platform saves inactive registrant information before purging. If the account verification setting is enabled, a registration account remains inactive until the registrant activates their account by selecting the hyperlink associated with their account verification e-mail they received after registration. Refer to [Defining Activation E-mails on page 100](#). The expiration interval setting defines how many days allocated to the registrant to select their hyperlink before their registrant information is expired and purged.

This feature functions by defining an EMSE (Event Manager and Script Engine) script that purges the inactive accounts and runs as a regularly scheduled batch job. The script references the number of days in this setting. The instructions below provide an example script. For more information about EMSE scripts and batch jobs, refer to the “Event Manager and Script Engine” chapter in the *Accela Civic Platform Scripting Guide*.

This setting relates to the Standard Choice Value PURGED\_EXPIRED\_ACCOUNT\_INTERVAL in the Standard Choice ACA\_CONFIGS. For information on configuring the Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

### To configure the expiration interval

1. Navigate to **General Settings > Registration > Expiration Interval Settings**.
2. Enter the interval in number of days.



## Deleting Partially Completed Applications

Partial applications are those applications that users save without submitting or save and resume later. This section explains how to set up Civic Platform to remove all partially completed applications from Civic Platform. These configuration steps do not affect completed applications.

This setup requires setting a Standard Choice and creating a script. The script is then set up as a batch job. The batch job removes partially completed applications from Civic Platform on a regular schedule that you define. By purging the partial applications, it frees up disk space and it makes it more efficient for users to locate completed applications. Upon deleting partial applications from Civic Platform, the applications cannot be retrieved.

Use this scenario to further understand how the Standard Choice and batch job scheduling handle removing partial applications from Civic Platform.

To remove partial applications that are older than 30 days, set the Value of the Standard Choice PARTIALLY\_COMPLETED\_CAP\_PURGE\_DAYS to 30. This is the number of days that partially completed applications remain in Civic Platform before Civic Platform removes them. If today is April 1, 2008, and the Value is 30 days, then all partial applications created on March 31, 2008 (which is day number 1 in counting) through March 2 remain in Civic Platform. Civic Platform removes partial applications created on March 1 and earlier. Civic Platform removes the partial applications when the scheduled batch job runs. Setting the batch job to execute the script on a daily basis removes all partial applications that were created on day 31 (March 1, in this case) and earlier.

**To delete partially completed applications, there are three major steps:**

- Step 1: Add the Standard Choice
- Step 2: Test the Script
- Step 3: Schedule the Batch Job to Run the Script

### **Step 1: Add the Standard Choice**

As system administrator, you must define which partial application data you want to purge from Civic Platform. To do this, you must configure the related Standard Choice and write a script.

#### **To define partial application information you want to purge**

1. Go to **Civic Platform**.
2. Navigate to **Admin Tools > Application > Standard Choices**.
3. Configure the Standard Choice **PARTIALLY\_COMPLETED\_CAP\_PURGE\_DAYS** and set the Standard Choices Value to the number of days Civic Platform stores partially completed applications.

This value specifies how many days partially completed applications remain in Civic Platform before they are removed from Civic Platform. Using the example above, if today is April 1, 2008, and the value is 30 days, then all partial applications created on March 31, 2008 (which is day number 1 in counting) through March 2 remain in Civic Platform. And Civic Platform removes those partial applications created on March 1 and earlier.

For information on creating a Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

### **Step 2: Test the Script**

Verify the script is working properly before defining it as a batch job.

#### **To test the script**

1. Go to **Administrator Tools > Event Manager > Scripts**.  
*Scripts - Search page displays.*
2. Click the **Submit** button.  
*Scripts - Script List page displays.*
3. In the Script Code field, locate CLEAREXPIREDINCOMPLETECAP.
4. Click the red dot next to the Script Code for CLEAREXPIREDINCOMPLETECAP.  
*Scripts - Script Detail page displays.*
5. Under the Script Text area, click the **Script Test** button.  
*The Script Test page displays.*  
Review the warning message that states *improperly written scripts may incorrectly alter data for many records*.
6. Under the Script Text area, click the **Submit** button.  
*A pop-up window with test messages displays whether the script is successful or has errors.*
7. Click the **Close** button on the pop-up window.  
*The Script Output field displays passed or error messages.*

8. If necessary, make any corrections to the script and click the **Submit** button to retest.  
If you have changes you must save them to the original script. To do this, return to **Administrator Tools > Events > Scripts** and locate the CLEAREXPIREDINCOMPLETECAP script and make the updates to the Script Text and click the **Save** button.
9. Complete the next section of [Step 3: Schedule the Batch Job to Run the Script](#).

### **Step 3: Schedule the Batch Job to Run the Script**

After the script has passed testing, you can create a batch job. When the batch job is created, you can schedule the script to run as a regularly scheduled event in Civic Platform.

#### **To schedule a batch job to run the script**

1. Navigate to **Setup portlet > System Tools > Batch Engine**.

*Civic Platform displays the Batch Jobs portlet.*

2. Click the **New** button.

*Civic Platform displays the New Batch Job portlet.*

3. Complete the following required fields:

<b>Name</b>	Enter a name to help you identify the batch job.
<b>Description</b>	Enter a description or comment to further clarify any aspects about the batch job.
<b>Job Server</b>	Select the server for running the batch job.
<b>Job Type</b>	Select job type “Script” from this drop-down menu.
<b>Script Code</b>	Use the drop-down list and locate the existing script CLEAREXPIREDINCOMPLETECAP. This is the script that you just created and now need to run when executing this batch job.
<b>Status</b>	If you want to let users run this batch job, mark <b>Enable</b> ; otherwise, mark <b>Disable</b> .

4. Click the **Submit** button to save the batch job.
5. Select the **Job Schedule** tab.
6. Schedule the batch job and specify how often you want to execute the script. Complete these fields.

<b>Frequency</b>	Use the drop-down list and choose the interval of the batch job: Once, Daily, Weekly, or Monthly.
<b>Schedule Status</b>	Specify if it is Scheduled, Not Scheduled, or Execute.
<b>Start Date</b>	Use the Date button to search for the date when the batch job begins.

**Start Time** Enter the time when the batch job should begin and specify AM or PM with the drop-down list.

**Time Out (seconds)** Enter the number of seconds a batch job attempts to run before timing out.

To further explain how the Standard Choice setting and the batch job schedule work together, consider the Standard Choice is set to 90 days and this batch job Interval is set to Daily. These settings mean that partially completed applications remain in Civic Platform for 90 days, and the batch job removes all partial applications that were created on day 91 and earlier, on a daily basis.

7. Click the **Save** button to submit this batch job to Civic Platform.

## PART III

# APPENDICES

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[Appendix A: Accela Engineering Event Scripts](#)

[Appendix B: Features Requiring Interface Implementations](#)

[Appendix C: Variations for Creating Records](#)

[Appendix D: LDAP Authentication and SSO](#)

[Appendix E: Mobile Citizen Access](#)

[Appendix F: Legislative Management](#)

**APPENDIX A:**

# ACCELA ENGINEERING EVENT SCRIPTS

Several features in Civic Platform include event scripts in JavaScript. The Accela Engineering department creates the event scripts and adds them within Civic Platform. These Engineering event scripts, listed in this appendix, require the Accela Services Implementation staff to customize them so they can function for your agency.

The Accela Services Implementation team maintains their own list of commonly used scripts, and also handle requests to create scripts. Accela Services Implementation staff can modify or create event scripts to provide unique functionality for an agency.

**Note:** *Only Accela Services Implementation staff or IT agency administrators who are performing agency-wide functions should customize the event scripts. For further information on working with scripts, refer to Chapter 18, “Event Manager and Script Engine.” For instructions on writing a script, see Chapter 19, “Writing Scripts.” Both of these chapters are in the Accela Civic Platform Administrator Guide.*

From Civic Platform 6.7.0 and upwards, Civic Platform Classic Administration provides all of the event scripts that the Accela Engineering department created. To locate the list of event scripts, follow the directions indicated in [Accessing Event Scripts on page 492](#) in this Appendix.

This appendix lists all the available event scripts in Citizen Access.

## Topics

- [Accessing Event Scripts](#)
- [Citizen Access Events](#)

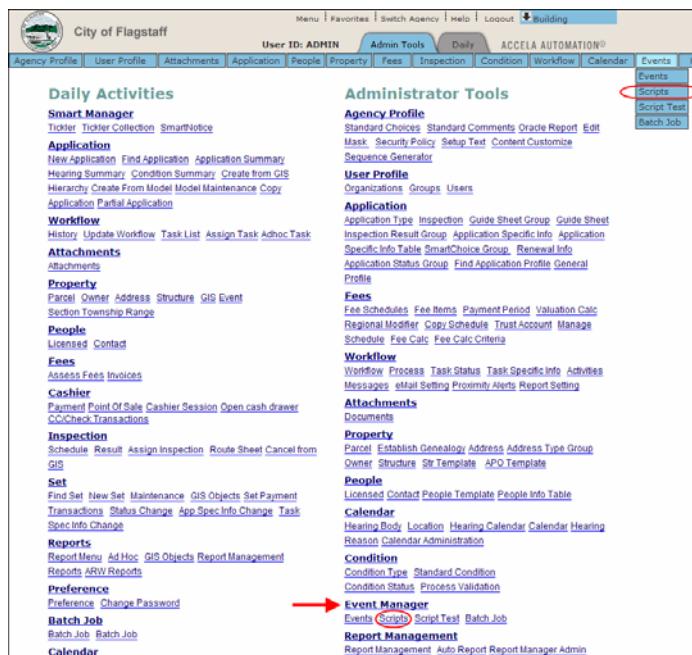
## Accessing Event Scripts

To access the event scripts, log in to Civic Platform Classic Administration. Click the Admin Tools tab, and locate Scripts under the Events menu item. Alternately, scroll to Event Manager

and click the Scripts link. For an illustration on accessing scripts, refer to [Figure 121: Accessing Scripts on page 493](#).

**Note:** Only experienced programmers or agency administrators should use this feature. Improperly written scripts can adversely affect your system, and can incorrectly alter or delete data for many records. Make sure you write custom scripts carefully and test them before you implement them. For further instructions on writing scripts, see the Accela Civic Platform Scripting Guide.

**Figure 121: Accessing Scripts**



### To modify the script

1. Go to Civic Platform Classic Administration > Admin Tools tab
2. Under the Events menu, click the **Scripts** link.

Civic Platform displays the **Scripts -Search page**.

The screenshot shows the 'Scripts -Search page'. It has a header 'Scripts' and a sub-instruction 'Use this form to search for a Script'. Below this are two input fields: 'Script Code:' and 'Script Title:', both containing the value 'get'. A 'Submit' button is located at the bottom right of the form.

3. Enter the first few characters of the script in the Script Code or Script Title fields. Event scripts typically share the same Code and Title names. You can enter the characters in uppercase or lowercase.

Civic Platform displays the *Scripts - List* page.

Script Code	Script Title	Last Modified
• GETCAPIDSBYAPPSPECIFICINFODATE	getCapIDsByAppSpecificInfoDateRange	7/11/2007 by ADMIN
• GETLICENSESBYCAPID	getLicensesByCapID	7/11/2007 by ADMIN
• GETNEXTAVAILABLETIME	getNextAvailableTime	2/14/2008 by ADMIN
• GETTASKBYPATH	getTaskByPath	6/19/2008 by ADMIN
• GETTASKSTATUS	getTaskStatus	6/19/2008 by ADMIN
• GetAddressSetParameters	GetAddressSetParameters	8/13/2008 by ADMIN
• GetLicProfessionalSetParameter	GetLicProfessionalSetParameter	8/13/2008 by ADMIN
• GetTimeLog	GetTimeLog	8/13/2008 by ADMIN
• getAddressWithTypeByCapId	getAddressWithTypeByCapId	8/13/2008 by ADMIN
• getAddressWithTypeByPK	getAddressWithTypeByPK	8/13/2008 by ADMIN
• getInspectorsWorkload	getInspectorsWorkload	8/13/2008 by ADMIN

Search  
or  
[Add](#)  
[New Script](#)

4. Click the red dot next to the script you want to modify. For instructions on writing and testing scripts, refer to the *Accela Civic Platform Scripting Guide*.

## Citizen Access Events

This section provides the event scripts related to Citizen Access.

- [Accela Asset Management \(AAM\)](#)
- [Address Type](#)
- [ASI](#)
- [APO](#)
- [Condition](#)
- [Education](#)
- [Fees](#)
- [Inspection](#)
- [Internationalization](#)
- [License](#)
- [Payment](#)
- [Portlet](#)
- [Public User](#)
- [Records](#)
- [Reports](#)

- Sets
- Sets of Sets
- Time Accounting
- Trust Account
- Valuation Calculator Versioning
- Workflow

## Registration and Login

You can use the following event scripts during registration and login:

OnLoginBefore  
OnLoginAfter  
RegistrationSubmitAfter  
RegistrationSubmitBefore

## Accela Asset Management (AAM)

You can use the following event scripts for Accela asset management:

AssetSubmitBefore  
AssetSubmitAfter  
AssetUpdateBefore  
AssetUpdateAfter  
ConditionAssessmentSubmitBefore  
ConditionAssessmentSubmitAfter  
ConditionAssessmentUpdateBefore  
ConditionAssessmentUpdateAfter  
PartTransactionSubmitBefore  
PartTransactionSubmitAfter  
PartTransactionUpdateBefore  
PartTransactionUpdateAfter

## Address Type

You can use the following event scripts with address types:

GetAddressWithTypeByCAPId  
GetAddressWithTypeByPK

---

RemoveAddressWithType

## ASI

You can use the following event scripts for application-specific information groups and subgroups:

AddReferenceASIIItemsToCAP

CopyASIIItemsFromCAPToCAP

RemoveSubgroupsFromCAP [08ACC-03640]

## APO

You can use the following event scripts for address, parcel, owner data (APO):

Add\_RemoveCapOwners

GetOwnersByParcel

## Condition

You can use the following event scripts for conditions:

ApplicationSubmitAfter4ConditionGroup

PartialCapConditionEmseTest

## Education

You can use the following event scripts for education:

ApplicationSubmitAfter

ContinuingEducationUpdateAfter

ExaminationUpdateAfter

ExaminationUpdateBefore

EducationUpdateAfter

## Fees

You can use the following event scripts for fees:

FeeEstimateAfter4ACAScript

FeeScript. You can call the EMSE method editFeeNotes in FeeScript model, and also use method editFeeNotes to edit fee notes on any single fee item.

## Inspection

You can use the following event scripts for inspections:

- GetInspectorsWorkload
- UpdateInspectionForSuperVisor
- UpdateInspectionMilestone
- InspectionScheduleAfter
- InspectionScheduleBefore

## Internationalization

You can use the following event scripts for the internationalization feature:

- ApplicationStatusUpdateBefore [08ACC-05789]
- CheckTradeNameDuplicate [08ACC-05789]
- CloneCapCondition
- CopyCapConditionFromSTDCondition
- DisplayLocalizedMessageText
- CopyCapInfoFromTradeNameToTradeLicense [08ACC-03673]

## License

You can use the following event scripts for license records:

- ApplicationSubmitAfter4Renew
- PaymentReceiveAfter4Renew
- WorkflowTaskUpdateAfter4Renew

You can use the following event scripts for license renewal:

- ApplicationSubmitAfter
- PaymentReceiveAfter
- WorkflowTaskUpdateAfter
- Convert2RealCapAfter4Renew

## Payment

You can use the following event scripts for payments:

- PaymentReceiveAfter

**VoidPaymentBefore:** The event triggers immediately before the void information is committed to the database. The event passes all relevant void parameters to the script. The script can cancel the payment and return custom result codes.

**VoidPaymentAfter:** The event triggers after Citizen Access posts the void information to the database. The event passes all relevant void parameters to the script.

PaymentReceiveAfter4RenewTransferDoc

FinishOnlinePayment4TransferDoc

## Portlet

You can use the following event scripts for portlets:

getRefASISubgroups

getCAPASISubgroup

addRefASISubgroupsToCAP

removeASISubgroupsFromCAP

copyASISubgroups

getScreenListBySPEAR

## Public User

You can use the following event scripts for public users:

PublicUserEmseTest

## Records

You can use the following event scripts for general records:

ApplicationSubmitAfter

ApplicationSubmitBefore

CreateCAPForDetailDesc

GetCapByType

UpdateCAPForDetailDesc

PartialCapConditionEmseTest

LPAssociatedCapTest(InAStep)

LPAssociatedCapTest2(StepByStep)

**clearExpiredIncompleteCAP.** You can use the script to clear incomplete applications (CAPs) from Civic Platform. For more information, see “Deleting Partially Completed Applications” in the “Maintaining Fees” chapter in the *Accela Civic Platform Administrator Guide*.

## Reports

You can use the following event scripts for reports:

SendReportInEmail-1

SendReportInEmail-2

## Sets

The event scripts related to Set Parameters are:

GetAddressSetParameters

GetLicProfessionalSetParameters

AuditSetDetailUserExecuteAfter

## Sets of Sets

The event script related to Sets of Sets is:

PaymentReceiveAfter

## Time Accounting

The event scripts related to Time Accounting are:

GetTimeLog

LockTimeAccounting

TimeAccountingAddAfter

TimeAccountingAddBefore

TimeAccountingDeleteAfter

TimeAccountingDeleteBefore

TimeAccountingUpdateAfter

TimeAccountingUpdateBefore

V360InspectionResultSubmitBefore

WorkflowTaskUpdBefore

## Trust Account

The event scripts related to Trust Account are:

EMSEPayFromTrustAccount

## Valuation Calculator Versioning

The event scripts related to Valuation Calculator Versioning are:

ValuationCalculator\_EMSE\_Test.txt

## Workflow

The event scripts related to Workflow are:

WorkflowEMSEEnhancements

WorkflowTaskUpdateAfter4Renew4TransferDoc4AbuDhabi

**APPENDIX B:**

# FEATURES REQUIRING INTERFACE IMPLEMENTATIONS

Several features in Citizen Access include implementing interfaces. This appendix explains some of these features and provides implementation examples for them. The features require the Accela Services Implementation staff or IT agency administrators to provide the programming based on your agency's need so that the feature works for your agency.

This appendix does not list all features that require interface implementations in Access Citizen Access. Accela provides SDK packages for features like the ePayment and XAPO integrations that require relatively complex configurations. You can find the SDK guides and zip files on Success Community.

**Topics**

- [Globally Disabling Unwanted Actions](#)
- [Implementing Custom Component](#)

## Globally Disabling Unwanted Actions

You can globally disable unwanted actions listed in [Table 19: Actions That Can Be Globally Disabled](#) by implementing the interface *IGrantPermission*. All the links and buttons that relate to the action are removed or disabled throughout Citizen Access. The feature is useful when your agency does not want certain action available for public users in Citizen Access. For example, if your agency does not implement online payment processing, you disable the Fee Payment action globally so that the citizens cannot go into the pay fees page during the application process because your agency does not offer a way to pay money due over the internet.

This action control works on a global level, which means when you disable an action, all the links and buttons specific for the action, regardless of in which module, page, or section, are hidden or disabled across Citizen Access. You can prevent some or all public users from performing the disabled action. For permission control on user groups in certain modules for certain objects, refer to the corresponding sections in this guide. For example, you can refer to [Record Type Filters on page 122](#) to learn how to define who have the permission to create record and of which record type they can create record, and refer to [Document Attachments on page 332](#) to learn how to define record types and define public user permissions for Attachment.

The table below lists the actions that you can disable globally.

**Table 19: Actions That Can Be Globally Disabled**

Action	Description
Create Record	It is for public users to create permits or licenses.
Renew Record	It is for licensed professionals to renew their licenses to keep the licenses current.
Obtain Fee Estimate	It is for fee estimation. Public users employ it to display a calculated estimate of fees relating to record type online.
Fee Payment (including Check Out, Pay Fee, Pay Fee Due)	It is for public users to pay fees for the fee items associated with a business license or a building permit. When you disable the Fee Payment action, the Check Out button and the Pay Fee and Pay Fee Due links are disabled or removed.
Schedule Inspection (including Request, Reschedule, Cancel Inspection)	It is for public users to schedule inspection for the record. When you disable the Schedule Inspection action, you also disable the Reschedule Inspection and Cancel Inspection actions.
Attach Document	It is for public users to upload document to record.
Copy Record	It is for public users to clone an existing record to create a new record of the same record type.
Create Amendment	It is for public users to create amendment record in the ACA flow process. An amendment record is a child record of the parent record and inherits some information from the parent record for processing.

## Topics

- [Interface and Class](#)
- [Steps of Implementing IGrantPermission Interface](#)
- [Example of Implementing IGrantPermission Interface](#)

## Interface and Class

The following lists interface and class that you use to disable unwanted actions.

**IGrantPermisison:** Interface that you must implement to disable the unwanted actions.

**UserContext:** Class that provides the current login user information. It contains the following properties.

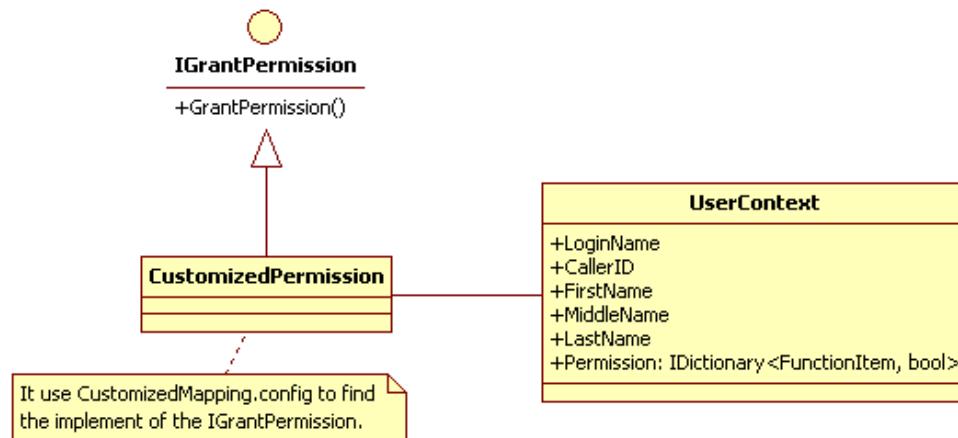
- LoginName: login name that the registered user uses to access ACA.
- CallerID: Login user's ID assigned when registered.
- FirstName: The first name of the login user.
- MiddleName: The middle name of the login user.
- LastName: The last name of the login user.

The personal information above are useful when you prevent only certain users from performing certain actions.

- Permission: `IDictionary<FunctionItem, bool>`: It is used to set the disabled actions. Define the `FunctionItem` as Enumeration type.

The following diagram illustrates the relation between the interface and the class.

Figure 122: Disabling Action Programming Interface Class Diagram



## Steps of Implementing `IGrantPermission` Interface

### To implement the `IGrantPermission` interface

1. Create a project and add the `Accela.ACA.CustomizedAPI.dll` file from the `bin` folder under the ACA deployment directory to the project as reference.
2. Declare a class that implements the `IGrantPermission` interface.
3. Define unwanted actions by setting `UserContext.Permission` inside the `GrantPermission` method in the class.
4. Compile the program to generate one or more dll files.
5. Copy the dll files to the `\Customize\DLL` folder and the `\bin` folder under the ACA deployment directory.
6. Add the following configuration node to the `CustomizedMapping.config` file under the `\Customize\Mapping` folder under the ACA deployment directory by following the syntax below.

```
<object id="IGrantPermission" type="namespace, assembly"  
singleton="true"></object>
```

**namespace:** namespace under which you create the class, and plus the class name.

**assembly:** name of the .dll file that contains the class that implement the interface *IGrantPermission*.

## Example of Implementing *IGrantPermission* Interface

Below is an example of how to globally disable unwanted action by implementing *IGrantPermission*.

**Intention:**

Disable the Schedule Inspection action when anonymous users navigate in Citizen Access.

**Assumption:**

Citizen Access sits in \\aa-server\aca-product.

Use .NET Framework to develop the program.

**Steps of implementation:**

1. Create a project with .NET Framework.
2. Locate the *Accela.ACA.CustomizedAPI.dll* file from the \\aa-server\aca-product\bin folder, and add it to the project as reference.
3. Declare a class “CustomizedPermission” to implement the *IGrantPermission* interface.  
Below is the sample code:

```
using System;
using System.Collections.Generic;
using Accela.ACA.CustomizeAPI;
namespace CustomizeTest.Web
{
    public class CustomizedPermission:IGrantPermission
    {
        public void GrantPermission()
        {
            if
(String.IsNullOrEmpty(BaseCustomizeComponent.UserContext.LoginName)
{
                Dictionary<FunctionItem, bool> permissions = new
Dictionary<FunctionItem, bool>();
                permissions.Add(FunctionItem.ScheduleInspection,
false);
                BaseCustomizeComponent.UserContext.Permissions =
permissions;
            }
        }
    }
}
```

```
    }  
}  
}
```

4. Compile the class and generate a *dll* file *DisableActionSample.dll*.
5. Copy the *DisableActionSample.dll* file in to the \\aa-server\aca-product\Customize\DLL folder and to the \\aa-server\aca-product\bin folder.
6. Add the following configuration node to the *CustomizedMapping.config* file located in \\aa-server\aca-product\Customize\Mapping folder.

```
<object id="IGrantPermission"  
type="CustomizeTest.Web.CustomizedPermission, DisableActionSample"  
singleton="true"></object>
```

## Implementing Custom Component

You can create a custom component to contain your agency's own information displaying to public users specially, by implementing the interface *ICustomizedComponent*. For example, you customize a component to include your agency logo, announcements, legal information, and web links.

Custom components can be nested. A custom component can contain another custom component as its sub-component, which in turn can contain sub-sub-component. The custom component displays in the application intake form and the home pages, including the Welcome Global page and the Welcome Registered page. Custom components require configurations in Access Citizen Setup to load the custom contents to the web pages when public users access these pages. For an example on how to create a custom component and get your Citizen Access website running with the content, see [Example of Implementing ICComponent Interface on page 508](#).

When you implement the interface *ICustomizedComponent* to create a custom component, you can reference to the DLL file, *ComponentService.dll*, and call the APIs exposed by the DLL to get data from the Citizen Access database. For the complete list of APIs, see [Table 20: APIs Exposed by ComponentService.dll on page 520](#). For an example on how to create a custom component which gets data from the Citizen Access database, see [Example of Creating a Custom Component That Implements APIs on page 513](#).

### To implement custom component on your ACA site

1. Create a component file by implementing interface *ICustomizedComponent*. See [Steps of Implementing ICComponent Interface on page 508](#), or refer to the examples: [Example of Implementing ICComponent Interface on page 508](#), and [Example of Creating a Custom Component That Implements APIs on page 513](#).
2. Complete configuration in Citizen Access Setup.
  - To display the custom component on the home pages, customize the Welcome Global page and the Welcome Registered page. See [Customizing Home Page Components on page 175](#).

- To display the custom component in the application intake form, customize Customize the page flow. See [Working with Components on page 148](#) and [Listing of Components on page 151](#).

## Topics

- [Interface and Classes](#)
- [Steps of Implementing ICustomizedComponent Interface](#)
- [Example of Implementing ICustomizedComponent Interface](#)
- [Example of Creating a Custom Component That Implements APIs](#)

## Interface and Classes

The following lists interface and class that you use to create custom components.

**ICustomizedComponent:** interface that you must implement to create custom components. It contains the following property and methods:

- Children: List<ICustomizedComponent>: The property is used to collect sub-components.
- Show(): Execute customized business logic while showing contents.
- SaveBefore(): Execute customized business logic before saving. For example, do validation.
- Save(): Execute customized business logic while saving data.
- SaveAfter(): Execute customized business logic after saving.
- SaveAndResumeBefore(): Execute customized business logic before saving the partial application. This is for application intake form use only.
- SaveAndResume(): Execute customized business logic while saving the partial application. This is for application intake form use only.
- SaveAndResumeAfter(): Execute customized business logic after saving the partial application. This is for application intake form use only.

Citizen Access provides a number of APIs in the ComponentService.dll file for data integration with the custom component. For the complete list of APIs, see [Table 20: APIs Exposed by ComponentService.dll on page 520](#). For an example on how to create a custom component which gets data from the Citizen Access database, see [Example of Creating a Custom Component That Implements APIs on page 513](#).

**ResultMessage:** Class that contains two properties. The returned parameters of the methods listed above must be of this type that both ACA and the class you are going to create for implementing the IcustomizedComponent interface can recognize.

- IsSuccess: The invoked method returns a value, either “true” or “false”, for this property.
- Message: If the IsSuccess is equal to “false”, an error message shows on ACA pages, and meanwhile stop submitting.

**UserContext:** Class that provides the current login user information. It contains the following properties.

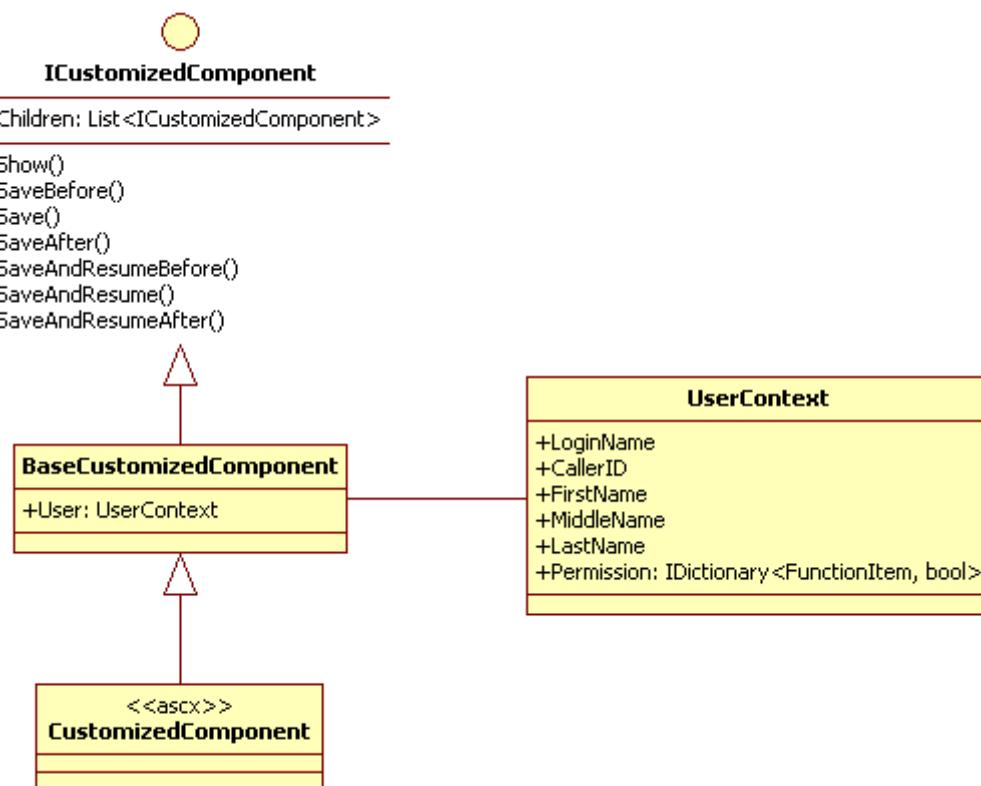
- LoginName: login name that the registered user uses to access ACA.

- CallerID: Login user's ID assigned when registered.
  - FirstName: The first name of the login user.
  - MiddleName: The middle name of the login user.
  - LastName: The last name of the login user.
- The personal information above are useful when you prevent only certain users from performing certain actions.
- Permission: IDictionary<FunctionItem, bool>: Best practice is that you do not set the permission to this property, instead, you set the permission by implementing IGrantPermission interface if necessary, and obtain the customized permission with this property. Define the FunctionItem as enumeration type.

**BaseCustomizedComponent:** The base class that must be inherited by creating a new class to add new custom component.

- User:UserContext: Property that is of UserContext type.

The following diagram illustrates the relation between the interface and the classes.



## Steps of Implementing **ICustomizedComponent** Interface

### To implement the **ICustomizedComponent** interface

1. Create a project and add the *Accela.ACA.CustomizedAPI.dll* file from the *bin* folder under the ACA deployment directory to the project as reference.
2. Declare a class that inherits the *BaseCustomizedComponent* Class that implements the **ICustomizedComponent** interface.
3. Create your own content, such as agency logo, announcement, legal information for the component in the *ascx* file.
4. Compile the program to generate one or more *dll* files.
5. Copy the *dll* files to the *\Customize\DLL* folder under the ACA deployment directory and *\bin* folder.
6. Copy the *ascx* file from the project to the *\Customize\UserControls* folder under the ACA deployment directory.
7. Add the *ascx* file name and the path to the web pages.
  - If to display the custom component on the home pages, customize the Welcome Global page and the Welcome Registered page. See [Customizing Home Page Components on page 175](#).
  - If to display the custom component in the application intake form, customize Customize the page flow. See [Working with Components on page 148](#) and [Listing of Components on page 151](#).

## Example of Implementing **ICustomizedComponent** Interface

Below is an example of how to implement a custom component by implementing **ICustomizedComponent** interface.

### Intention:

Create a custom component and add it to both the Welcome Global page and the Welcome Registered page. The custom component contains a logo image, a paragraph of text, and a Schedule Inspection link. The Schedule Inspection action is globally disabled when anonymous users navigate in Citizen Access, see [Example of Implementing \*\*IGrantPermission\*\* Interface on page 504](#).

### Assumption:

Citizen Access sits on `\aa-server\aca-product`.

Use .NET Framework to develop the program.

### Prerequisite:

Assuming that the Schedule Inspection action - globally disabled for anonymous users - is implemented. See the programming in [Example of Implementing IGrantPermission Interface on page 504](#).

**Steps of implementation:**

1. Create a project with .NET Framework.
2. Locate the *Accela.ACA.CustomizedAPI.dll* file from the \\aa-server\aca-product\bin folder, and add it to the project as reference.
3. Declare a class “CustomizedComponent” to inherits the *BaseCustomizedComponent* Class that implements the *ICustomizedCompoent* interface.

Below is the sample code:

```
using Accela.ACA.CustomizeAPI;
namespace CustomizeTest.Web
{
    public class CustomizedComponent:BaseCustomizeComponent
    {
        protected override void (OnLoad)(System.EventArgs e)
        {
            //The Schedule Inspection action - globally disabled for
            //anonymous users - is implemented by implementing IGrantPermission
            //interface.

            if (UserContext.Permission != null &
UserContext.Permissions.ContainsKey(FunctionItem.ScheduleInspection)
            && UserContext.Permisisons[FunctionItem.ScheduleInspection]==
false)
            {
                lnkScheduleInspection.Visible = false;
            }
            base.Onload(e);
        }
    }
}
```

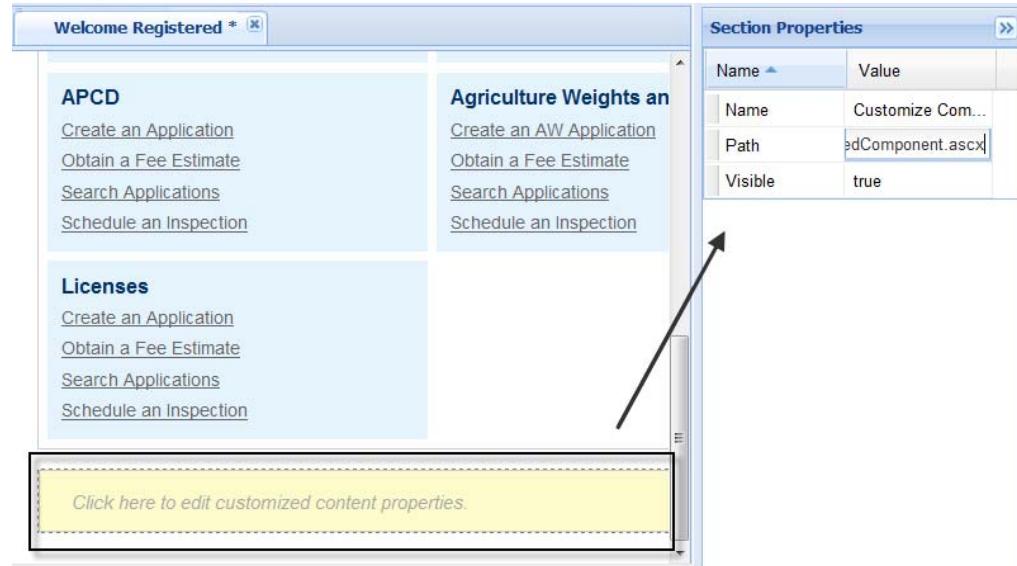
4. Globally disable the Schedule Inspection action when anonymous users navigate Citizen Access. See [Example of Implementing IGrantPermission Interface on page 504](#) for detailed information.
5. Add information to the *CustomizedComponent.ascx* file.

```
<%@ Control Language="C#" AutoEventWireup="true"
Inherits="CustomizeTest.Web.CustomizedComponent" %>
```

```
<div style="border: 1px solid gray; padding:5px;">  
    <div>  
        <!-- Add image -->  
          
    </div>  
    <font style="font-size: 1.2em;">Welcome to the new Citizen Portal</font>  
    <div>  
        <!-- Add text -->  
        <font style="color: #666666; font-size: 1.1em;">  
            We are pleased to offer our citizens, businesses, and visitors access to government services online,  
            24 hours a day, 7 days a week.  
        </font>  
    </div>  
    <br />  
    <div>  
        <!-- Add link -->  
        <asp:HyperLink ID="lnkScheduleInspection" NavigateUrl=".../.../Cap/CapHome.aspx?IsToShowInspection=yes&module=Building&TabName=Building">  
            Text="Schedule an Inspection" runat="server"></asp:HyperLink>  
    </div>  
</div>
```

6. Compile the class and generate a *dll* file *CustomizedComponentSample.dll*.
7. Copy the *CustomizedComponentSample.dll* file in to the \\aa-server\aca-product\Customize\DLL folder and the \\aa-server\aca-product\bin folder.
8. Copy the *CustomizedComponent.ascx* file in to the \\aa-server\aca-product\Customize\UserControls folder.
9. Configure the Welcome Global page and the Welcome Registered page to upload the component content on to the pages.
  - a. Navigate to **Citizen Access Setup > General > Page**.
  - b. open the **Welcome Global** page and the **Welcome Registered** page.
  - c. Scroll down to the bottom of the Welcome Global page.

Citizen Access Setup displays the “Click here to edit customized content properties” area.



- d. Click the “Click here to edit customized content properties” area to highlight it.
  - e. Fill the **Path** value with “CustomizedComponent.ascx”.
  - f. Set the **Visible** value to “true”.
  - g. Click **Save** button.
10. After configuration, the custom component applies to Citizen Access.
- On the Citizen Access Login (Welcome Global) page, the custom component, without the Schedule an Inspection link, displayed at the bottom of the page. Beware that all the

Schedule links in the Link section above the custom component hide also, because Schedule Inspection action only available for login users.

**ON-LINE SERVICES**

Accessibility Support | [Register for an Account](#) | [Reports \(5\)](#) | [Login](#)

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**Welcome to the new Citizen Portal**  
We are pleased to offer our citizens, businesses, and visitors access to government services online, 24 hours a day, 7 days a week.

In partnership with [Accela, Inc.](#), we are fulfilling our promise to deliver powerful e-government services and provide valuable information about the community while making your interactions with us more efficient, convenient, and interactive. **To use ALL the services we provide, you must register and create a user account**, by clicking on the [Register for an Account](#) link on the top right of the screen. You can view information, get questions answered and have limited services as an anonymous user. We trust this will provide you with a new, higher level of service that makes living and working in our community a more enjoyable experience.

**What would you like to do today?**  
to do, select one of the services listed below:

<b>Building</b> <a href="#">Create an Application</a> <a href="#">Search Applications</a>	<b>Licenses</b> <a href="#">Search Trade Names</a> <a href="#">View License Requirements</a>
<b>General Information</b> <a href="#">Lookup Property Information</a> <a href="#">Search for a Provider/Education</a> <a href="#">Search for a Licensee</a> <a href="#">Search for a Food Facility</a> <a href="#">Search for Certified Businesses</a> <a href="#">Search Documents by Geographic Location</a>	<b>AMS</b> <a href="#">Search Applications</a>

**Login**  
User Name or E-mail:   
Password:   
  
 Remember me on this computer  
[I've forgotten my password](#)  
[New Users: Register for an Account](#)

 CITY OF  
BRIDGEVIEW

Welcome to the new Citizen Portal  
We are pleased to offer our citizens, businesses, and visitors access to government services online, 24 hours a day, 7 days a week.



- Log in to the Welcome Registered page. The custom component displayed at the bottom of the Login page. All the Schedule Inspection links resume displaying in the Link Section.

ON-LINE SERVICES

Logged in as: James Shi |  Accessibility Support | Collections (1) ▾ | Reports (5) ▾ | Account Management | Logout

Search...

[Building](#) [Licenses](#) [Home](#) [General Information](#) [AMS](#)

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In partnership with [Accela, Inc.](#), we are fulfilling our promise to deliver powerful e-government services and provide valuable information about the community while making your interactions with us more efficient, convenient, and interactive. To use ALL the services we provide, you must register and create a user account, by clicking on the [Register for an Account](#) link on the top right of the screen. You can view information, get questions answered and have limited services as an anonymous user. We trust with this will provide you with a new, higher level of service that makes living and working in our community a more enjoyable experience.

**What would you like to do today?**  
to do, select one of the services listed below:

<b>Building</b> <a href="#">Create an Application</a> <a href="#">Search Applications</a> <a href="#">Schedule an Inspection</a>	<b>Licenses</b> <a href="#">Search Trade Names</a> <a href="#">View License Requirements</a> <a href="#">Schedule an Inspection</a>
<b>General Information</b> <a href="#">Lookup Property Information</a> <a href="#">Search for a Provider/Education</a> <a href="#">Search for a Licensee</a> <a href="#">Search for a Food Facility</a> <a href="#">Search for Certified Businesses</a> <a href="#">Search Documents by Geographic Location</a>	<b>AMS</b> <a href="#">Search Applications</a> <a href="#">Schedule an Inspection</a>

 CITY OF BRIDGEVIEW

Welcome to the new Citizen Portal  
We are pleased to offer our citizens, businesses, and visitors access to government services online, 24 hours a day, 7 days a week.  
[Schedule an Inspection](#)

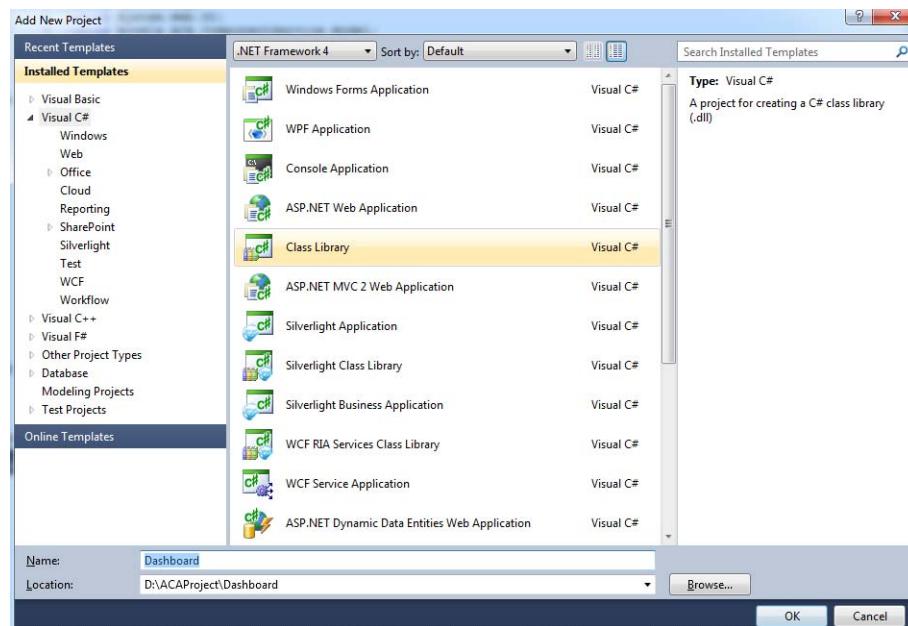
## Example of Creating a Custom Component That Implements APIs

When you implement the interface `ICustomizedComponent` to create a custom component, you can reference to the new DLL file, `ComponentService.dll`, and call the APIs exposed by the DLL to get data from the Citizen Access database. For the complete list of APIs, see [Table 20: APIs Exposed by ComponentService.dll on page 520](#).

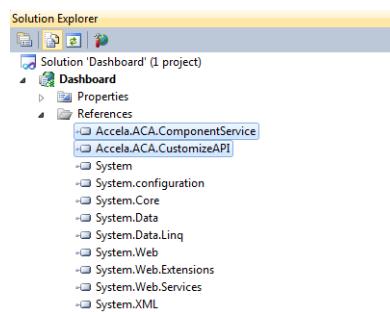
Below is an example of how to create a custom component “Dashboard” and add it to the Welcome Global page on the Citizen Access website. The Dashboard component implements the CapService.GetMyRecords API to get the record list of the current user and display the fees and fines information extracted from the records.

### To create a custom component with ComponentService.dll

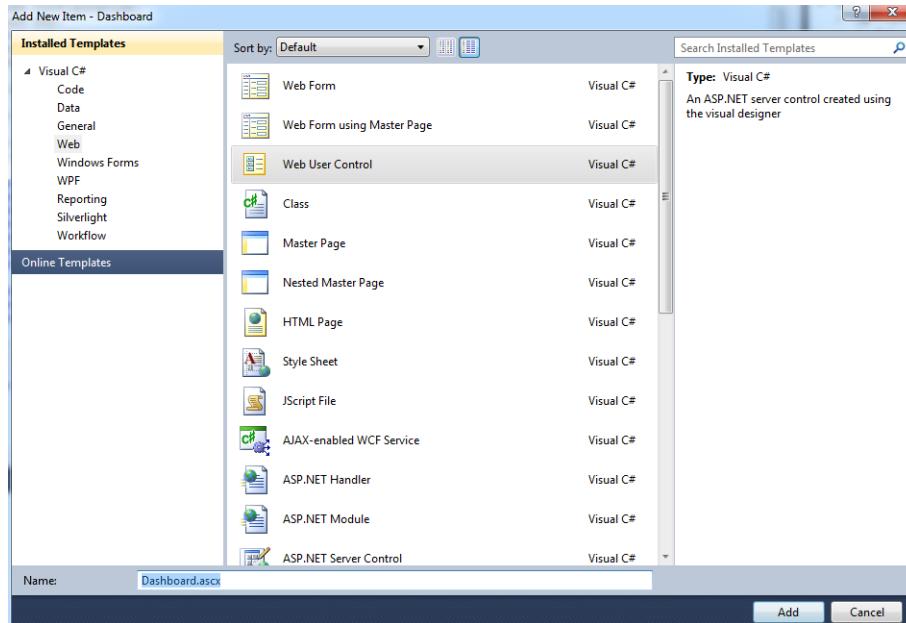
1. Create a new project in Visual C# and name the project as “Dashboard”.



2. Locate the required DLL files, ComponentService.dll and CustomizeAPI.dll, from the bin folder under the ACA deployment directory, and add them to the project as reference.



3. Create a web user control, and name it as “Dashboard.ascx”.



4. Declare a class “DashBoard” to inherit the `BaseCustomizeComponent` class in the `Accela.ACA.CustomizeAPI` namespace.

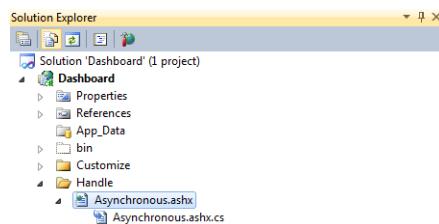
```
using system;
using system.collections.generic;
using system.configuration;
using system.web;
using system.web.ui;
using Accela.ACA.ComponentService.Model;
using Accela.ACA.CustomizeAPI;

namespace Accela.ACA.Dashboard
{
    public partial class Dashboard : BaseCustomizeComponent
    {
    }
}
```

5. Implement the desired functions using the exposed APIs. For the complete list of APIs exposed for use, see [Table 20: APIs Exposed by ComponentService.dll on page 520](#).

The following steps use jQuery to implement the function of the dashboard.

- a. Create a “Handle” directory file in the dashboard project.
- b. Create a handler file, for example, “Asynchronous.ashx” under the “Handle” directory.



- c. Locate the `ProcessRequest` method in `Asynchronous.ashx`.
- d. Call the APIs in the `ProcessRequest` method for accessing the data in Citizen Access, for example, the data of paying fines and paying fees. Do the following.

- 1) Create a DataProvider class for calling the CapService.GetMyRecords API to get the records list of the current user.

```
namespace Accela.ACA.Dashboard
{
    /// <summary>
    /// </summary>
    public class DataProvider
    {
        /// <summary>
        /// User context
        /// </summary>
        Usercontext context;

        /// <summary>
        /// Get My Record List
        /// </summary>
        /// <param name="moduleName"></param>
        /// <returns></returns>
        public List<SimpleCapWrapperModel> GetMyRecordList(string moduleName)
        {
            CapService capService = new CapService(context);
            List<SimpleCapWrapperModel> myCapList = capService.GetMyRecords(moduleName);

            return myCapList;
        }
    }
}
```

- 2) Load DataProvider in Dashboard.aspx.cs, and pass the records list to Session[ "DashBordData" ].

```
namespace Accela.ACA.Dashboard
{
    public partial class Dashboard : BaseCustomizeComponent
    {
        private static DataProvider dataProvider = null;

        /// <summary>
        /// PageLoad Event Handler
        /// </summary>
        protected void Page_Load(object sender, EventArgs e)
        {
            var licenseIssList = dataProvider.GetMyRecordList("Licenses");
            var servicesIssList = dataProvider.GetMyRecordList("Services");
            var issList = new List<SimpleCapWrapperModel>();
            issList.AddRange(licenseIssList);
            issList.AddRange(servicesIssList);
            Session["DashBordData"] = issList;
        }
    }
}
```

- 3) Add the code for getting the PayFines and PayFee data in Asynchronous.ashx.cs.  
Use the DataUtil class to filter the data.

```
/// <summary>
/// Process Request.
/// </summary>
/// <param name="context">The http context.</param>
public void ProcessRequest(HttpContext context)
{
    var dataProvider = new DataProvider((UserContext)HttpContext.Current.Session["UserContext"]);
    Logger = new LogUtil((UserContext)HttpContext.Current.Session["UserContext"]);

    try
    {
        var dataProviderUtil = new DataProviderUtil();
        var isEngLish = dataProvider.GetUserPreferredCulture().Equals("en-US");

        if (HttpContext.Current.Session["DashBordData"] == null)
        {
            OutPutPromptText(dataProvider, "aca_dashboard_pendingsrecords_norecord");
            return;
        }

        var issList = (List<SimpleCapWrapperModel>)HttpContext.Current.Session["DashBordData"];
        dataProviderUtil.CreateDataSource(issList);

        switch (HttpContext.Current.Request.QueryString["DataType"])
        {
            case "PayFines":
                OutPutPayFinesOrPayFee(dataProviderUtil, dataProvider, isEngLish, false);
                break;
            case "PayFee":
                OutPutPayFinesOrPayFee(dataProviderUtil, dataProvider, isEngLish, true);
                break;
        }
    }
    catch (Exception ex)
    {
        OutPutPromptText(dataProvider, "aca.error.data.validation");

        StringBuilder sb = new StringBuilder();
        sb.Append(ex.Message);
        sb.Append("\r\nSOURCE: " + ex.Source);
        sb.Append("\r\nTARGETSITE: " + ex.TargetSite);
        sb.Append("\r\nSTACKTRACE: " + ex.StackTrace);
        Logger.Error(sb.ToString());
    }
}

/// <summary>
/// create data structure for all cap list
/// </summary>
/// <returns>data table for cap list</returns>
public void CreateDataSource(List<SimpleCapWrapperModel> capList)
{
    if (capList == null || capList.Count == 0)
    {
        return;
    }

    var realCapList =
        capList.Where(
            c =>
            String.IsNullOrWhiteSpace(c.CapClass) ||
            "COMPLETE".Equals(c.CapClass, StringComparison.OrdinalIgnoreCase));

    foreach (var cap in realCapList)
    {
        if (IsFine(cap))
        {
            if (cap.HasUnpaidFees)
            {
                //Logger.Error("cap.HasUnpaidFees -> " + cap.HasUnpaidFees);
                this._fines.Add(cap);
            }

            continue;
        }

        if (IsFee(cap))
        {
            this._fees.Add(cap);
        }
    }
}
```

```
/// <summary>
/// </summary>
/// <param name="capModel"></param>
/// <returns></returns>
private bool IsFine(SimpleCapWrapperModel capModel)
{
    //Logger.Error("IsFine-> capModel.CapType.Alias =" + capModel.CapType.Alias + ",Result= " + isFine);
    return capModel.CapType != null
        && "Licenses".Equals(capModel.CapType.Group, StringComparison.OrdinalIgnoreCase)
        && "Fines".Equals(capModel.CapType.Type, StringComparison.OrdinalIgnoreCase)
        && "Licenses".Equals(capModel.Module, StringComparison.OrdinalIgnoreCase);
}

/// <summary>
/// </summary>
/// <param name="capModel"></param>
/// <returns></returns>
private bool IsFee(SimpleCapWrapperModel capModel)
{
    bool isFee = false;
    if (capModel.HasUnpaidFees)
    {
        isFee = !"Cancelled".Equals(capModel.CapStatus, StringComparison.OrdinalIgnoreCase) &&
            !"Declined".Equals(capModel.CapStatus, StringComparison.OrdinalIgnoreCase);
    }
    //Logger.Error("IsFee-> capModel.HasUnpaidFees =" + capModel.HasUnpaidFees + ", capModel.CapStatus =
    return isFee;
}
```

- 4) Add a ready() method in the HTML file of Dashboard.ascx.

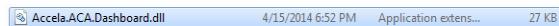
```
<script type="text/javascript">
$(document).ready(function () {
    $.ajax({
        url: "Customize/UserControls/Asynchronous.ashx?DataType=PayFines",
        context: document.body,
        cache: false,
        success: ExpandPayFines
    });

    function ExpandPayFines(data) {
        $('#divLoaddingPayFines').hide();
        $('#divPayFinesBody').html(data);
        i = i + 1;
    }

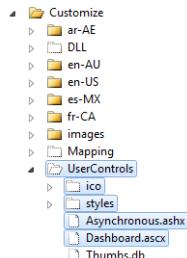
    $.ajax({
        url: "Customize/UserControls/Asynchronous.ashx?DataType=PayFee",
        context: document.body,
        cache: false,
        success: ExpandPayFee
    });

    function ExpandPayFee(data) {
        $('#divLoaddingPayFee').hide();
        $('#divPayFeeBody').html(data);
        i = i + 1;
    }
});
</script>
```

- 5) Compile the project and generate a DLL file dashboard.dll.  
6) Copy the generated dashboard.dll to <ACA server path>\Web\Bin.



- 7) Copy Dashboard.ascx and Asynchronous.ashx and other related resource files to <ACA server path>\Web\Customize\UserControls.



6. Configure the Welcome Global page and the Welcome Registered page to upload the component content on to the pages.
  - a. Navigate to **Citizen Access Setup > General > Page**.
  - b. open the **Welcome Global** page and the **Welcome Registered** page.
  - c. Scroll down to the bottom of the Welcome Global page.

*Citizen Access Setup displays the “Click here to edit customized content properties” area.*

- d. Click the “Click here to edit customized content properties” area to highlight it.
- e. Fill the **Path** value with “*Dashboard.ascx*”.

The screenshot shows the 'Welcome Global' page in the Citizen Access Setup interface. On the left, there's a 'Login' section with fields for 'User Name or E-mail', 'Password', and 'Remember me on this computer'. Below it is a 'What would you like to do today?' section with various service links. On the right, there's a 'Section Properties' panel with a table:

Name	Value
Name	Customize Component
Path	Dashboard.ascx
Visible	true

- f. Set the **Visible** value to “true”.
  - g. Click **Save** button.
7. Log in to Citizen Access with a user account to check whether the custom component applies to the Welcome Global page.

*The customized component area in the Welcome Global page displays the dashboard which provides the Pay Fee and Pay Fines data.*

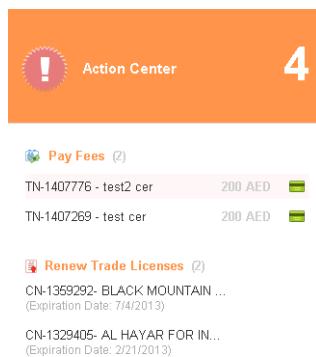


Table 20: APIs Exposed by ComponentService.dll

API Class/API Name	Description and Example
<b>CapService/ GetMyRecords</b>	<p>This API gets the records that belong to the specified module.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b> moduleName / string / Required / Specify module</p> <p><b>Returned Type:</b> List&lt;SimpleCapWrapperModel&gt;</p> <p><b>Example API Call:</b></p> <pre>CapService capService = new CapService(context); List&lt;SimpleCapWrapperModel&gt; myCapList = capService.GetMyRecords(moduleName);</pre>
<b>CapService/ GetCapByAltID</b>	<p>This API gets the record information per the specified record Alt ID.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b> capAltID / string / Required / Specify AltID sAgencyCode / string / Required / Specify AgencyCode</p> <p><b>Returned Type:</b> CapWrapperModel</p> <p><b>Example API Call:</b></p> <pre>CapService capService = new CapService(context); CapWrapperModel capModel = capService.GetCapByAltID("13ACC- 000000254F", "SACCO");</pre>

**Table 20: APIs Exposed by ComponentService.dll (Continued)**

API Class/API Name	Description and Example
<b>LabelService/ GetLabelTextByKey</b>	<p>This API gets the value of the specified label key.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b></p> <p>labelKey / string / Required / LabelKey</p> <p><b>Returned Type:</b></p> <p>string</p> <p><b>Example API Call:</b></p> <pre>LabelService labelService = new LabelService(context); return labelService.GetLabelTextByKey(key);</pre>
<b>FeeService/ GetTotalBalanceAmo unt</b>	<p>This API gets the total fee amount in the specified record.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b></p> <p>agencyCode / string /Required / AgencyCode</p> <p>id1 / string / Required / CapId1</p> <p>id2 / string / Required / CapId2</p> <p>id3 / string / Required / CapId3</p> <p><b>Returned Type:</b></p> <p>double</p> <p><b>Example API Call:</b></p> <pre>FeeService feeService = new FeeService(context); return feeService.GetTotalBalanceAmount( "SACCO" , "13ACC" , "00000" , "0254F" );</pre>
<b>I18NService/  GetUserPreferredCul ture</b>	<p>This API gets the language used in the current website.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b></p> <p>Null</p> <p><b>Returned Type:</b></p> <p>string</p> <p><b>Example API Call:</b></p> <pre>I18NService i18nService = new I18NService(context); return i18nService.GetUserPreferredCulture();</pre>

**Table 20: APIs Exposed by ComponentService.dll (Continued)**

API Class/API Name	Description and Example
<b>LicenseProfessionalService/GetLicenseProfessionalList</b>	<p>This API gets the licensed professional information of the specified record.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b></p> <p>agencyCode / string / Required / AgencyCode</p> <p>id1 / string / Required / CapId1</p> <p>id2 / string / Required / CapId2</p> <p>id3 / string / Required / CapId3</p> <p><b>Returned Type:</b></p> <p>List&lt;LicenseProfessionalWrapperModel&gt;</p> <p><b>Example API Call:</b></p> <pre>LicenseProfessionalService licenseProfessionalService = new LicenseProfessionalService(context); return LicenseProfessionalService.GetLicenseProfessionalList("SACCO" ,"13ACC", "00000", "0254F");</pre>
<b>LogService/Debug</b>	<p>This API writes the debug log to the server.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b></p> <p>tag / string / Required / Action trigger</p> <p>message / object / Required / Log content</p> <p><b>Returned Type:</b></p> <p>void</p> <p><b>Example API Call:</b></p> <pre>LogService logService = new LogService(userContext); logService.Debug("Dashboard", message);</pre>
<b>LogService/Error</b>	<p>This API writes the error log to the server.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b></p> <p>tag / string / Required / Action trigger</p> <p>message / object / Required / Log content</p> <p><b>Returned Type:</b></p> <p>void</p> <p><b>Example API Call:</b></p> <pre>LogService logService = new LogService(userContext); logService.Error("Dashboard", message);</pre>

Table 20: APIs Exposed by ComponentService.dll (Continued)

API Class/API Name	Description and Example
<b>LogService/Info</b>	<p>This API writes the info log to the server.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b> tag / string / Required / Action trigger message / object / Required / Log content</p> <p><b>Returned Type:</b> void</p> <p><b>Example API Call:</b></p> <pre>LogService logService = new LogService(userContext); logService.Info("Dashboard", message);</pre>
<b>LogService/Fatal</b>	<p>This API writes the fatal log to the server.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b> tag / string / Required / Action trigger message / object / Required / Log content</p> <p><b>Returned Type:</b> void</p> <p><b>Example API Call:</b></p> <pre>LogService logService = new LogService(userContext); logService.Fatal("Dashboard", message);</pre>
<b>WorkflowService/GetWorkflowTasks</b>	<p>This API gets the task names in the specified record.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b> paddingCaps / List&lt;SimpleCapWrapperModel&gt; / Required / To-be-searched Cap set</p> <p><b>Returned Type:</b> string[]</p> <p><b>Example API Call:</b></p> <pre>var workflowService = new WorkflowService(context); string[] workFlowTasks = workflowService.GetWorkflowTasks(paddingCaps);</pre>
<b>WorkflowService/ConcatStringWithSplitChar</b>	<p>This API concatenates specified strings.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b> args / IEnumerable&lt;string&gt; /Required/ To-be-assembled data set splitChar / string / Required / Field separator</p> <p><b>Returned Type:</b> string</p> <p><b>Example API Call:</b></p> <p>eg: If args[0] = "a",args[1]="b",args[2]="c", the result is "a b c"; If args[0] = "",args[1]="b",args[2]="c", the result is "b c";</p>

**Table 20: APIs Exposed by ComponentService.dll (Continued)**

API Class/API Name	Description and Example
<b>ASITDrillDownService/GetASITUITableFromCurSession</b>	<p>This API gets the ASI table information with the specified table key in the records that belong to the specified module.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b></p> <p>sTableKey / string / Required / Table Key sModuleName / string / Required / Module Name</p> <p><b>Returned Type:</b></p> <p>ASITWrapperModel</p> <p><b>Example API Call:</b></p> <pre>ASITWrapperModel asitWrapperModel = ASITDrillDownService.GetASITUITableFromCurSession("sTableKey" , "sModuleName");</pre>
<b>ASITDrillDownService/GetFirstDrillDownListOfASIT</b>	<p>This API gets the first-level drilldown information in the specified ASI table group and subgroup of the specified agency.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b></p> <p>sAgencyCode / string / Required / AgencyCode sASITGroupName / string / Required / GroupName sASITSubGroupName / string / Required / SubGroupName</p> <p><b>Returned Type:</b></p> <p>DrillDownSeriesWrapperModel</p> <p><b>Example API Call:</b></p> <pre>ASITDrillDownService asitDrillDownService1 = new ASITDrillDownService(userContext)  DrillDownSeriesWrapperModel aSWS = asitDrillDownService1.GetFirstDrillDownListOfASIT(agencyCode, parentGroupName, subGroupName);</pre>

**Table 20: APIs Exposed by ComponentService.dll (Continued)**

API Class/API Name	Description and Example
<b>ASITDrillDownService/GetNextDrillDownListOfASIT</b>	<p>This API gets the next-level drilldown information in the specified ASI table group and subgroup of the specified agency.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b></p> <ul style="list-style-type: none"> <li>sAgencyCode / string / Required / Agency Code</li> <li>selectedIdsOfLastDrillDown / string[] / Required / To-be-got column</li> <li>sSeriesId / string / Required / Specify series</li> </ul> <p><b>Returned Type:</b></p> <p>DrillDownSeriesWrapperModel</p> <p><b>Example API Call:</b></p> <pre>ASITDrillDownService asitDrillDownService1 = new ASITDrillDownService(userContext)  DrillDownSeriesWrapperModel aSWS = asitDrillDownService1.GetNextDrillDownListOfASIT(agencyCode, (string[])columnIDPathList.ToArray(typeof(string)), seriesId);</pre>
<b>ASITDrillDownService/SearchDrillDownItem</b>	<p>This API searches for drilldown information according to the specified criteria.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b></p> <ul style="list-style-type: none"> <li>sAgencyCode / string / Required / Agency Code</li> <li>sASITGroupName / string / Required / ASIT Group Name</li> <li>sASITSubGroupName / string / Required / ASIT Sub Group Name</li> <li>sSearchValue / string / Required / Search Content</li> </ul> <p><b>Returned Type:</b></p> <p>List&lt;DrillDownItemWrapperModel&gt;</p> <p><b>Example API Call:</b></p> <pre>ASITDrillDownService asitDrillDownService1 = new ASITDrillDownService(userContext)  List&lt;DrillDownItemWrapperModel&gt; lst = asitDrillDownService1 .SearchDrillDownItem("SACCO", "GroupName", "SubGroupName", "Search Content");</pre>

**Table 20: APIs Exposed by ComponentService.dll (Continued)**

API Class/API Name	Description and Example
<b>ASITDrillDownService</b> <i>e/</i> <b>UpdateSelectedDrillDown</b>	<p>This API updates the specified ASI table drilldown item.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b></p> <pre>finalColumnNames / Dictionary&lt;string, int&gt; / Required / selectIdList / List&lt;string[]&gt; / Required / sGroupName / string / Required / sSubGroupName / string / Required / asitUIKey / string[] / Required /</pre> <p><b>Returned Type:</b></p> <p>bool. true: success; false: failed</p> <p><b>Example API Call:</b></p> <pre>ASITDrillDownService asitDrillDownService1 = new ASITDrillDownService(userContext)  bool result = asitDrillDownService1 .UpdateSelectedDrillDown("finalColumnNames", "selectIdList", "s GroupName", "sSubGroupName", "asitUIKey");</pre>
<b>ASITDrillDownService</b> <i>e/</i> <b>BuildSuccessfullyAddASITRowScript</b>	<p>If an ASI table has several sub tables, when users add a row into a sub table with drill down, this API builds the script to be called at users' click of the Finish button, for refreshing the correct sub table in the ASI table.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b></p> <p>Null</p> <p><b>Returned Type:</b></p> <p>StringBuilder</p> <p><b>Example API Call:</b></p> <pre>ASITDrillDownService asitDrillDownService1 = new ASITDrillDownService(userContext)  StringBuilder sb = asitDrillDownService1 .BuildSuccessfullyAddASITRowScript();</pre>
<b>ASITDrillDownService</b> <i>e/</i> <b>GetASIT_POSTEVENT_SYNCUICOPYDATA</b>	<p>This API gets the constant ASIT_POSTEVENT_SYNCUICOPYDATA from Citizen Access.</p> <p><b>Parameter (Name / Type / Required or Optional / Description):</b></p> <pre>dataType / UIDataType / Required / Data Type dataKey / string[] / Required / Data Key</pre> <p><b>Returned Type:</b></p> <p>UITable[]</p> <p><b>Example API Call:</b></p> <pre>ASITDrillDownService asitDrillDownService1 = new ASITDrillDownService(userContext)  UITable[] arrUI = asitDrillDownService1 .GetASIT_POSTEVENT_SYNCUICOPYDATA("dataType", "dataKey")</pre>

**APPENDIX C:**

# VARIATIONS FOR CREATING RECORDS

This appendix explains the different methods to process record creation. The creation of records is one of the basic functions governing how your agency does business with your customers. Citizen Access provides a default method for creating records. You can modify the default record creation process to accommodate the demands of agencies to create records that have child records, agencies that implement processes for multiple agencies, or agencies that create amendment records. Citizen Access also provides the copy record functionality for public users to create new record by copying an existing record. You can use the default record creation process to create records without child records, you can also modify the process to allow users to create child records during parent record creation. You can clone an existing record to create a new record.

This appendix explains how to modify a default record creation process to be a parent-child record creation process, how to copy an existing record to create a new record. This appendix also provides an overview of the multiple agency record creation process and the creation of an amendment record.

## Topics

- [Creating a Parent-Child Record](#)
- [Copying an Existing Record](#)
- [Creating Records for Multiple Agencies](#)
- [Configuring Amendment Record Functionality](#)

## Creating a Parent-Child Record

You can modify a default record creation process, which does not involve child records, to be a parent-child record creation process. The parent-child record creation process requires public users to create at least one child record during parent record creation. Child records work as part of the application contents to the parent record.

The parent-child record creation is useful if users want to complete a task which comprises several sub-tasks, for example, a clinic applies for a permit to throw away their medical wastes, such as blood or surgical specimens. In this example, the parent record is the application to throw away the medical wastes, while the child records are the specific contents of the medical wastes to be thrown away, such as blood and surgical specimens.

In the parent-child record creation process, public users can select child record types from the ASI Table section. When users move to the Associated Form step, EMSE scripts automatically generate child records and display them in the Associated Form step.

**Note:** *Public users must pay for the parent and child records together in the Shopping Cart in Citizen Access and there is only one receipt for the payment. If users pay for any of the records through Civic Platform, they must pay for the remaining records through Civic Platform.*

To set up the parent-child record creation process, in addition to completing the configurations described in [Chapter 14: Creating Records on page 284](#), you must also complete several other configurations as described below.

### To implement creation of parent-child records

1. Complete all the configurations described in [Chapter 14: Creating Records on page 284](#).
2. Make sure you mark the **Enable Associated Forms** option in the record type setting in Civic Platform. See [Configuring Record Type Settings on page 288](#).

In the Associated Forms step, users must complete creation of all child records before moving forward to the next step, Pay Fees.

*Citizen Access adds the Associated Forms step to the parent application creation process to display the child records.*

3. Add the following value and value description to the Standard Choice ACA\_CONFIGS. For more information on configuring the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

<b>Standard Choice Value</b>	ASSOCIATED_FORMS_ASIT_RELATIONSHIP_FIELD
<b>Value Desc</b>	RelationshipID The Value Desc is used in the ASI table in the next step.

**Standard Choices Item Name:** ACA\_CONFIGS  
**Description:** ACA Configuration  
 (250 char max)

**Status:**  Enable  Disable  
**Type:**  System Switch  Shared drop-down  EMSE

Standard Choices Value	Value Desc	Active
ACA_SITE	https://aca-vm1.accela.com/710/COSD/admin/default.aspx	<input checked="" type="checkbox"/> <a href="#">Delete</a>
ACCOUNT_MANAGEMENT_EI	YES	<input checked="" type="checkbox"/> <a href="#">Delete</a>
ALLOW_EXPORTING_TO_CS	N	<input type="checkbox"/> <a href="#">Delete</a>
ALL_USER_SCHEDULE_INSP	NO	<input checked="" type="checkbox"/> <a href="#">Delete</a>
APCD_DISPLAY_MAP	No	<input type="checkbox"/> <a href="#">Delete</a>
APCD_INSPECTION_DISPLAY	Yes	<input checked="" type="checkbox"/> <a href="#">Delete</a>
ASI_LABEL_WIDTH	50	<input checked="" type="checkbox"/> <a href="#">Delete</a>
ASSOCIATED_FORMS_ASIT_	RelationshipID	<input checked="" type="checkbox"/> <a href="#">Delete</a>
AUTO_POPULATE_STATE	YES	<input checked="" type="checkbox"/> <a href="#">Delete</a>

4. Create an ASI table and configure it as described in the following substeps.
- a. Create a column and enter the Column Name to match the Value Desc of the *Standard Choice Value* you just created. Set the Type to *Text* and set the ACA Displayable to *Hidden*.

The column is used to store the child record IDs that are hidden from users when users move to the Associated Forms step in the parent record creation process.

**Application Specific Info Table**  
 Use this form to edit Application Specific Info Table.

**Application Spec Info Table Group Code:** HAZMAT  
**Application Spec Info Table Subgroup:** HAZMAT

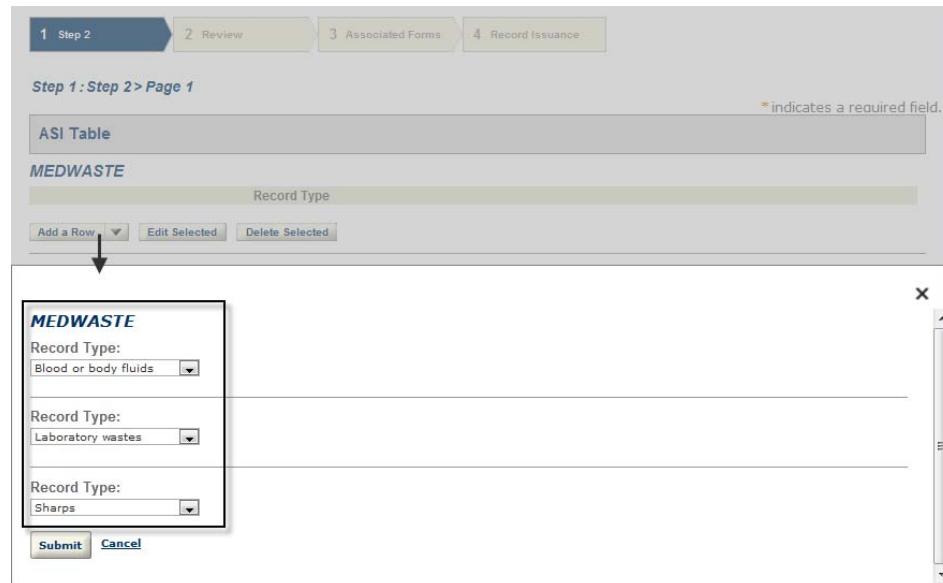
**Apply changes to this subgroup only:**   
 **Apply changes to all subgroups:**

Column Name	Type	Display Order	Default Value	Required	Req for Fee Calc	Supervisor Edit Only	Searchable	Display Len	ACA Displayable	Status
Record Type	DropdownList	1		No	No	No	No	No	Yes	Enabled
RelationshipID	Text	2		No	No	No	No	No	Hidden	Enabled

[Update](#) [Add](#) [Cancel](#)

- b. Create another column. Set the Type to *Drop-down List*. Add the desired existing record types to the drop-down list, or import the record types from other existing shared drop-down lists.

Citizen Access displays the ASI Table section during the record creation process. Users click the Add Rows button and select the child record types on the pop-up window.



- c. Associate the ASI table to the parent record type.

For more information on ASI tables, see “Working with ASI Tables” section in the “Working with Application Specific Information” chapter in the *Accela Civic Platform Administrator Guide*.

- d. Add the component of ASI table to the page flow of the parent record type to display the ASI Table section in the record creation process.

For information on how to add a component to a page flow, see [Working with Components on page 148](#).

5. Define an EMSE script.

You must define a script and associate it to the *ApplicationSubmitAfter* event to auto-generate the child records based on the selected child record types as users move to the Associated Forms step in the parent record creation process. For information on writing scripts, see the “Event and Script Setup” chapter in the *Accela Civic Platform Scripting Guide*.

6. Enable Shopping Cart in the Global Settings page in the ACA Administration site.

For more information about shopping cart, see [Cart Settings on page 71](#).

- a. Mark the **Enable Cart** option.

- b. Set the **Payment Transaction Settings** to the Transaction per Cart mode.

*Citizen Access lists all the fees of the parent record or the child records in the Pay Fees page.*

**Medical Waste Management Plan****Step 5: Pay Fees**

Listed below are preliminary fees based upon the information you've entered. Some fees are based on the quantity of work items installed or repaired. Enter quantities where applicable. The following screen will display your total fees.

**Application Fees**

Fees	Qty.	Amount
Blood or body fluids		\$100.00
Cost on weight	200	\$100.00
Sharps		\$100.00
Cost on weight	200	\$100.00
Laboratory wastes		\$50.00
Cost on weight	100	\$50.00
Laboratory wastes		\$75.00
Cost on weight	150	\$75.00

**TOTAL FEES**

Note: This does not include additional inspection fees which may be assessed later.

\$325.00

[Recalculate](#)

## Copying an Existing Record

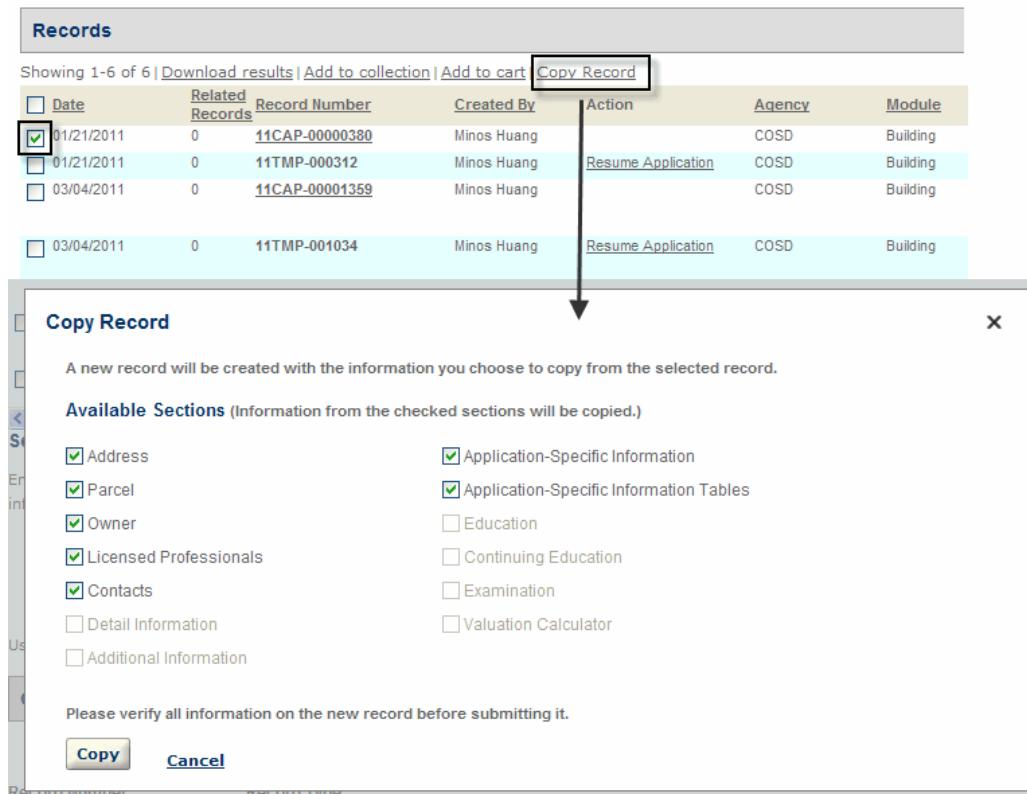
Public users can clone an existing (parent) record to create a new record of the same record type on pages, such as the Record Detail page, the Receipt page, the record list, and the record search list. When public users clone a record, they specify the source record content they want to use to populate the new record. See [Figure 123: Copying Record](#). The selected source content is populated in the corresponding sections of the application intake form. After selecting the desired source content, public users must go through the record creation process to modify the populated information as needed, fill any blank fields, and complete the new record creation.

**Note:** *Public users may find that some of the source content options are disabled. That is because the page flow associated with the record type does not contain those components, consequently the application intake form does not contain those sections, and public users do not have the chance to select them. For detailed information about adding components to a page flow, see [Working with Components](#) on page 148.*

For Citizen Access that supports multi-agency services, when public users copy a record for a sub-agency, if the sub-agency does not have any page flow associated with the record type, public users create the cloned record with the main agency's page flow that is used for creating the parent record. If sub-agency has its own page flow associated with the record type, public

users create the cloned record based on the sub-agency's page flow. To learn how to associate a page flow with a record, see [Associating Record Types With a Page Flow on page 135](#). For more information about ACA serving multiple agencies, see [Creating Records for Multiple Agencies](#).

**Figure 123: Copying Record**



#### Follow the task list below to implement the Copy Record functionality

- Enable Copy Record functionality. See [Copy Record Settings on page 110](#).
- Customize the web page, Copy Record, in the Apply for a Permit folder. For instructions on configuring a web page, see [Chapter 10: Working with Web Pages on page 160](#).

## Creating Records for Multiple Agencies

This section explains the details of record creation when multiple agencies offer services to public users through ACA. When Civic Platform is in a multi-agency configuration, your agency requires the implementation of ACA. This appendix provides the basic conceptual flow for the process to create a record, the configurations for setup, and the impact of configurations on the user interface. This special way to create records is particularly useful if a main agency (State) wants to establish themselves as a hub for sub-agency (County or City) information where their customers can have access to view or perform tasks associated with any of the sub-agency levels. This allows public users to manage records from the multiple agencies from a single login. For example, a business owner's building permit can be accessible with one ACA login.

where services associated with the city, county, and state are tracked and applied to their application. The services may include maintenance with waterlines or structural upgrades.

To set up the record creation process, you must perform multiple configurations within Civic Platform and Citizen Access. Follow the steps in [Configurations for Record Creation and the Impact on the User Interface on page 536](#) for a complete list of configurations.

You must perform all configurations in this appendix for a successful record creation process. The configurations enable agencies to share information in a common database and allow public users access to records from multiple agencies in one location.

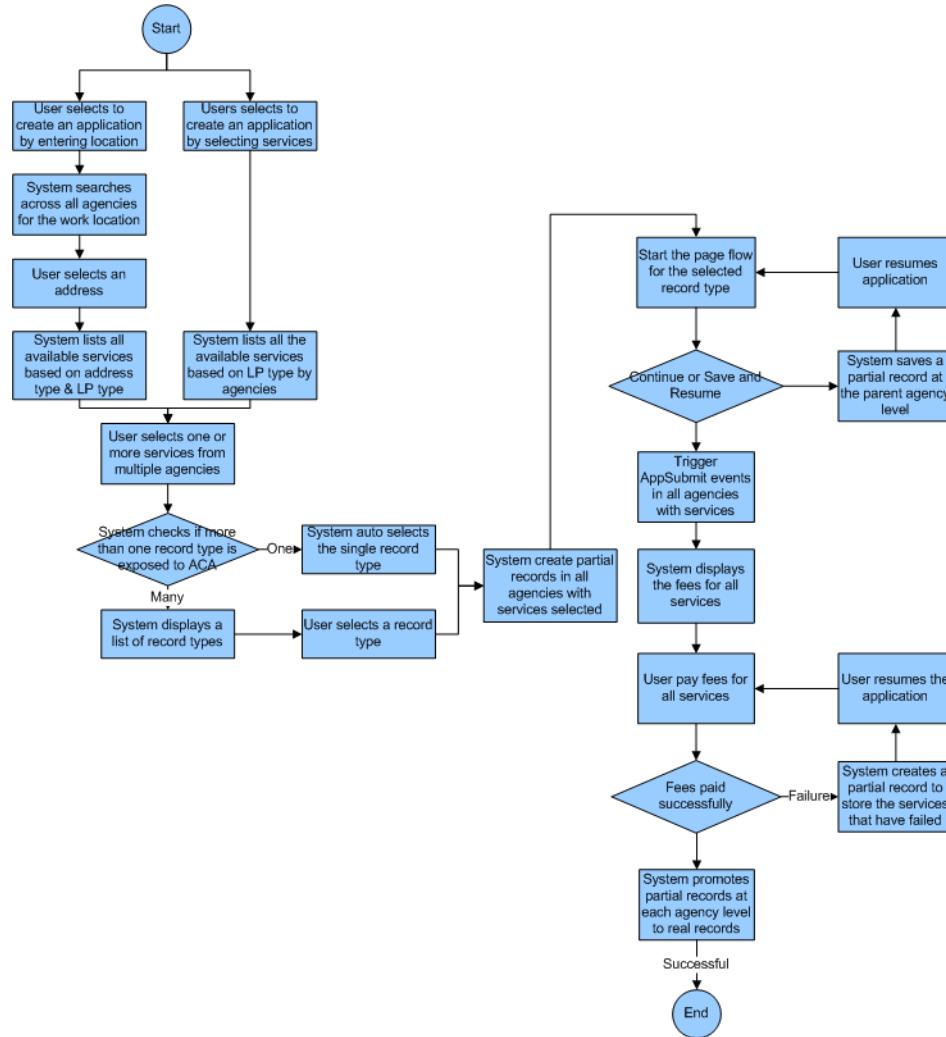
### Topics

- [Understanding the Process for Creating a Record](#)
- [Configurations for Record Creation and the Impact on the User Interface](#)
- [Sharing Information between Agencies](#)
- [Enabling Associated Forms for a Main Agency](#)
- [Delegate User Administrator](#)
- [Multiple Agency Service Management](#)
- [Associating a Logo with an Agency](#)

## Understanding the Process for Creating a Record

When a public user creates a record involving multiple-agencies in ACA, they move through a series of processes before completion. These next few paragraphs explain the steps that the public user takes during record creation and the Civic Platform responses. Refer to [Figure 124: Diagram of the Process of Creating Records](#) for a diagram. This methodology is required for record creation involving multiple agencies services from a single ACA site. This process can, however, be implemented with an individual agency unaffiliated with other locations.

Figure 124: Diagram of the Process of Creating Records



Citizen Access provides the public user with an interface to create a record online. A public user goes to the agency website and logs in to ACA to access the ACA Home Page. There are two hyperlinks for users to start the record creation process:

- “Create an Application” hyperlink

When clicked, this hyperlink directs users to select a work location which an address search across multiple agencies can obtain. When the address is selected, Civic Platform fires an EMSE (Event Manager and Script Engine) script to filter the available services based on the address type and license type. The Select Services section lists all the service options by agencies. The public user can select one or more available services from the list. See [Figure 125: Service Options available by Work Location](#).

**Figure 125: Service Options available by Work Location**

Address	Description	City	State	Zip	Parcel	Owner	Action
20120810 1/4 20120831 3/4 NE Keyuan Load AV, APT 122 165, Shenzhen Nanshan CA 51800, Shennan Load		Shenzhen	CA	51800	20120810		Select

- “Create an Application by Selecting Services” hyperlink

When clicked, this hyperlink directs users to select one or more services across multiple agencies. See [Figure 126: Service Options available by Agencies](#). The Select Services section lists all the service options by agencies, which include all the services that do not

relate to any license types, and the services (if any) that are associated with the license type(s) of the public user.

Figure 126: Service Options available by Agencies

The screenshot shows a web interface for selecting services. At the top, there are navigation tabs: Home, Building - LA, Service Request, Planning, AMS, and Licenses. Below the tabs is a horizontal menu with links: Manage my Permits, Create an Application by Selecting Services - QA, Apply for a Permit (Year 2011) - QA, Obtain a Fee Estimate, and more. A large central area is titled "Select Services". It contains two sections: "DCA" and "DOHMH". Under "DCA", there are checkboxes for Amusement Arcade License, Auction House License, Auctioneer License, Cabaret License, Garage License, Laundry License, and Parking Lot License. Under "DOHMH", there is a single checkbox for Tattoo License. At the bottom left is a "Continue Application" button.

If users select multiple services, or select a service whose record type does not relate to any page flow, users must select a record type before starting the application creation process.

The public user follows the page flow to complete and confirms the application for submission. At this point the public user may continue on to view the estimation of fees for the records. See [Figure 129: Agency Logo View on the Fee Detail page in Citizen Access](#).

Civic Platform is configurable to validate any license information through EMSE at this point. After validation, the public user makes a full or partial payment. The issuance and confirmation of payment displays. Once a sub-agency record is paid in full, it is disassociated from the main placeholder record type. When all records are paid in full, the main placeholder record type is removed and each sub-agency record stands alone at the associated sub-agency level ending the record creation process.

A public user views all of the records that are associated with him across multiple agencies in the My Record list. He can also search records across multiple agencies. The search results also displays all associated records across multiple agencies.

## Configurations for Record Creation and the Impact on the User Interface

The configurations required to implement the creation of records offered for multiple agencies and their services include features associated with multi-agency services, sub-agency record types, and reports. Each of these features may require Standard Choice and/or Functional Identification (FID) configurations. The most critical element of the process is the main record type which works as a place holder for sub-agency records and resides at the main agency level. The place holder record type does not require ASI (application-specific information), workflow, or fee setup because it merely functions as a storage place. You must configure a

page flow for the place holder record type. You must also configure the record type filter in Citizen Access so that this main record type is the only available record type available to public users. This forces the public user to initially select the place holder record type so the record types for the sub-agency services can be associated with it moving the group of records together through the record creation process. The instructions below provide the configurations for the record creation feature and their impact on the user interface.

### To configure the ability to create records

1. Configure any delegate users to have the ability to manage multiple agencies and their services. Enable this feature for public users so that they have access to multiple agency services when creating a record online. For complete configuration information, refer to [Delegate User Administrator on page 543](#).
2. Configure the ability for multiple agencies to share information in a common database. This is particularly useful when you search for addresses across multiple agencies when selecting a work location. For complete configuration information, refer to [Sharing Information between Agencies on page 539](#).
3. Enter the official website URL on the Global Settings page. For complete configuration information, refer to [Official Website on page 57](#) in the [Chapter 4: Global Settings Configuration Page on page 57](#).
4. Configure the multi-service functionality for multiple agencies. This includes the configuration for the items listed below:
  - a. Configure a record type at the main agency level. This record type does not require Application Specific Information (ASI), workflow, or fee setup.
  - b. Configure any record types at the sub-agency level.
  - c. Configure ASI groups for sub-agency services. For example, ASI group plumbing services with sub-group water heater. For more examples, refer to [Table 25: Services Example Configurations on page 556](#).

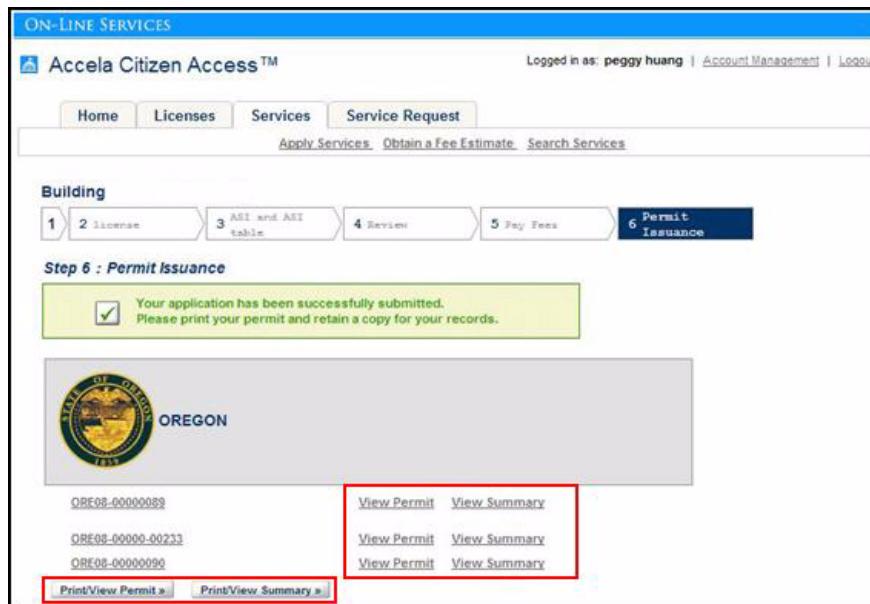
**Note:** *You must define the ASI sub-group at both the parent and sub-agency level and make sure they match. At the parent level the ASI sub-group information must exist in the database but it does not need to relate to a record type.*

- d. Set up the multi-agency services and associate them to record types, licensed professionals, addresses. You may also configure the service locks. For basic configuration information refer to [Multiple Agency Service Management on page 553](#).
  - e. Associate any logos with an agency. See [Figure 129: Agency Logo View on the Fee Detail page in Citizen Access](#). For complete configuration information, refer to [Associating a Logo with an Agency on page 566](#).
5. Configure the record creation task on the Citizen Access home page.

- a. For multiple agencies, mark the “Create an Application” modular task, or an equivalent task such as “Apply for a Permit” in the Feature Settings page of the agency administration site.
- b. For the main agency, mark the “Create an Application by Selecting Services” modular task in the Feature Settings page of the agency administration site.

For configuration information, see [Configuring Required Registration on page 85](#). For viewing the pages after users select the task, see [Figure 125: Service Options available by Work Location on page 535](#) and [Figure 126: Service Options available by Agencies on page 536](#).

6. Receipt and permit summary configurations.
  - a. Configure the receipt and permit summary in Report Manager. You must define receipts for each sub-agency and main agency. You must also define an overall multi-agency receipt that includes all sub-agency information at the main agency level. You can refer to [Setting Report Viewable Permissions on page 481](#).
  - b. Associate the receipts and the permit summary to buttons in Citizen Access. For complete configuration information, see [Associating Reports with Print/View Buttons on page 475](#).



7. Configure the page-flow for the main agency placeholder record type. For complete configuration information, see [Chapter 9: Page Flow Configuration on page 132](#).
8. Configure the record type filter to exclude all records but the main agency placeholder record type. For complete configuration information, refer to [Record Type Filters on page 122](#).
9. According to your agency's requirement, enable or disable the associated forms for a main agency. For complete configuration information, see [Enabling Associated Forms for a Main Agency on page 541](#).

## Sharing Information between Agencies

Civic Platform provides a way for multiple agencies to share address, parcel, owner, licensed professional, and contact information. Consolidating APO, licensed professional, and contact information allows users to perform searches or update information across agencies. It also limits duplicate information in various agency databases. For complete information about how to consolidate licensed professionals, see [Synchronizing Licensed Professional Data between Agencies on page 562](#).

### Topics

- [Sharing Addresses, Parcels, and Owners \(APO\)](#)
- [Sharing Contacts](#)

## Sharing Addresses, Parcels, and Owners (APO)

This feature is required for the implementation of creating records for multiple agencies. During the record creation process, a public user searches and selects a work location based on addresses available in the common database.

For example, two agencies in Oregon, Sandy and Portland, want to share their data with an administrator and the public user group from the State of Oregon. Each city grants user access to their agency data through both FID configuration and delegate user setup to allow users to search addresses across these agencies. Depending on the users' privileges and settings, they can view and edit the other agencies data. The user and agency that created the APO record is preserved. For more information about granting user access to a common database, refer to [Delegate User Administrator on page 543](#).

The sharing APO information feature requires Standard Choices configuration. You must set the **APO\_CHECK\_DUPLICATE** Standard Choice to control the agency data filter and the **MULTI\_SERVICE\_SETTINGS** Standard Choice to control the ability to delegate users to work across agencies.

For complete information on how to set up Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

### To enable the sharing of APO information across agencies

1. Navigate to **Civic Platform > Admin Tools > Agency Profile > Standard Choices**.
2. Configure the Standard Choice **APO\_CHECK\_DUPLICATE** as described below:

Type	Select the System Switch option.
Standard Choice Value	Y or N. Set the configuration for Yes if you want to expand search functionality by checking the address against additional fields for duplicate information. Set the value to No to use existing search logic.

3. Configure the Standard Choice **MULTI\_SERVICE\_SETTINGS** as described below:

Type	Select the System Switch option.
Standard Choice Value	IS_SUPER_AGENCY
Value Desc	Yes or No.

## Sharing Contacts

In a multiple-agency environment, you can share contacts across agencies. When a public user adds or updates a contact from the main agency or the sub-agency, Citizen Access can synchronize contact information across all agencies in the multiple-agency environment. The shared contact information includes basic contact information, contact template data, contact addresses, contact aliases, and contact association with public users.

Contact templates relate to contact types. If agencies have associated different contact templates for the same contact type, Citizen Access synchronizes only the template fields with the same field labels between the agencies. For example, Main Agency, Sub-Agency 1, and Sub-Agency 2 have defined the template fields for the contact type “Applicant” as shown in the [Table 21: Example Contact Templates on page 540](#). When Main Agency adds an applicant, the applicant’s information including the template fields is available in both sub-agencies. However, Sub-Agency 2 does not display the applicant’s ethnicity. Similarly, when Sub-Agency 2 adds an applicant, the applicant is available in both Main Agency and Sub-Agency 1 but those two agencies do not have the applicant’s ethnicity information.

**Table 21: Example Contact Templates**

Main Agency	Sub-Agency 1	Sub-Agency 2
Gender	Gender	Gender
Language	Language	Language
Ethnicity	Ethnicity	

The sharing contacts feature requires Standard Choices configuration. Each agency must configure the Standard Choice CONTACT\_ACROSS\_AGENCIES in the same way. For complete information on how to set up a Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

### To enable the sharing of contacts across agencies

1. Navigate to **Civic Platform > Admin Tools > Agency Profile > Standard Choices**.
2. Configure the Standard Choice **CONTACT\_ACROSS\_AGENCIES** for the main agency and each of the sub-agencies as follows:

Type	Select the System Switch option.
Standard Choice Value	Enter the agency codes of the agencies between which you want to share contacts. Super administrator defines the agency codes during agency creation. To find correct agency codes, see "Maintaining Agencies" in the Agencies and Functions chapter of the <i>Civic Platform On-Premise Administrator Supplement</i> .

## Enabling Associated Forms for a Main Agency

The multiple-agency environment supports the associated forms functionality. This allows a public user to complete multiple applications at a time.

When the public user selects multiple services to create applications in the main agency, Citizen Access uses the main agency's placeholder record type as a parent record type to collect common information and Citizen Access uses the selected services' record types as child record types to collect service-specific information. The common information is later copied into each child record. To enable associated forms functionality, follow the instructions in this section.

When the public user selects a single service to create applications in the main agency, the associated forms functionality works in the same way as that in a regular agency. Citizen Access uses the service's record type as a parent record type and requires the user to specify the child record types in the ASI Table section. For complete configuration information about enabling the associated forms functionality in a regular agency, see [Creating a Parent-Child Record on page 527](#).

The Associated Forms step lists all the child record types during application intake process. Depending on the record type settings on the parent record type, the public user can open and complete all or some of the child records before moving forward to the next step. If necessary, the user can remove any of the child records from the Associated Forms list.

### To enable the associated forms functionality for a main agency

1. Make sure you associate each of the parent record types and child record types to a page flow. For complete configuration information, see [Chapter 9: Page Flow Configuration on page 132](#).

2. Make sure you mark the **Enable Associated Forms** option for the parent record type in the record type setting in Civic Platform. See [Configuring Record Type Settings on page 288](#).

**Settings for Accela Citizen Access**

**Instructions :** The settings below enable this record type to be selected and/or renewable in Accela Citizen Access. Mark the Enable Issuance check box to automatically issue or renew the permit or license when the application is submitted in Accela Citizen Access.

Would you like this permit to be available through Accela Citizen Access?  Yes  No

Page Flow Code : **Commercial Business**

Document Code : **BUILDING DOCUMENTS**

Set the criteria for selecting fees between the Contractor Value and the Valuation Calculator:

- Use higher value  Use lower value
- Enable Renewal
- Enable Issuance

Renewal Record Type\*: **Building/Commercial/Combo/N**

- Enable Associated Forms
- Enable Partial Submission
- Searchable in Accela Citizen Access

*Citizen Access adds the Associated Forms step to the parent application creation process to display the child records.*

**General Information** **Home** **Building** **Licenses** **Service Request** **Airport**

Create an Application by Selecting Services | Apply | Obtain a Fee Estimate | Search | Schedule Inspections

**Medical Waste Management Plan**

1 2 Step 2 3 Review 4 **Associated Forms** 5 Pay Fees 6 Record Issuance

**Step 4 : Associated Forms**

**Hazardous Materials**

Listed below are the items added to this record. You must fill out an associated form for each item before this record can be submitted.

Added Items:

Blood or body fluids	<a href="#">View</a>	<a href="#">Remove</a>
Laboratory wastes	<a href="#">View</a>	<a href="#">Remove</a>
Laboratory wastes	<a href="#">Open</a>	<a href="#">Remove</a>
Sharps	<a href="#">Open</a>	<a href="#">Remove</a>

[Continue to Payment >](#) [Save and resume later:](#)

3. If necessary, mark or clear the **Enable Partial Submission** option for the parent record type in the record type setting. This option is nested under the **Enable Associated Forms** option.

*If you mark the Enable Partial Submission option, Citizen Access allows public users to move forward to the next step without completing creation of all child records. For example, the Continue to Payment button in the screenshot for step 2 becomes accessible.*

*If you clear the Enable Partial Submission option, Citizen Access requires public users to open and complete each child record before moving forward to the next step.*

## Delegate User Administrator

Civic Platform allows users to perform operations in multiple agencies using one user account. A user granted access to multiple agencies can log in to Civic Platform and easily switch between agencies to perform tasks or view information. This feature is implemented in ACA for creating records for multiple agencies. This provides a way for a public user to have access to search information and view information shared across agencies. Public users can also request services from multiple agencies with one public user account. For instructions on how to create a delegate user specific to the public user group for ACA creating records, see [Creating a Delegate Account for a Public User Group on page 549](#).

Any external user granted access to information at a sub-agency is controlled by the sub-agency administrator in two ways: one way is Agency FID configuration, the other way is user account permissions assigned to the delegate user.

To create a delegate user account, an agency must define, grant permissions, and enable access to an external agency user. This is done by creating a regular agency user account that is specifically designated for the user outside of your agency. Your agency creates a user account, grants permissions, then establishes a relationship between your agency User ID to the User ID from the external agency using the delegate user administrator. If your agency User ID and external agency User ID does not create the delegate user relationship between each other, the delegate, or external agency user, has no access to your agency database. It also requires your agency and the external agency to share information in a common database. This is used when you search and select the delegate User ID from the external agency to establish the link between your agency and the external agency. To review how your agency and the external agency can share information, see [Sharing Information between Agencies on page 539](#).

For example, the State of Oregon may have associations with Marion County, the city of Portland, and the city of Sandy. Oregon is the parent agency. Marion County, Portland, and Sandy are sub-agencies. Betty Greenwood, a user at Oregon, needs access to Marion County and Portland, but not to Sandy. Marion County and Portland each create a regular user account and grant user access at their discretion. After Marion County and Portland create the user account, they designate this user account for the delegate user, Betty Greenwood from Oregon. Oregon must share Betty's User ID with both Marion County and Portland. The administrators link her User ID with the designated user account in the delegate user portlets. When Marion County and Portland establish this relationship, Betty can switch between the different agency locations. She has access to Oregon, Marion County, and Portland after logging into Civic Platform, but does not have access to Sandy. Marion County and Portland can change Betty's access at any time. The delegate user history portlet displays any changes to Betty's delegate user account.

Civic Platform and Citizen Access support this feature. It requires Standard Choices configuration for setup. The parent and sub-agencies must also share information in a database for complete functionality. Refer to [Sharing Information between Agencies on page 539](#). If your agency uses ACA, please refer to [Creating a Delegate Account for a Public User Group on page 549](#). This section provides details on how to set up the Public User group as a delegate user for ACA.

For information about how to configure a regular user account, refer to the "Adding a User" section in the "User Profile" chapter in the *Accela Civic Platform Administrator Guide*.

## Topics

- Configuring Delegate User Administrator
- Creating a Delegate User
- Creating a Delegate Account for a Public User Group
- Enabling Delegate User Agency Access
- Searching and Editing Delegate User Information
- Viewing Delegate User History
- Toggling between Agency Locations

## Configuring Delegate User Administrator

Expose the delegate user portlets and enable the ability for delegate users to switch between the main parent agency and sub-agencies through Functional Identification (FID) configuration. This section provides FID configuration details for Civic Platform. An important configuration consideration is that administrators must set up these FID configurations for each agency. It is possible that the settings for the FIDs associated with delegate user administrator may differ from agency to agency. Please pay special attention to the access specifications and the effects on a delegate user in [Table 22: FID 0286 Delegate User Management on page 545](#) and [Table 23: FID 8403 Multi-Agency Switch on page 547](#). For example, Sandy may have FID 0286 set to Read-Only and Oregon may have 0286 set to Full-Access which provides delegate users full access to information at Oregon, but restrict them to only viewing information in Sandy.

### To configure the delegate user administrator

1. Navigate to **Civic Platform > User Profile > Groups**.  
*Civic Platform displays the User Group-Search page.*
2. Search and Select the User Group to which you want to apply the delegate user feature.
3. Configure the Functional Identification (FID) number **0286 Delegate User Management** and **FID 8403 Multi-Agency Switch**. For information on configuring the FIDs, refer to the *Accela Civic Platform Configuration Reference*.

- a. FID **0286 Delegate User Management** is used to control the access of Delegate User Administrator portlets.

<b>Full-Access</b>	When this FID is set to Full-Access, user can create/update/view/delete/search delegate user relationships in the Delegate User portlet. User can also search/view Delegate User relationship history in the Delegate User History portlet.
<b>Read-Only</b>	When this FID is set to Read-Only, User can view/search Delegate User relationships in the Delegate User portlet and Delegate User History. User cannot create/update/delete Delegate User relationships.
<b>No-Access</b>	When this FID is set to No-Access, user has no privilege to access the Delegate User Portlet.

**Table 22: FID 0286 Delegate User Management**

FID Setting	Parent Agency Administrator	Delegate User Administrator from Parent Agency	Sub-Agency Administrator
Full Access set at both the Parent and Sub-agencies	User has full-access. Users can create, update, view, delete, and search delegate user relationships in the Delegate User portlet. Users can also search and view Delegate User relationship history in the Delegate User History portlet.	User has full-access at both agencies. Users can create, update, view, delete, and search delegate user relationships in the Delegate User portlet. Users can also search and view Delegate User relationship history in the Delegate User History portlet.	User has full-access. Users can create, update, view, delete, and search delegate user relationships in the Delegate User portlet. Users can also search and view Delegate User relationship history in the Delegate User History portlet.
Full Access set at Parent Agency and Read Only set at Sub-agency.	User has full-access. They can create, update, view, delete, and search delegate user relationships in the Delegate User portlet. They can also search and view Delegate User relationship history in the Delegate User History portlet.	User has full access permissions at the Parent Agency and Read-only permissions at the Sub-agency.	Read Only Permissions: User can view and search Delegate User relationships in the Delegate User portlet and Delegate User History. They cannot create, update, or delete Delegate User relationships.

Table 22: FID 0286 Delegate User Management (Continued)

FID Setting	Parent Agency Administrator	Delegate User Administrator from Parent Agency	Sub-Agency Administrator
Full Access set at Parent Agency and No Access set at the Sub-agency.	User has full-access. They can create, update, view, delete, and search delegate user relationships in the Delegate User portlet. They can also search and view Delegate User relationship history in the Delegate User History portlet.	Full Access at parent agency. No access at Sub-agency.	No Access.
Read Only set at Parent Agency. Full Access to Sub-agency.	Read Only Permissions: User can view and search Delegate User relationships in the Delegate User portlet and Delegate User History. They cannot create, update, or delete Delegate User relationships.	Read Only permissions at Parent Agency. Full Access Sub-agency	User has full-access. They can create, update, view, delete, and search delegate user relationships in the Delegate User portlet. They can also search and view Delegate User relationship history in the Delegate User History portlet.
No Access at Parent Agency. Read Only Access at Sub-agency.	No Access.	No Access at Parent Agency. Read Only Access at Sub-agency.	Read Only Permissions: User can view and search Delegate User relationships in the Delegate User portlet and Delegate User History. They cannot create, update, or delete Delegate User relationships.

- b. FID 8403 Multi-Agency Switch is used to control the privilege of toggling between multiple Agencies. The functionality differs a little between Civic Platform and Civic Platform. The descriptions below provide these differences:

**Note:** *Civic Platform can enable the ability to toggle between agencies by two different FIDs. The Multi-Agency switch controlled by FID 8403 offers more functionality and overrides FID 8098 when administrators have both set to Full-Access.*

- **Civic Platform Agency Switch Functionality:**

Full-Access: When FID 8403 is set to Full-Access and the user is defined as a Delegate User, an agency drop-down list displays in Civic Platform. The user can

toggle between agencies by selecting an agency from this drop-down list. For a graphical representation of this list, refer to [Toggling between Agency Locations on page 552](#). The agency drop-down list only displays to users that have a delegate user account.

When FID 8403 is set to Read-Only and No-Access: Users do not have privileges to switch between agencies. The Agency drop-down list does not display to users even if they are defined as a Delegate User.

**- Civic Platform Classic Administration Agency Switch Functionality:**

Full-Access: A Delegate User views an agency drop-down list in the upper area of Civic Platform. The user toggles between agencies by selecting an agency from the drop-down list. See [Toggling between Agency Locations on page 552](#). If the user is not defined as a Delegate User, the older existing FID 8098 Agency Switch business logic is implemented.

Read-Only and No-Access: The new Multi-Agency Switch is not available. The user can only use the older existing switch logic using FID 8098 Agency Switch if it is enabled.

**Table 23: FID 8403 Multi-Agency Switch**

FID Setting	Regular Parent Agency User	Delegate User from Parent Agency	Regular Sub-agency User
Full Access set at both the Parent and Sub-agencies	The user does not view the new Agency Switch drop-down list. They must be assigned to a delegate user account at another agency.	The new “Agency Switch” drop-down list is available at the top of the parent agency page. User toggles between agencies to which they have access. They can perform regular user functions based on the delegate user permissions on the User ID at the sub-agency.	Not Applicable. No Parent Agency Access.
Full Access set at Parent Agency and Read Only set at the Sub-agency	The user does not view the new Agency Switch drop-down list. They must be assigned to a delegate user account at another agency.	The new “Agency Switch” drop-down list is available at the top of the parent agency page. User toggles between agencies to which they have access. They can only view information to which they have permissions set on the delegate User ID at the sub-agency.	Not Applicable. No Parent Agency Access.

**Table 23: FID 8403 Multi-Agency Switch (Continued)**

FID Setting	Regular Parent Agency User	Delegate User from Parent Agency	Regular Sub-agency User
Full Access set at Parent Agency and No Access set at the Sub-agency	The user does not view the new Agency Switch drop-down list. They must be assigned to a delegate user account at another agency.	The new “Agency Switch” drop-down list is available at the top of the parent agency page. The drop-down list populates the agencies to which they have access. They do not have access to this sub-agency. Civic Platform eliminates the sub-agency from the list of available agencies in the drop-down list.	Not Applicable. No Parent Agency Access.
Read Only or No-Access set at Parent Agency	Not Applicable	The new “Agency Switch” functionality is not available.	Not Applicable. No Parent Agency Access.

## Creating a Delegate User

A delegate user is a regular agency user account that is specifically designated for a user located outside of your agency. You create a delegate user to assist with the management of multi-agency information. Creating a delegate user account requires two main steps. First, you must create a user account for the external agency user at your agency. Then you must link that user account with the User ID from the external agency to create the delegate user account in the Delegate User portlets.

When the delegate user account is established, the external user has access to both the main agency and sub-agency. The delegate user account can only relate to one external agency user.

If your agency implements Citizen Access, you must create a delegate user account with the public user group. This allows public users to access information and/or request services from multiple agencies after logging in. Please refer to [Creating a Delegate Account for a Public User Group on page 549](#) for detailed configuration steps.

This feature requires Functional Identification (FID) setup. Refer to [Configuring Delegate User Administrator on page 544](#) for configuration details.

### To create a new delegate user

1. Create a user account and grant permissions at your agency designated for an external agency user.
  - a. Navigate to **Civic Platform > Admin Tools > User Profile > User**.
  - b. Click the **Add** button and complete the user fields. Refer to “Adding a User” in the “User Profile” chapter in the *Accela Civic Platform Administrator Guide*.
  - c. In the User Group/Privilege section, mark the check box next to each module that you want the user to be able to access.
  - d. Assign which user group the external user belongs to for each module.
  - e. Click the **Save** button.

2. Define the Delegate user account. This account links the agency account with the external agency user account.
  - a. Navigate to **Admin > Setup portlet > System Tools > Delegate User**  
*Civic Platform displays the Delegate User portlets.*
  - b. Click the **New** button.  
*Civic Platform displays the New Delegate User portlet.*
  - c. Complete the fields as described in [Table 24: Delegate User Fields on page 549](#).
  - d. Click the **Save** button.

**Table 24: Delegate User Fields**

Field	Description
Allow Delegate User Login	Mark the option to allow the delegate user to log in to your agency.
Delegate User ID	This is the delegate user's User ID created at your agency. Click the picker icon to search and select the User ID. Refer to <a href="#">step 1</a> in the "Creating a Delegate User" section.
Parent Agency	Use the drop-down list to select the delegate user's primary agency location.
Parent User ID	Enter the delegate user's User ID at his primary agency. Click the picker icon to search and select this information.
Status	Use the drop-down list to select the user's status. Select Enable to activate or Disable to deactivate the delegate user account.

## Creating a Delegate Account for a Public User Group

A public user can view multi-agency information, or view request services from various agencies from one user login. This is done by creating a public user delegate user account. This process requires you to setup a regular user account at the agency level. You do not need to set permissions as they do not apply in ACA. After the regular user account is created, you link the user account with a public user group at an agency using the delegate user portlets.

This feature requires Standard Choices configuration for implementation, refer to [Configuring Delegate User Administrator on page 544](#).

### To create a public user delegate user account

1. Create a user account at your agency designated for the public user group. You do not need to assign permissions.
  - a. Navigate to **Civic Platform > Admin Tools > User Profile > User**.
  - b. Click the **Add** button and complete the user fields. Refer to the "Adding a User" section in the "User Profile" chapter of the *Accela Civic Platform Administrator Guide*. You do not need to assign this user any permissions.
  - c. Click the **Save** button.

2. Define the Delegate user account. This account links the agency user account with the public user group.

- a. Navigate to **Admin > Setup portlet > System Tools > Delegate User**

*Civic Platform displays the Delegate User portlets.*

- b. Click the **New** button.

*Civic Platform displays the New Delegate User portlet.*

The screenshot shows a web-based application interface for managing delegate users. At the top, there's a toolbar with icons for Menu, Search, New, Delete, and Help. Below the toolbar is a navigation bar with links for Delegate Agency, Delegate User ID, Parent Agency, Parent User ID, Allow Delegate User Login, and Status. The main area contains a table listing four existing delegate users:

Delegate Agency	Delegate User ID	Parent Agency	Parent User ID	Allow Delegate User Login	Status
SPRINGFIELD_CIT	ADMIN	OREGON	ADMIN	Yes	Enabled
MARION COUNTY	DELEGATE	OREGON	AMBER	No	Enabled
SPRINGFIELD_CIT	PEGGY	OREGON	PUBLICUSER	Yes	Enabled
MARION COUNTY	PEGGY	OREGON	PUBLICUSER	Yes	Enabled

Below the table is a 'New Delegate User' form with fields for Delegate User ID (a picker), Parent Agency (a dropdown menu), Parent User ID (a picker), Allow Delegate User Login (a radio button group with 'Yes' selected), and Status (a dropdown menu set to 'Enabled').

- c. Complete the Delegate User fields as described below:

**Allow Delegate User Login** Mark the check box to allow public user access to multi-agency information.

**Delegate User ID** Use the picker icon to select the agency user account created for the public user group. Refer to [step 1](#) in the [Viewing Delegate User History](#) section.

**Parent Agency** Use the drop-down list to select the agency to which you want public users to have the multi-agency access.

**Parent User ID** Click the picker icon to search and select PUBLICUSER.

**Status** Use the drop-down list to select the delegate user status. Select Enable to activate or Disable to deactivate the delegate user account.

- d. Click the **Save** button.

## Enabling Delegate User Agency Access

Your agency can allow a delegate user from another agency to access your data in Civic Platform for viewing or performing tasks. The delegate user can perform tasks or view information in your agency only when the delegate user relationship is established. Enable or disable delegate user access to your agency at any time. For information on how to setup a new delegate user, see [Creating a Delegate User on page 548](#).

### To enable a delegate user

1. Navigate to **Admin > Setup Portlet > System Tools > Delegate User**.

*Civic Platform displays the Delegate User portlets.*

2. Search and select a delegate user. If the delegate user account is not established, refer to [Creating a Delegate User on page 548](#).  
*Civic Platform displays the Delegate User detail portlet.*
3. Mark the option to allow the delegate user access to your system at login.
4. Click the **Save** button.

## Searching and Editing Delegate User Information

You can search for and edit delegate user information at any time. You may want to do this to inactivate a delegate user. Any changes to delegate user information are stored and accessible for viewing in the Delegate User History portlet. Refer to [Viewing Delegate User History on page 552](#).

If you want to change permissions for the delegate user, you must make those changes to the user account profile you established at your agency for the external user. For example, you may want to change a user's access from full access to view only. This limits a delegate user from making changes. See [Creating a Delegate User on page 548](#) or refer to the "Editing a User" section in the "User Profile" chapter in the *Accela Civic Platform Administrator Guide*.

### To search and edit delegate user information

1. Navigate to **Admin > Setup portlet > System Tools > Delegate User**.

*Civic Platform displays the Delegate User portlets.*

2. Click the **Search** button.

*Civic Platform displays the delegate user search portlet.*

3. Enter search criteria in one or more of the delegate user fields, then click **Submit**. Refer to [Table 24: Delegate User Fields on page 549](#).

*Civic Platform returns a list of delegate users that meet the search criteria.*

4. Select the delegate user to which you want to modify information.

*Civic Platform displays the delegate user detail in the Delegate User detail portlet.*

5. Make modifications. Refer to [Table 24: Delegate User Fields on page 549](#) for details regarding each delegate user field.

6. Click **Submit**.

## Viewing Delegate User History

The delegate user history portlet provides a running history of the delegate user account. It indicates an operation name and corresponding date. For example, it shows the date when the delegate user account was created or when an account was deactivated and then reinstated. This portlet does not display changes to user permissions nor changes to tasks the delegate user performed. Search and select historical information using the delegate user search feature.

### To view delegate user history

1. Navigate to **Admin > Setup portlet > System Tools > Delegate User**.

*Civic Platform displays the Delegate User list portlet.*

2. Select the delegate user to which you want to view history. If the delegate user does not exist anymore, click the **Search History** button and enter your search criteria.

*Civic Platform displays the delegate user details in the delegate user secondary detail portlet.*

3. If the delegate user exists, click the **Delegate User History** tab to view history.

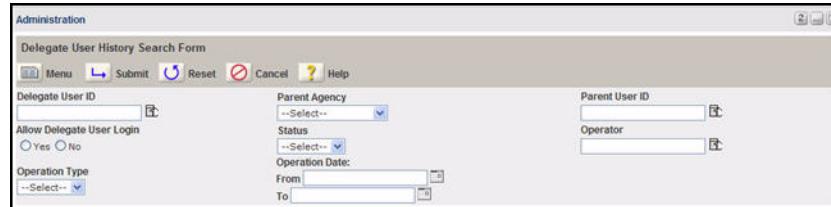
*Civic Platform displays a list of delegate user history to view.*



4. Select the historical event you want to view. If necessary you may search for a specific event.

- a. Click the **Search** button.

*Civic Platform displays the Delegate User History Search portlet.*



- b. Enter your search criteria. Refer to [Table 24: Delegate User Fields on page 549](#).

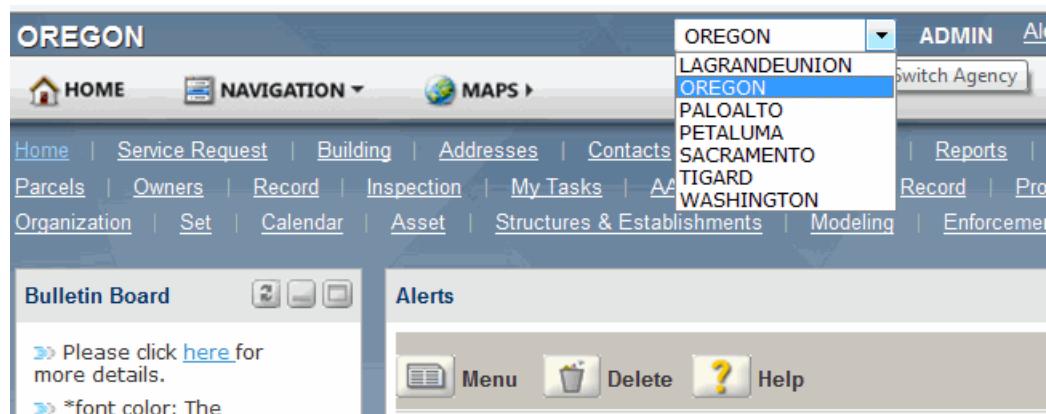
*Civic Platform returns a list of applicable results.*

## Toggling between Agency Locations

Civic Platform provides a way for a multi-agency user to switch from one agency to another. After a user logs into their primary agency, Civic Platform displays a drop-down list in the upper areas of the page. This list is populated with the sub-agencies to which they are granted delegate user access.

### To switch between agency locations

- Do one of the following:
  - To switch between agencies in Civic Platform, use the drop-down list in the upper area of your page.



- To switch between agencies in Civic Platform, use the drop-down list in the upper area of your page.

The screenshot shows the Oregon Civic Platform Admin Tools page. At the top right, there is a dropdown menu labeled "switch Agency" with a list of agency names: OREGON, LAGRANDEUNION, OREGON, PALOALTO, PETALUMA, SACRAMENTO, TIGARD, and WASHINGTON. The "OREGON" option is selected. The main navigation bar includes links for Menu, Favorites, Help, Logout, User ID: ADMIN, Admin Tools, People, Fees, Cashier, Workflow, and Attachment. Below the navigation bar is a section titled "Administrator Tools" containing links for Agency Profile, Standard Choices, Standard Comments, Oracle Report, Security Policy, Setup Text, Content Customize, Sequence Generator, Product License, and a link to the "Hearing" section. The "Admin Tools" link is highlighted in blue.

## Multiple Agency Service Management

Civic Platform provides the ability to manage services that multiple agencies offer by for public users. A public user can request services for records offered from multiple agency locations using one ACA login. For example, the public user can request a water pipe repair with Maricopa County and a sewer repair with Portland city after logging into ACA. The one login provides access to all services to which they have permissions.

Manage the services offered by associating it with a record type. You can also associate the service with a licensed professional type. For example, a licensed commercial contractor may have access to request plumbing or water service repairs. You can also associate an address type with a service. For example, 123 Main Street is a commercial building and has access to roof repair, water, and plumbing services offered by the State, county, and city. For more

examples of service configurations, refer to [Table 25: Services Example Configurations on page 556](#).

Use the Service Lock Condition feature to filter the offered services. This provides the option to exclude services to a particular address or licensed professional.

Administrators for the super agency can use the Service Group feature on the Cross-Agency Settings page to group services across agencies or within an agency, and sort service groups and services.

In order for complete feature functionality, you must consider these configurations. The multi-agency services feature applies to ACA; therefore the public user group must have an associated delegate user account to allow users to view the services offered from multiple agencies. See [Creating a Delegate Account for a Public User Group on page 549](#). If you want to provide public users the ability to request services from multiple agencies, you must configure Civic Platform to create records that accommodate multi-agency functionality. This requires matching service configuration as ASI subgroups at the parent and sub-agency level. Refer to [Configuring Application Specific Information on page 304](#). You must configure all agencies providing services to share information. Refer to [Sharing Information between Agencies on page 539](#).

## Topics

- [Configuring Multiple Agency Services](#)
- [Adding a New Service](#)
- [Searching and Editing a Service](#)
- [Associating License Types with a Service](#)
- [Associating an Address Type with a Service](#)
- [Incorporating the Service Lock Condition](#)
- [Synchronizing Licensed Professional Data between Agencies](#)
- [Grouping Services for Super Agency](#)
- [Cross-agency service group descriptions](#)

## Configuring Multiple Agency Services

In order for your agency to use the multiple agency services management feature, you must configure the related Functional Identification number, Standard Choices, and EMSE script.

Set Functional Identification (FID) number 0292 Admin-Service to enable the multi-agency services management functionality.

Configure the Standard Choices Values for the MULTI\_SERVICE\_SETTINGS Standard Choice to define the main agency, the service lock condition filter, and to indicate which services are attached to each agency.

For information on configuring the FIDs and Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

### To configure the ability to manage services offered by multiple agencies

1. Enable FID 0292 Admin-Service to turn on the Multi-Services feature.

2. Navigate to **Civic Platform > Agency Profile > Standard Choices**.

*Civic Platform displays the Standard Choices-Search page.*

3. Configure the MULTI\_SERVICE\_SETTINGS Standard Choice. This Standard Choice is used to define multi-agency functionality. The multi-agency services feature requires the configuration of three Standard Choices Values.

**ALLOW\_SERVICE\_LOCK\_SEVERITY** Value Desc. Yes or No. Yes enables the ability to lock services by condition.

**IS\_SUPER\_AGENCY** Value Desc. Yes or No. The main agency, also known as super agency, must set this item to Yes, sub-agencies should set it to No. ACA system uses this value to determine if the current agency is a super agency.

**AGENCY\_LOGO\_TYPE** Value Desc. LOGO\_TYPE\_CATEGORY. This logo type is used in ACA to indicate which agency and associated agency logo that the service is attached to. This standard choice must match the Standard Choices Value in the LOGO\_TYPE\_CATEGORY Standard Choice. Refer to [Associating a Logo with an Agency on page 566](#).

4. Set agency priority definitions in the Agency Priority EMSE script. This script determines which agency has priority over other agencies should multiple agencies offer the same service.

## Adding a New Service

This feature is useful for offering services from multiple agencies to your public users through ACA. You can add any service offered by your agency or a service from an agency to which you share information. See [Sharing Information between Agencies on page 539](#). Each service relates to a record type and a licensed professional or address type. For example, see [Table 25: Services Example Configurations on page 556](#). These configurations determine which services users can view in ACA. A pre-configured EMSE (Event Manager and Script Engine) script determines which agency is used in case multiple agencies offer the same service.

The public user group or agency user must have a delegate user account to view services. Refer to [Delegate User Administrator on page 543](#) for configuration information.

To learn more about associating a licensed professional type or address type, see [Associating License Types with a Service on page 558](#) and [Associating an Address Type with a Service on page 559](#).

### To add a new service

1. Navigate to **Admin > Setup portlet > Agency Profile > Service**.

*Civic Platform displays the Service administration list portlet.*

2. Click the **New** button.

*Civic Platform displays the New Service portlet.*

3. Complete the fields as described in [List 12: Service Field Descriptions on page 556](#).
4. Click the **Save** button.
5. Associate a Licensed professional as described in [Associating License Types with a Service on page 558](#).
6. Associate an address type as described in [Associating an Address Type with a Service on page 559](#).
7. Click the **Save** button.

#### List 12: Service Field Descriptions

<b>ASI Group</b>	This field is read-only. This field is automatically populated based on the selected Record Type.
<b>ASI Sub Group</b>	Use the drop-down list to select the ASI sub group, or leave it empty. The ASI sub group sets the scope of the service to a specific portion of the record type. If the ASI sub group is not specified, the service scope is identical with that of the record type.
<b>Record Type</b>	Click the picker icon to select the record type you want to associate with this service.
<b>Service</b>	Enter the name of the service.

Table 25: Services Example Configurations

Agency	Service Name	Record Type	ASI Group	ASI Sub Group	Associated Licensed Professional	Associated Address Type Group
Oregon	Water Heating	Plumbing	Plumbing_services	WaterHeater_Info	Contractor	Address Type Group 1
Oregon	New Drain	Plumbing	Plumbing_services	NewDrain_Info	Architect	Address Type Group 1 and Address Type Group 2

Table 25: Services Example Configurations (Continued)

Agency	Service Name	Record Type	ASI Group	ASI Sub Group	Associated Licensed Professional	Associated Address Type Group
Eugene	Re-roof	Structural	Structural_services	Re-roof_info	Contractor	Address Type Group 1
Portland	Fishing	Fishing	Fishing_services	Fishing_info		Address Type Group 2

## Searching and Editing a Service

Search for an existing service and make any updates as needed. For example, you might change the record types associated with the service.

### To search and edit a service

1. Navigate to **Admin > Setup portlet > Agency Profile > Service**.

*Civic Platform displays the Service administration list portlet.*

2. Click the **Search** button.

*Civic Platform displays the Service Search portlet.*

The screenshot shows the 'Administration' header and the 'Service' search interface. It includes fields for 'Service' (with a dropdown menu), 'Record Type' (with a dropdown menu), 'License Type' (with a dropdown menu set to '-Select-'), and 'Address Type' (with a dropdown menu set to '-Select-'). Below these are 'Submit', 'Reset', 'Cancel', and 'Help' buttons.

3. Enter your search criteria.

*Civic Platform displays a list of services that meet your criteria.*

4. Select the service you want to work with.

The screenshot shows the 'Administration' header and the 'Service' list interface. It lists services like 'Building Permit' with their details: Record Type 'Building/ACA/ACA/all section in one page', ASI Group 'BOND', and ASI Subgroup 'BOND'. Below this is a 'Service: Building Permit' detail view with buttons for 'Menu', 'Save', 'Reset', and 'Help'. At the bottom are tabs for 'Service', 'License Type (0)', and 'Address Type (0)'. A separate panel shows the selected service's details: 'Service' 'Building Permit', 'ASI Group' 'BOND', and 'Record Type' 'Building/ACA/ACA/all section in one page' with a dropdown menu set to '-Select-'.

5. Make your modifications. Refer to [List 12: Service Field Descriptions on page 556](#).
6. Click the **Save** button.

## Associating License Types with a Service

You can associate a license type with a service. This provides a way for a user to view or to request services that apply with their license type after logging in. For examples, refer to [Table 26: Example Multiple Agency Services and License Type Associations on page 559](#).

**Note:** *There may be users or services that do not relate to any license type. Users who do not relate to any license can only view the services that do not relate to any license types.*

You can use this feature with EMSE scripts for license validation. When a customer updates licensed professional information in Civic Platform, an external database can verify the license by using a dynamic web service. This also applies to a licensed professional registered with a public user account for ACA. Validation of license information can occur at the time of login. For information about license validation, refer to [License Verification Page Configuration on page 129](#).

### To associate a license type with a service

1. Navigate to **Admin > Setup portlet > Agency Profile > Service**.  
*Civic Platform displays the Service Administration list portlet.*
2. Search and select the service you want to work with.  
*Civic Platform displays the service details in the secondary detail portlet.*
3. Click the **License Type** tab.  
*Civic Platform displays the License Type list portlet.*

The screenshot shows two stacked portlets. The top portlet is titled 'Service' and contains a table of service details. The bottom portlet is titled 'License Type' and contains a list of license types.

Service	CAP Type	ASI Group	ASI Sub Group
Garbage disposal	Building/QuickPermits/Plumbing/Garbage disposal	PLUMBING	GARBAGE DISPOSAL
Clothes washer	Building/QuickPermits/Plumbing/Clothes washer	PLUMBING	CLOTHES WASHER
Drinking fountain	Building/QuickPermits/Plumbing/Drinking fountain	PLUMBING	DRINKING FOUNTAIN
Range hood	Building/QuickPermits/Mechanical/Range hood	MECHANICAL	RANGE HOOD

**License Type**

License Type
DEVELOPER
PLUMBING

- Click the **Look Up** button.

*Civic Platform displays the License Type portlet.*

- Enter the Licensed Type Name and Description.

- Click the **Submit** button.

*Civic Platform returns you to the License Type list portlet.*

- Mark the check box next to the license type you want associated with the service.
- Click the **Select** button.

**Table 26: Example Multiple Agency Services and License Type Associations**

Agency	Service Name	License Type
Oregon	Water Heating	Contractor
Oregon	Water Heating	Architect
Eugene	New Drain	Contractor
Eugene	New Drain	Architect
Portland	Re-roof	Contractor
Portland	Re-roof	Architect

## Associating an Address Type with a Service

You can associate an address type with a service. This provides a way for a user to view or to request services that apply to their address after logging in. For examples, refer to [Table 27: Example Services and Address Type Associations on page 560](#).

### To associate an address type with a service

- Navigate to **Admin > Setup portlet > Agency Profile > Service**

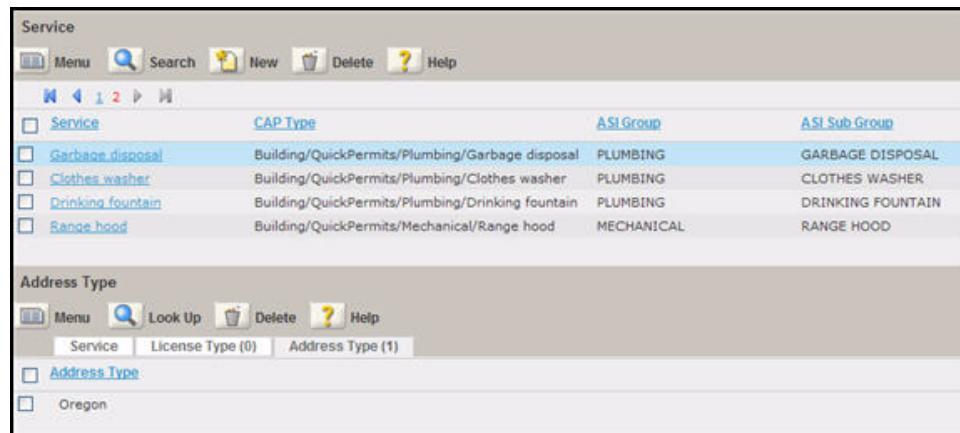
*Civic Platform displays the Service Administration list portlet.*

- Search and select the service you want to work with.

*Civic Platform displays the service details in the secondary detail portlet.*

3. Click the **Address Type** tab.

*Civic Platform displays the Address Type list portlet.*



4. Click the **Look Up** button.

*Civic Platform displays the Address Type list portlet.*

5. Enter the Address Type Name and Description you want associated with the service.

6. Click the **Submit** button.

*Civic Platform returns you to the Address Type list portlet.*

7. Mark the check box next to the address type you want associated with the service.

8. Click the **Select** button.

**Table 27: Example Services and Address Type Associations**

Agency	Service Name	Address Type Group
Eugene	Water Heating	Eugene
Eugene	New Drain	Oregon
Portland	Re-roof	Oregon

## Incorporating the Service Lock Condition

You can choose to limit one or more services to a particular licensed professional or address. The Service Lock Condition feature is particularly useful if you want an address or licensed professional locked out of services that a particular agency offers, but may still offer services from other agencies.

When the Standard Choices Value ALLOW\_SERVICE\_LOCK\_SEVERITY is enabled for the Standard Choice MULTI\_SERVICE\_SETTINGS, Civic Platform provides a Service Lock option in the Severity drop-down list in the conditions portlets for licensed professionals and addresses. Select the Service from the Condition Name drop-down list to lock out that service from the licensed professional or address. If you only want to lock out one service, create a

Lock condition and associate it with a service name. Create as many conditions to limit the available services for the licensed Professional or address.

## Topics

- [Adding a Service Lock Condition to a Licensed Professional](#)
- [Adding a Service Lock Condition to an Address](#)

### ***Adding a Service Lock Condition to a Licensed Professional***

Your agency can filter available services for a licensed professional using the Conditions portlet. Provide a service lock on all services for the licensed professional or create a condition to lock out one particular service.

#### **To add a service lock to a licensed professional**

1. Navigate to **Licensed Professional**.  
*Civic Platform displays the Licensed Professional list portlet.*
2. Select the licensed professional to which you want to associate a service lock condition.  
*Civic Platform displays the Licensed Professional details in the secondary detail portlet.*
3. Click the **Conditions** tab.  
*Civic Platform displays the Licensed Professional Conditions portlet.*
4. Go to the **Severity** field and select Service Lock from the drop-down list.
5. Go to the **Condition Name** field and select the service to which you want to associate the service lock from the drop-down list.
6. Click the **Submit** button.

### ***Adding a Service Lock Condition to an Address***

Your agency can filter available services for an address using the Conditions portlet. Provide a service lock on all services for the address or create a condition to lock out one particular service.

#### **To add a service lock condition to an address**

1. Navigate to **Address**.  
*Civic Platform displays the Address list portlet.*
2. Search and select the address to which you want to associate a service lock condition.  
*Civic Platform displays the address details in the secondary detail portlet.*
3. Click the **Conditions** secondary tab.  
*Civic Platform displays the Address Conditions portlet.*
4. Go to the **Severity** field and select Service Lock from the drop-down list.

5. Go to the **Condition Name** field and select the service to which you want to associate the service lock from the drop-down list.
6. Click the **Submit** button.

## Synchronizing Licensed Professional Data between Agencies

Maintain the accuracy of licensed professional information by running a regularly scheduled batch job to synchronize licensed professional data from parent agency to sub-agency. The administrator from the parent agency is responsible for setting up the batch job for data synchronization. When the batch job runs and Civic Platform recognizes that the sub-agency does not have the licensed professional in the database, the licensed professional is created at the sub-agency with same license state, state license number, license type as the one at the parent agency.

For detailed information about batch jobs, refer to “Running a Batch Job” in “Batch Processing” chapter in the *Accela Civic Platform Administrator Guide*.

### To synchronize licensed professional data between agencies

1. Navigate to **Admin > System Tools > Batch Engine**.

*Civic Platform displays the Batch Engine portlet.*

2. Click the **New** button.

3. Complete the Job detail fields as described below.

**Job Name**      Provide a name for the new job.

**Job Type**      Choose **System** from the drop-down list.

**Service Category**      Select **License Sync** from the drop-down list.

4. Click the **Save** button.

5. Schedule the Job.

- a. Click the **Job Schedule** tab.

*Civic Platform displays the Job Schedule portlet.*

- b. Complete the fields as described below:

- c. Click the **Save** button.

**Schedule Status**      Select **Active** from the drop-down list.

**Frequency**      Select Daily from the drop-down list.

**Start Time**      Enter the time that you want the job to execute. This time should be a time at which the server is free.

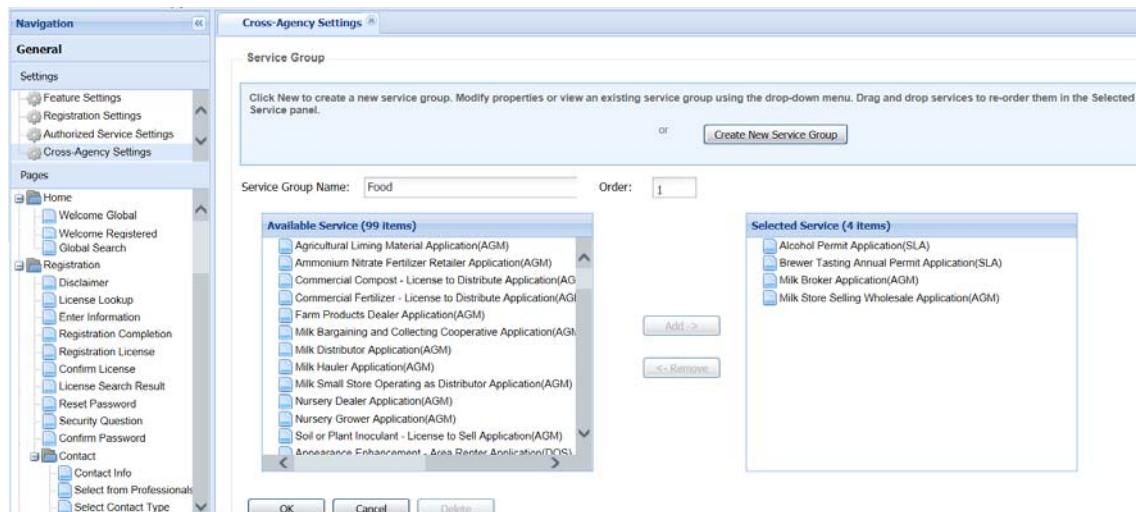
## Grouping Services for Super Agency

Multiple agencies can provide various services, but only administrators of the super agency can set up service groups (see the [Figure 127:Service Group Setup on Cross-Agency Settings Page in ACA Admin](#)) on the Cross-Agency Settings page to group related services within an agency or across agencies. For example, administrators can group “Food Service Establishment” from agency A and “Mobile Food Vendor” from agency B into a new “Food” service group. Or an administrator can group “Barber Shop” from agency A with “Business License,” also from agency A, into a new Health and Safety service group.

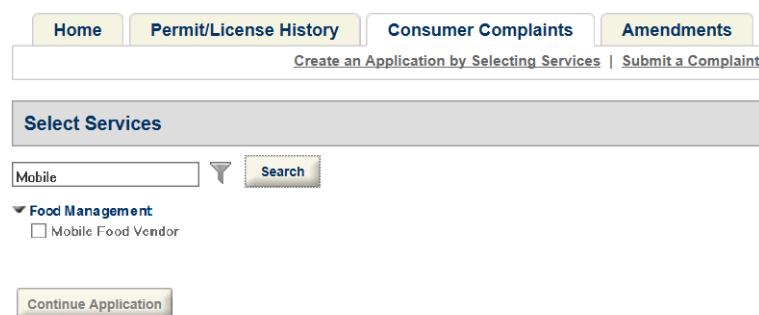
One service can be included in multiple service groups. If administrators do not define some services into any specific service group, Citizen Access classifies these undefined services into a service group called Other, which displays at the bottom of the list of service groups.

When public users access the Select Services page in Citizen Access for the super agency, a list of service groups that they can select from appear. They can either select a specific service group to view the services within that group, or they can search for a service by entering service key words.

**Figure 127: Service Group Setup on Cross-Agency Settings Page in ACA Admin**



**Figure 128: Service Groups on the Select Services Page for Super Agency**



### To group services for super agency

1. Navigate to **Citizen Access Setup > General Settings > Cross-Agency Settings**.

*Citizen Access Setup displays the Cross-Agency Settings page.*

2. Click the **Create New Service Group** button or select a service group from the --Select a service group--drop down list.

*Citizen Access Setup displays the available service list.*

3. Enter a service group name such as Food in the Service Group Name field.

4. Designate an order in the Order field for the service group.

5. To add or remove services:

- Select the desired services in the Available Service list on the left and click the **Add** button.

Optionally, drag a desired service from the Available Service list and drop it into the Selected Service list.

*Citizen Access Setup adds the selected services into the service group.*

- Select the services in the Selected Service list on the right and click the **Remove** button to remove the undesired services from the service group.

Optionally, drag an undesired service in the Selected Service list on the right and drop it into the Available Service list.

*Citizen Access Setup removes the selected services from the service group.*

6. To confirm or cancel your choice.

- To confirm your choice, click the **OK** button.

- To cancel your choice, click the **Cancel** button.

7. To delete an existing service group, select a service group and click the **Delete** button.

### Cross-agency service group descriptions

Citizen Access Administration includes a description field where you can provide citizens with detailed descriptions of the services offered by the agencies in your multi-agency environment. You can include any relevant information you want citizens to be aware of, including links formatted in standard html.

To add descriptions of the services offered on your citizen-facing website:

1. Login to Citizen Access Administration.

2. Navigate to **General Settings > Cross-Agency Settings**.

3. Select the service group where you want the description to display.

Cross-Agency Settings 

Service Group

Click New to create a new service group. Modify properties or view an existing service group.

Combined Services

Service Group Name: Combined Services

Service Group Description: Residents of Petaluma can apply for building permits by selecting an option below. <br><br> Residents of Paradise, please click <a href = "https://citizenaccess.paradise.com"> here. </a>

Available Service (6 items)

-  (CLOUD01)JANICE-APPLICATION(CLOUD01)
-  (CLOUD01)Licenses application(CLOUD01)
-  New Service(CLOUD01)
-  New Test Service(CLOUD01)
-  Test(CLOUD01)
-  Test Service(CLOUD01)

OK Cancel Delete

4. Enter the service group description. You can include any relevant information you want citizens to be aware of (up to 4,000 characters), including links formatted in standard html.
5. Click **OK** to save your changes. You can click the OK button even if it does not have focus. You will receive confirmation that your changes were saved.

When a citizen navigates to the Select Services page, the service group description displays:

The screenshot shows the 'metropolis' Civic Platform website. At the top, there's a blue header bar with the word 'metropolis' in white. Below it, a navigation bar includes links for 'Announcements', 'Logged in as: Test Tester', 'Collections (0)', 'Cart (4)', 'Home', 'Permits' (which is highlighted in a dark box), 'Planning', 'Complaint / Service Request', and 'Licenses'. A sub-navigation menu under 'Permits' lists 'Create an Application by Selecting Services', 'Apply for a Permit', and 'Obtain a'. The main content area is titled 'Select Services' and features a search bar with a magnifying glass icon and a 'Search' button. Below the search bar, a section titled 'Combined Services' contains the text: 'Residents of Petaluma can apply for building permits by selecting an option below.' and 'Residents of Paradise, please click [here](#)'. The entire screenshot is framed by a light gray border.

## Associating a Logo with an Agency

Civic Platform offers a way to give the agency branding so that users can easily recognize the source of information. This is done by associating an image or logo with an ASI subgroup in the Logo portlet of Civic Platform. For example, if your agency relates to other agencies, you can create an ASI subgroup representing each agency and associate the city, county, or state logo with it. This is particularly useful if your agency implements Citizen Access for multi-service administration. During the record creation process, the public user views fees allocated to an application from the state and city which they live. An image displays next to the agency name as an indicator of which fees relate to the state and which fees relate to the city as shown on [Figure 129: Agency Logo View on the Fee Detail page in Citizen Access](#). The Agency logos appear on the Fee page, ASI Subgroup, and Payment page in ACA.

To configure this feature properly, you must configure the related Standard Choices and upload an image in the administrative Logo portlet. The Standard Choice turns on the logo feature and the Logo portlet allows you to browse and upload the image you want associated with each agency.

Figure 129: Agency Logo View on the Fee Detail page in Citizen Access

**Permit Application**

1 Contacts → 2 Enter Information → 3 Review → **4 Fees Details** → 5 Receipt

**Step 4: Fees Details**

Listed below are preliminary fees based upon the information you're entered. Some fees are based on the quantity of work items installed or repaired. Enter quantities where applicable. The following screen will display your total fees.

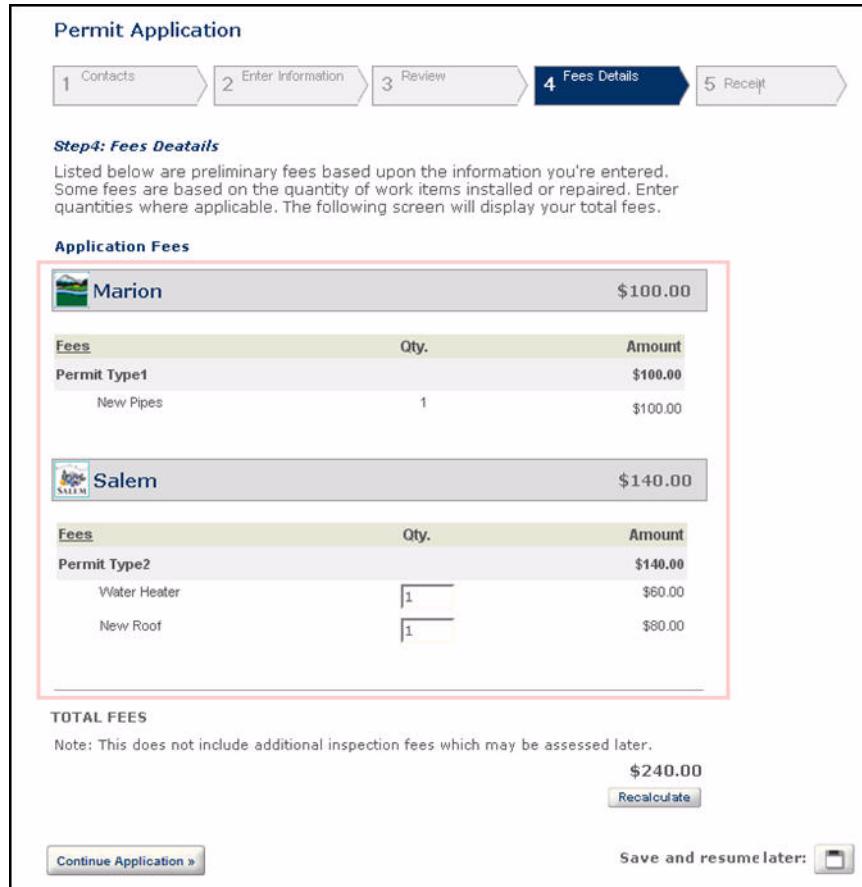
**Application Fees**

Fees	Qty.	Amount
Permit Type1		\$100.00
New Pipes	1	\$100.00
Permit Type2		\$140.00
Water Heater	1	\$60.00
New Roof	1	\$80.00

**TOTAL FEES**

Note: This does not include additional inspection fees which may be assessed later.

\$240.00



### To associate a logo with an Agency

1. Configure the Standard Choices MULTI\_SERVICE\_SETTINGS and LOGO\_TYPE\_CATEGORY. The configuration is to define the agency logo type (ASI Subgroup) used in ACA to retrieve the agency logo. For detailed information about Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

2. Navigate to **Civic Platform > Admin > Setup menu > Agency Profile > Logo**.

*Civic Platform displays the administrative Logo portlets.*

Agency	Logo Type	File Name	Logo URL	Description	Rec Date
ACCELA	USERINFOLOGO	bridgevie...		Bridgevie...	03/04/2008
AMS	USERINFOLOGO	oLogo.jpg		Agency Logo	03/15/2006
FLAGSTAFF	USERINFOLOGO	userinfo.jpg			07/26/2005

3. Choose one of the following options:

- Click the **New** button to create a new Agency Logo association.
- Click the name of an existing agency from the Logo list.

4. Complete or update the Logo fields as described in [List 13: Logo Field Descriptions on page 568](#).

5. Click the **Save** button.

**List 13: Logo Field Descriptions**

<b>Agency</b>	Use the drop-down list to select the Agency name. This is a required field.
<b>Description</b>	Provide a brief description of the graphic used as the Agency Logo.
<b>File Name</b>	Click the <b>Browse</b> button to search and select the image you want associated with the Agency.
<b>Logo Type</b>	Use the drop-down list to select the ASI Subgroup Name.
<b>Logo URL</b>	Provide the image URL in this field when the image you want to use as the Logo is saved on the Web.

## Viewing and Searching Cross-Agency Records

Cross-agency related records display in one centralized/consolidated view in the record detail page of Citizen Access. No configuration is required for this feature. Citizens can view parent, child, sibling views from multiple agencies. See [Viewing cross-agency records](#).

Additionally, citizens can search for records by record status type across all agencies in your multi-agency environment. See [Searching cross-agency records by status type](#).

## Viewing cross-agency records

To view cross-agency related records in Citizen Access:

1. Navigate to the appropriate module.
2. Click **Search Applications**.
3. Click a record ID, and then select **Record Info > Related Records**. The default Related Records view for the selected record displays, showing the parent and child relationships of the selected record. This default view shows "directly related records."

The screenshot shows a web-based application interface for viewing related records. At the top, there is a header with the record number and name: "Record 15CAP-00000041: Building/ACA/JANICE/JANICE" and "Record Status: Approved for Issuance". Below the header, there are three tabs: "Record Info", "Payments", and "Education". The "Record Info" tab is currently selected. Under the "Record Info" tab, there is a section titled "Related Records". Within this section, there is a button labeled "View Entire Tree >". Below this button, there is a table-like structure displaying a hierarchical list of records. The columns are "Record Number" and "Record Type". The data is as follows:

Record Number	Record Type
15CAP-00000039	Building/ACA/JANICE/JANICE
15CAP-00000041	Building/ACA/JANICE/JANICE
COM-1600003	Residential Building Repair
15CAP-00000841	Permits/Sign/Temp/NA
16CAP-00000005	Building/ACA/JANICE/JANICE
16CAP-00000-0001	Permits/Ella/OKC/New
15CAP-00000041	Building/ACA/JANICE/JANICE
COM-1600003	Residential Building Repair
SFR-15-0003	Residential New Single Family
15CAP-00000041	Building/ACA/JANICE/JANICE
COM-1600003	Residential Building Repair
SFR-15-0006	Residential New Single Family
15CAP-00000041	Building/ACA/JANICE/JANICE
COM-1600003	Residential Building Repair
SFR-16-0003	Residential New Single Family
15CAP-00000041	Building/ACA/JANICE/JANICE
COM-1600003	Residential Building Repair

4. Click **View Entire Tree** for a broader hierarchical view that displays the selected record in relation to its grandparent, child, grandchild, and sibling records:

**Record 15CAP-00000041:**  
**Building/ACA/JANICE/JANICE**  
**Record Status: Approved for Issuance**

Record Info ▾	Payments ▾	Education ▾
<b>Related Records</b>		
<a href="#">« Back to Directly Related Records</a>		
Record Number	Record Type	
▼ SFR-15-00003	Residential New Single Family	
▼ 15CAP-00000041	Building/ACA/JANICE/JANICE	
▼ COM-1600003	Residential Building Repair	
16CAP-00000019	iris renew parent cap type	
▼ SFR-15-00006	Residential New Single Family	
▼ 15CAP-00000041	Building/ACA/JANICE/JANICE	
▼ COM-1600003	Residential Building Repair	
16CAP-00000019	iris renew parent cap type	
▼ 16CAP-00000027	Permits/Sign/Temp/NA	
▼ 16CAP-00000068	CaseManagement/Amy/SA-Cloud01/NoComponent	
▼ 16CAP-00000-00001	Permits/Ella/OKC/New	
▼ 15CAP-00000041	Building/ACA/JANICE/JANICE	
▼ COM-1600003	Residential Building Repair	
16CAP-00000019	iris renew parent cap type	
▼ SFR-16-00003	Residential New Single Family	
▼ 15CAP-00000041	Building/ACA/JANICE/JANICE	
▼ COM-1600003	Residential Building Repair	
16CAP-00000019	iris renew parent cap type	

## Searching cross-agency records by status type

Citizens can search for records by record status type across all agencies in your multi-agency environment. To enable this feature, add the Status Type field to your search forms.

To add the Status Type field to your search forms:

1. Login to the Citizen Access Administration site.
  - a. As shown in the screen below, select a module at the bottom of the left navigation pane.
  - b. Select the **Record Home** page in the left navigation pane.

- c. Click the **General Search** field in the Record Home page on the right.

The screenshot shows the Accela Civic Platform's Citizen Access Administrator Guide. On the left, there is a sidebar titled "Page Flow Configuration" with a tree view of pages. A red circle labeled "A" highlights the "Building" category, which is expanded to show "Record Home". Another red circle labeled "B" highlights the "Record Home" item under the Building category. On the right, the main content area is titled "General Search". It contains several search fields: "Record Number", "Record Type" (with a dropdown menu), "Project Name", "Agency" (set to "CLOUD01"), "Record Status" (dropdown menu), "Start Date" (set to 02/25/2014) and "End Date" (set to 02/25/2016), "License Type" (dropdown menu), "State License Number" (text input), "First", "Last", and "Name of Business" (all three are empty), "Business License #", "Street No.", "Direction" (dropdown menu), "Street Name", "Street Type" (dropdown menu), "Unit Type" (dropdown menu), "Unit No.", "Parcel No.", "City", "State", and "Zip". Red circles labeled "C" highlight the "General Search" button at the top right of the search form and the "Record Home" link in the sidebar.

2. When you click the **General Search** section depicted above, the page becomes editable so you can add the Status Type field.
3. Add the **Status Type** field by selecting the checkbox in the **Field Properties** pane on the right.

**Building Record Home \***

Select the search type from the drop-down list.

**General Search**

Record Number:	Record Type:	
--Select--	--Select--	
Project Name:	Agency:	Record Status:
--Select--	CLOUD01	--Select--
Start Date:	End Date:	
02/25/2014	02/25/2016	
License Type:	State License Number:	
--Select--	--Select--	
First:	Last:	Name of Business:
Business License #:		
Country:		
--Select--		

[Search Additional Criteria](#)

**Field Properties**

Name of Business	<input checked="" type="checkbox"/>
Name of Business 2	<input type="checkbox"/>
Business License #	<input checked="" type="checkbox"/>
Country	<input checked="" type="checkbox"/>
Street No.	<input checked="" type="checkbox"/>
Start Fraction	<input type="checkbox"/>
Street # (end)	<input type="checkbox"/>
End Fraction	<input type="checkbox"/>
Direction	<input checked="" type="checkbox"/>
Prefix	<input type="checkbox"/>
Street Name	<input checked="" type="checkbox"/>
Street Type	<input checked="" type="checkbox"/>
Street Suffix	<input type="checkbox"/>
Unit Type	<input checked="" type="checkbox"/>
Unit No.	<input checked="" type="checkbox"/>
Unit # (end)	<input type="checkbox"/>
Parcel No.	<input checked="" type="checkbox"/>
Lot	<input type="checkbox"/>
Subdivision	<input type="checkbox"/>
Secondary Road	<input type="checkbox"/>
Secondary Road Num...	<input type="checkbox"/>
Neighborhood Prefix	<input type="checkbox"/>
Neighborhood	<input type="checkbox"/>
Description	<input type="checkbox"/>
House # Alpha (start)	<input type="checkbox"/>
House # Alpha (end)	<input type="checkbox"/>
Status Type	<input checked="" type="checkbox"/>

4. Click **Save**.
5. Click **Clear Cache**.
6. Click **Rearrange Fields** if you want to reposition the field on the form using Form Designer.

## Configuring Amendment Record Functionality

Administrators can configure the ability for public users to create an amendment record in the ACA flow process. An amendment record is a child record of the original parent record and inherits some information from the parent record for processing. This type of record creation is useful when a public user wants to renew a license. The public user license information is taken through the renewal process by the child record without affecting the original parent record in any way. When a public user wants to apply for a new commercial license, the public user accesses his current licenses, and click the "Create Amendment" button. With the Create Amendment option, Civic Platform automatically populates the personal, business contact, and other information from the parent record on the amendment license application intake form. The amendment record relates to the original record through the renewal process. When users pay

for the associated fees and issue the license is, the new expiration date for the license applies to the original parent record.

In order for this feature to function properly, administrators must perform two configurations. They must define the Combine Button with Record Type section on the Modular Setting page in the Citizen Access Setup. This determines records of what type and at what status can offer the Create Amendment button option. Then, in the Record Type Filter section, an administrator creates or edits a record type filter to include the record types that are available as amendment record types. You can associate a record type filter with the Create Amendment button for all the records in a module that have the Create Amendment button on their Record Detail pages. You can also associate a filter with the Create Amendment button for the records that are of a specified record type and at a specified status. The first setting takes precedence over the second setting. If you want the second setting to take effect, you must not associate any filter to the Create Amendment button in the first setting. If the administrator does not associate any record type filter with the Create Amendment button, the button does not display to public users on the Record Detail page.

For complete configuration details for the Record Type Filter and Combine Button with record type, refer to [Combine Button with Record Type on page 118](#).

### Topics

- [Displaying the Create Amendment Button on Record Detail Page](#)
- [Creating a Record Type Filter](#)
- [Associating a Record Type Filter to the Create Amendment Button](#)
- [Checking Out Amendment Functionality in Daily Site](#)

## Displaying the Create Amendment Button on Record Detail Page

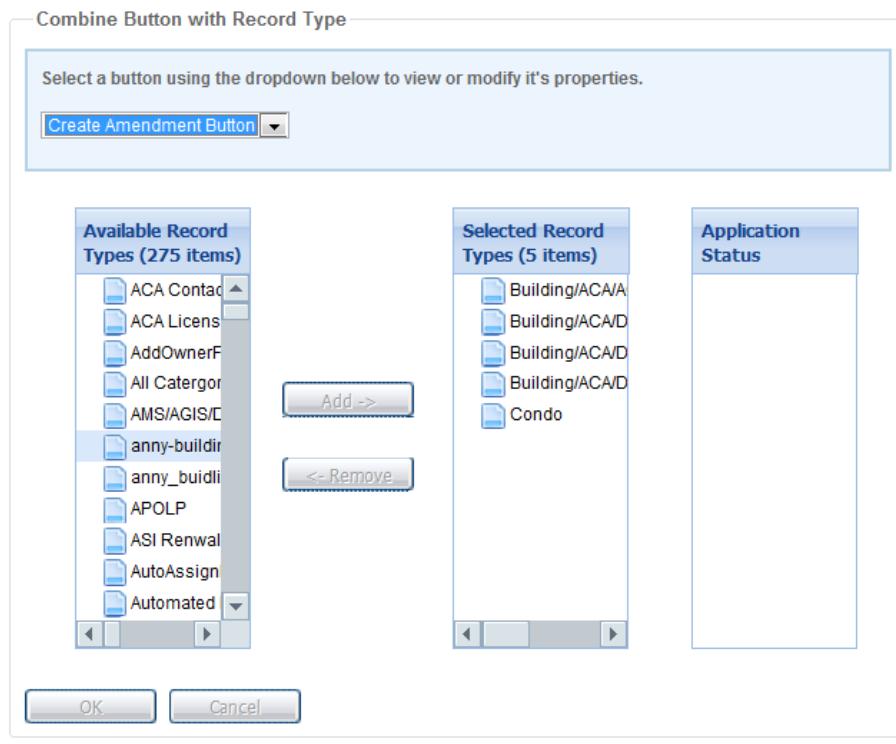
### To display the Create Amendment button on Record Detail page

1. Navigate to **Citizen Access Setup > Module Settings** page.

*Citizen Access displays the Module Settings page.*

2. From the Combine Button with Record Type drop-down list, select **Create Amendment Button**.

*Citizen Access displays a list of record types available and a list of record types previously selected to display the Create Amendment button.*



3. Select the record types and record statuses to display the Create Amendment button. These records are the parent records.

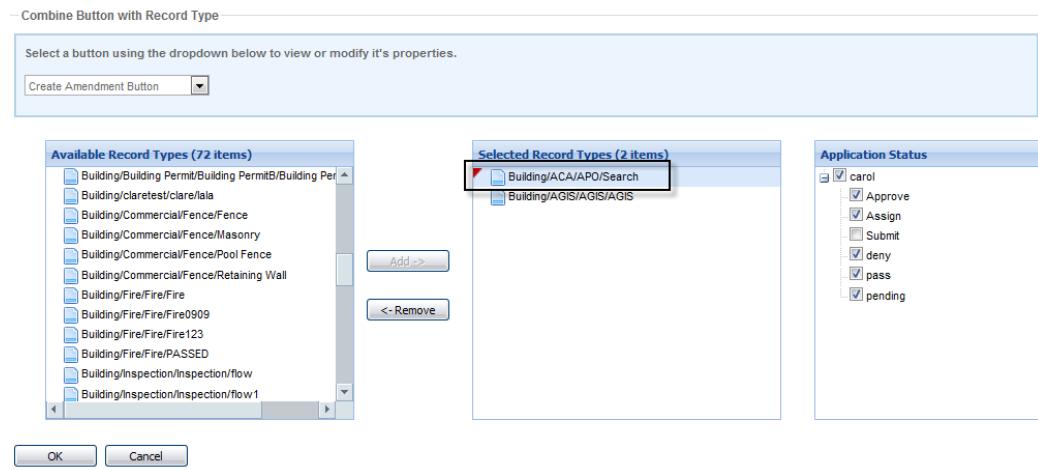
- a. Add records to or remove records from the Selected Record Types list:

To add a record to the Selected Record Types list, highlight the desired record type in the Available Record Types list, click the Add button.

To remove a record from the Selected Record Types list, highlight the desired record in the Selected Record Types list, and click the Remove button.

- b. Select the record status from the Application Status list:

*Citizen Access Setup displays a red flag next to the record type name as an indication to you that the status options are modified.*



- 1) Highlight the desired record type in the Selected Record Types list.

*Citizen Access Setup displays the available statuses in the Application Status list.*

- 2) Mark the check boxes for the desired statuses.  
c. Click the **OK** button.

## Creating a Record Type Filter

### To create a record type filter

For detailed information on how to create a record type filter, see [Creating or Editing a New Record Type Filter on page 124](#).

## Associating a Record Type Filter to the Create Amendment Button

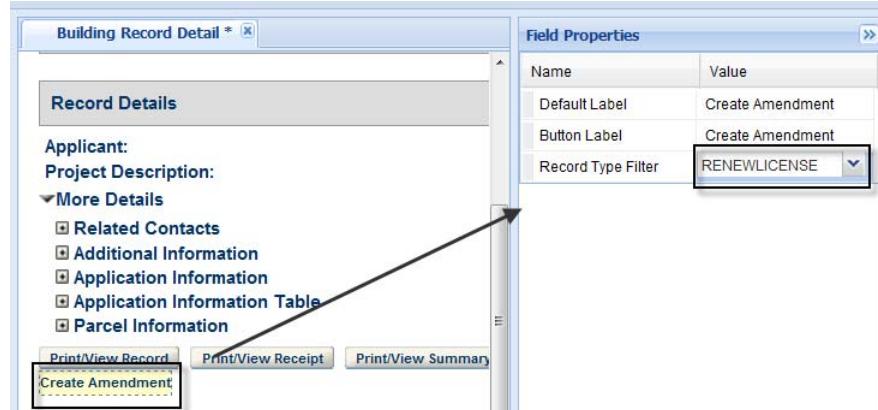
### To associate a record type filter to the Create Amendment button

- For all the parent records in a module that have the Create Amendment button on their Record Detail pages.

Those records may be of different record types and at different record statuses, depending on which record types and what statuses you specified in the Combine Button with Record Type section. For detailed information, see [Displaying the Create Amendment Button on Record Detail Page on page 573](#).

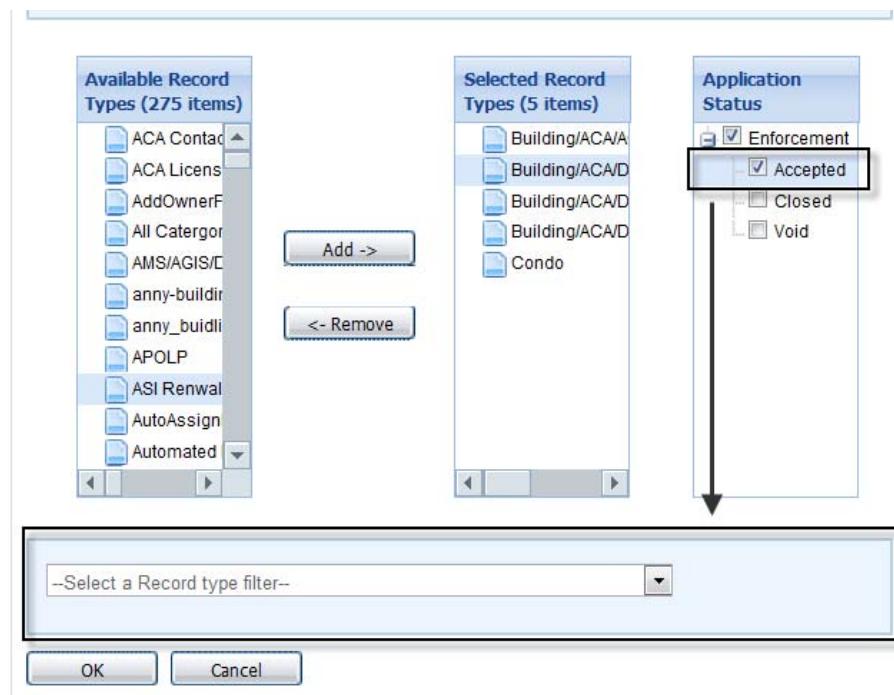
- a. Navigate to the module Record Details page.
- b. In Record Details page, click Create Amendment button.

- c. In Field Properties, click the Value cell next to Record Type Filter and select the desired filter from the drop-down list.



- For the parent records that are of a specified record type and at a specified status. The setting in the Record Details page takes precedence over the setting below. For the setting below to take effect, you must not select any filter in the Record Details page.
- a. Navigate to the Module Settings page.
  - b. In Combine Button with record type, select a particular record type and a record status.
  - c. Highlight the selected status name.

*Citizen Access Setup displays a drop-down list at the bottom of the section.*



- d. Select a filter from the drop-down list to associate it to the Create Amendment button.

- e. Repeat the **step b** to **step d** to associate each record type status to a filter.

## Checking Out Amendment Functionality in Daily Site

### To check out amendment functionality in daily site

After configuration, the Create Amendment button is applied to the desired modules, record types and record type statuses.

#### For example

1. Public user searches for and opens a parent record.

Record 11CAP-00001506: [Add to collection](#)  
Building/ACA/alice/alice

**Work Location**

**Record Details**

**Licensed Professional:**  
Donald T. Ross  
2094 Ridgewood Rd.  
Lake Oswego, OR, 97034-  
ARCHITECT 0664

[View Additional Licensed Professionals>>](#)

► **More Details**

[Copy Record](#)  
**Create Amendment**

► **Fees**

► **Inspections**

► **Processing Status**

2. The user clicks the **Create Amendment** button on the Record Details page.

*Citizen Access displays the available amendment record types.*

The screenshot shows a web-based application interface for Citizen Access. At the top, there is a navigation bar with five tabs: Home, Building, APCD, Agriculture Weights and Measures, and Licenses. Below the navigation bar, there is a horizontal row of links: Create an Building Application, Obtain a Fee Estimate, Search Applications, and Schedule an Inspection. The main content area is titled "Select an Amendment Type". Inside this area, there is a message: "Choose one of the following available amendment types. For assistance or to apply for an amendment type not listed below please contact us." Below this message, there are two radio buttons: one selected for "Building/ACA/APO/Search" and another for "Building/ACA/carol/renewal applicaton". At the bottom of the form, there is a "Continue Application »" button.

3. The user selects the amendment record type and clicks the Continue Application button.
4. The user then completes the rest of the application as a child record. For more information about record type filters, refer to [Record Type Filters on page 122](#).
5. Click the **Save** button.

**APPENDIX D:**

# LDAP AUTHENTICATION AND SSO

Citizen Access supports LDAP authentication and Single Sign-on (SSO), thus helps your agency better manage internal users and external users, and application security. For protected content, only authenticated and authorized users have permission to access. For unprotected content, all public users can access quickly without authentication or authorization. The LDAP or SSO support provides public users with a single, secure, and easy access point to your agency's information and services.

This appendix details how to enable LDAP authentication and how to enable single sign-on with Oracle Access Manager. You can choose any of these solutions to improve your public user management across your agency website and Citizen Access.

**Topics**

- [LDAP Authentication](#)
- [Single Sign-On \(SSO\)](#)

## LDAP Authentication

This topic guides you through configuring LDAP support in Citizen Access. These instructions assume that you are familiar with LDAP authentication and Citizen Access.

**Topics**

- [Overview](#)
- [Enabling and Configuring LDAP Authentication](#)

## Overview

LDAP (Lightweight Directory Access Protocol) is a standard for user authentication and a centralized directory for storing user identity. Citizen Access can integrate with any LDAP-compliant directory such as Oracle Internet Directory. With LDAP authentication enabled, public users can log in to Citizen Access from an agency's website with the same user ID and password for login to the agency website. Public users register accounts on the agency website, instead of Citizen Access. In other words, only the agency website maintains the user accounts.

The first time a registered public user accesses Citizen Access from an agency's website, the Citizen Access Account Registration page appears. The User ID from the agency website appears as read only and the password hides. The public user needs to enter information that

Citizen Access requires for registered public users that public users have not previously entered during the user account registration on the agency website. After application information is collected, the registered public user can access the protected content provided by Citizen Access and the Citizen Access public user account may be auto-activated based on agency's settings.

The second time a registered public user accesses Citizen Access from an agency website, and for all subsequent accesses, the user only needs to log in to Citizen Access with the same user ID and password as used by the agency website.

## Enabling and Configuring LDAP Authentication

You must follow these steps to set up LDAP authentication for Citizen Access.

### To enable and configure LDAP authentication

1. Set the following FIDs to Read Only to prevent public users and their licenses from changes through Civic Platform:
  - 8223-Citizen Admin
  - 8224-Citizen Admin Supervisor

For more information about the FIDs, see the listings in the Function IDs Reference chapter of the *Accela Civic Platform Configuration Reference*.

2. Configure the following Standard Choice values in Standard Choice ACA\_CONFIGS to enable LDAP authentication in Citizen Access and prevent public users from registering accounts through Citizen Access:

- Set the value description to Yes for ENABLE\_LDAP\_AUTHENTICATION.
- Set the value description to No for REGISTRATION\_ENABLED.

After you set the value description to Yes for ENABLE\_LDAP\_AUTHENTICATION, the Login Information section hides the following password-related fields: Password, Type Password Again, Select a Security Question, and Answer.

For more information about the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

3. If your agency does not need public users to activate their Citizen Access accounts through e-mail verification and EMSE event, do both of the following:

- Disable e-mail verification in Citizen Access Setup.
  - 1) Navigate to **Citizen Access Setup > General > Registration Settings**.
  - 2) Scroll down to **Auto-Activation Settings**.
  - 3) Mark the check box next to **Enable Auto-Activation and Stop Sending Account Verification E-mail**.
- a. Disable or remove the scripts that relate to the *RegistrationSubmitAfter* event in Civic Platform Classic Administration.

*Public user accounts is automatically activated upon creation.*

4. Do all the following to hide the password-related fields (Password, Type Password Again, Select a Security Question and Answer) from Citizen Access:
  - a. Navigate to **Citizen Access Setup > General > Registration > Enter Information**.
  - b. .
5. Update or add the parameters in the LDAP configuration file *LdapConfiguration.config* as shown in [Table 28: Parameters in LDAP Configuration File on page 582](#).

The *LdapConfiguration.config* file resides in the *<Citizen Access installation directory>\Config*. For example,  
C:\Inetpub\wwwroot\720\Bridgeview\Config\LdapConfiguration.config.

Here is an example of the *LdapConfiguration.config* file.

```
<?xml version="1.0"?>
<configuration>
    <configSections>
        <section name="LdapConfiguration"
type="Accela.ACA.Common.Config.LdapConfiguration, Accela.A
CA.Common" />
    </configSections>
    <LdapConfiguration
        ServerUrl="LDAP://ldap.bridgeview.gov:389"
        BaseDN="cn=External,cn=Users,dc=bridgeview,dc=com"
        SearchScope="Subtree"
        UserFilterString="(&(cn=$$UserID$$)(objectClass=perso
n))"
        BindUser="Chuck"
        BindPassword="1234"
        CertificatePath="">

        <AttributesMapping>
            <Attribute name="Email"          dbname="email"
maxlength="80"      extname="mail" />
            <Attribute name="FirstName"     dbname="firstName"
maxlength="70"      extname="givenName" />
            <Attribute name="MiddleName"    dbname="middleName"
maxlength="70"      extname=" " />
            <Attribute name="LastName"      dbname="lastName"
maxlength="70"      extname="sn" />
            <Attribute name="Gender"        dbname="gender"
maxlength="1"      extname=" " />
            ...
        </AttributesMapping>
    </LdapConfiguration>
</configuration>
```

**Table 28: Parameters in LDAP Configuration File**

Parameter	Value Description
<b>ServerUrl</b>	Specify the URL of the LDAP server, including host name (or IP address) and port number.
<b>BaseDN</b>	Specify the starting point for the search in the directory tree.
<b>SearchScope</b>	Specify the depth of user searches by entering one of these values: <ul style="list-style-type: none"><li>• Base. Search the base only.</li><li>• OneLevel. Search the base and one level of subtrees.</li><li>• Subtree. Search the base and all subtrees.</li></ul>
<b>UserFilterString</b>	Specify the filter pattern for user searches. The filter pattern must have a placeholder named \$\$UserID\$\$ to match the user ID. The actual user ID replaces \$\$UserID\$\$ in the search process.  Note: Use "&" to replace the "&" character in the value.
<b>BindUser</b>	Specify the Windows account name or distinguished name of the root user for binding before any LDAP operation. The user must have permission to perform a user search.
<b>BindPassword</b>	Specify the root user password for binding.
<b>CertificatePath</b>	Specify the full file path to the x509 certificate. The certificate establishes secure connections with the LDAP server. The best practice is to place the certificate under the Citizen Access installation root directory. If the certificate sits under any other folder, administrators must set the folder permission to allow the host account of the Citizen Access web application to read the folder. In IIS 6 and IIS 7, the default host account is Network Service.
<b>AttributesMapping</b>	Map each user information field in Citizen Access to a field in the LDAP server so Citizen Access can synchronize user information with the LDAP server. Here are the properties for each attribute. <ul style="list-style-type: none"><li>• name. Name is the user information field in Citizen Access.</li><li>• dbname. Ddbname is the user information field in Civic Platform database.</li><li>• maxlength. Maxlength is the maximum length of the field that Civic Platform database allows.</li><li>• extname. Specify the corresponding user information field in the LDAP server. You can leave it blank as "".</li></ul> Note: Do not change the name, dbname, and maxlength properties above.

## Single Sign-On (SSO)

This topic guides you through integrating Oracle Access Manager with Citizen Access to support single sign-on. These instructions assume that you are familiar with single sign-on, Oracle Access Manager, and Citizen Access.

### Topics

- [Overview](#)
- [Preparing Your Environment](#)

- Best Practices to Ensure Successful Single Sign-On
- Enabling Single Sign-On with Oracle Access Manager

## Overview

Single sign-on (SSO) is a session/user authentication process that permits a user to enter one name and password to access multiple applications. Your agency can use a third-party application such as Oracle Access Manager to manage public user identity and access across the agency website and its embedded applications such as Citizen Access.

Currently Citizen Access can integrate with Oracle Access Manager to support single sign-on. Therefore, public users can automatically log in to Citizen Access without typing their usernames and passwords if they already logged in to the agency website. Alternatively, if public users already logged in to Citizen Access and are redirected to the agency website, Citizen Access can be automatically recognize them as registered public users and they can access the protected resources without login to the agency website.

## Preparing Your Environment

Make sure your environment meets these requirements for configuring single sign-on:

- Integrate Citizen Access with Oracle Access Manager 11g
- Install Oracle Access Manager SDK 10g for .Net on the Citizen Access web server
- Turn on "Enable 32-Bit Applications" for the Citizen Access application pool if IIS is 64-bit
- Do not install Webgate in the web site of Citizen Access

## Best Practices to Ensure Successful Single Sign-On

Here are some best practices for you to ensure successful single sign-on support:

- Create an individual website for Citizen Access to separate Citizen Access from the other applications on IIS.  
If other applications share one website with Citizen Access, Citizen Access affects these applications.
- Avoid associating any scripts with the *BeforeLoginEMSE* and *AfterLoginEMSE* events.  
Citizen Access uses the agency's universal login page which does not support those two events.
- Prevent public users from registering “anonymous” (case-insensitive) as the user ID in Oracle Access Manager.  
Citizen Access regards that user ID as an anonymous user and thus prevents the user from accessing protected resources.
- Synchronize the system time of the Citizen Access web server and the Oracle Access Manager server.  
Oracle Access Manager generates the authentication token that may expire due to the time difference between the two servers, which could result in a single sign-on failure.

## Enabling Single Sign-On with Oracle Access Manager

This section describes the tasks that you must complete to enable single sign-on with Oracle Access Manager. You must perform the tasks in the order in which they are listed.

### Topics

- [Task 1 Configuring Civic Platform and Citizen Access](#)
- [Task 2 Configuring Oracle Access Manager \(OAM\)](#)
- [Task 3 Installing Oracle Access Manager SDK](#)
- [Task 4 Running ACA\\_OAM Installer and Configuring AccessGate](#)
- [Task 5 Configuring Internet Information Services \(IIS\)](#)

## Task 1 Configuring Civic Platform and Citizen Access

### To configure Civic Platform and Citizen Access

1. Set the following FIDs to Read Only to prevent public users and their licenses from changes through Civic Platform:
  - 8223-Citizen Admin
  - 8224-Citizen Admin Supervisor

For more information about the FIDs, see the listings in the Function IDs Reference chapter of the *Accela Civic Platform Configuration Reference*.

2. If your agency does not need public users to activate their Citizen Access accounts through e-mail verification and EMSE event, do both of the following:
  - Disable e-mail verification in Citizen Access Setup.
    - 1) Navigate to **Citizen Access Setup > General > Registration Settings**.
    - 2) Scroll down to **Auto-Activation Settings**.
    - 3) Mark the check box next to **Enable Auto-Activation and Stop Sending Account Verification E-mail**.
  - Disable or remove the scripts that relate to the *RegistrationSubmitAfter* event in Civic Platform Classic Administration.

*Public user accounts is automatically activated upon creation.*

## Task 2 Configuring Oracle Access Manager (OAM)

### To configure Oracle Access Manager

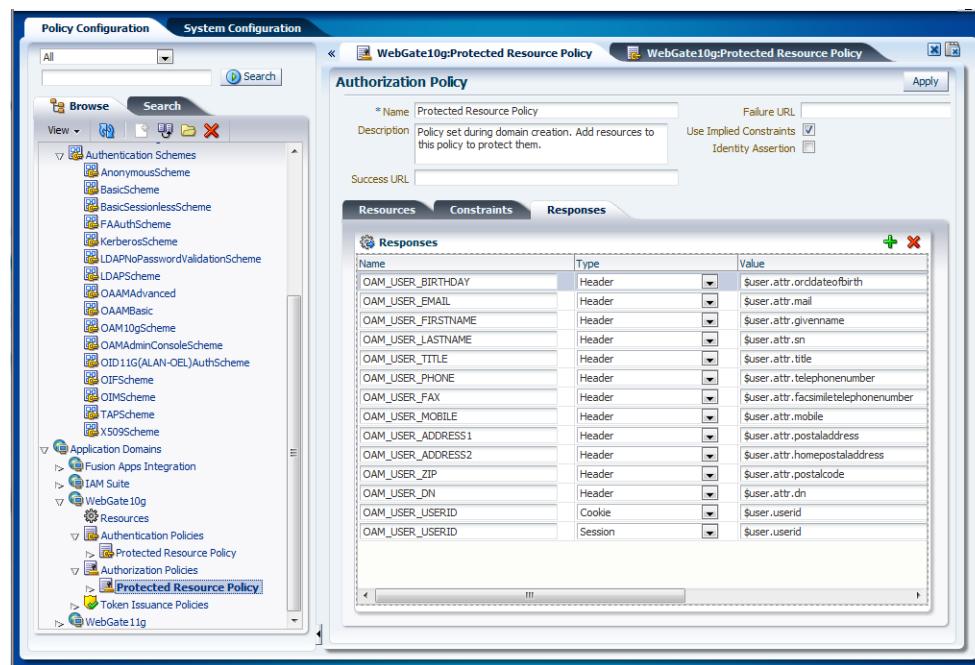
1. Set up an SSO agent and policies and set all Citizen Access resources as protected.
  - a. Go to OAM Administration Console and click **New OAM 10g Webgate**.

*The console displays the Create OAM 10g Webgate tab.*

**Note:** For IIS, Oracle Access Manager 11g only supports 10g Webgate.

- b. Complete the fields on the Create OAM 10g Webgate tab.
- c. Configure the policies to make sure all resources of Citizen Access are protected.
2. Configure policy responses.
  - a. Go to **OAM Administration Console > Policy Configuration** tab.
  - b. Expand the **Application Domains** node > desired **domain name** node > **Authorization Policies** node.

The domain name is the same as the agent name that you entered in the first step.
- c. Double-click the desired authorization policy, and click the **Responses** tab.



- d. Add the desired response items.

Each response item represents a field of a Citizen Access user account. And the type of response items must be “Header”.

For user attribute definitions, please refer to:

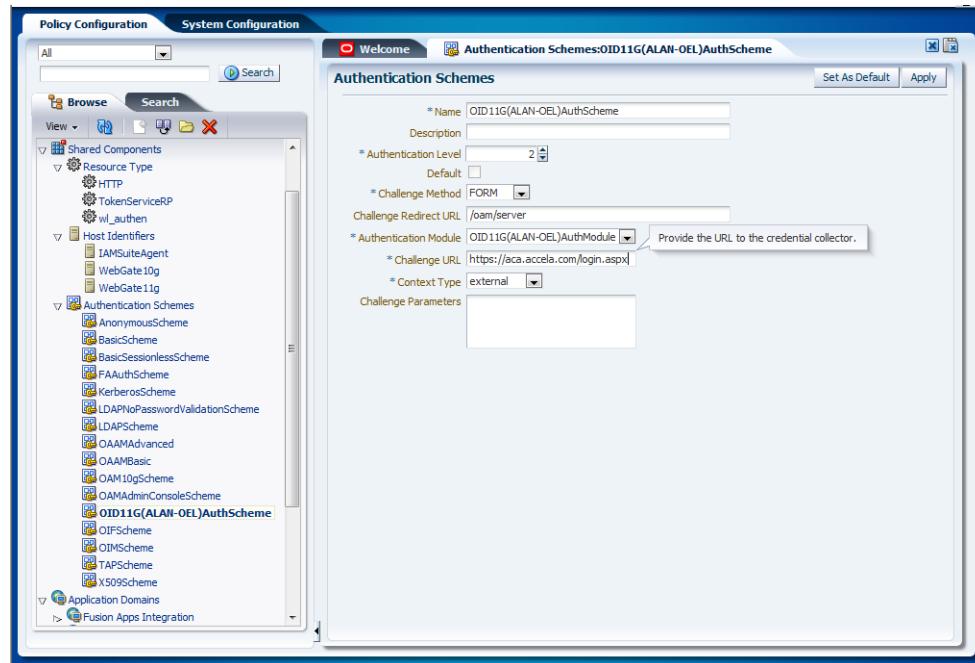
[http://docs.oracle.com/cd/E12839\\_01/oid.1111/e10035/schema\\_attrs.htm](http://docs.oracle.com/cd/E12839_01/oid.1111/e10035/schema_attrs.htm)

**Note:** *The first time a public user is redirected to Citizen Access from an agency website and authorized in Citizen Access, Citizen Access automatically creates a public user account according to the response items in Oracle Access Manager and grants the user a default user role.*

*The Contact Method field of the user account is specific to Citizen Access so it is automatically populated with one of the available contact methods stored in Oracle Access Manager based on the priority: e-mail, mobile phone, work phone, home phone, and fax (highest priority first). For example, if there already exist an e-mail address and a fax number, the contact method is set to e-mail. If there is no contact method available, the Contact Method field is blank. Receive SMS is also an Citizen Access specific field. It is automatically marked if there is a mobile phone number stored in Oracle Access Manager.*

3. Configure the authentication scheme.
  - a. Go to OAM Administration Console > Policy Configuration tab.
  - b. Expand the **Authentication Schemes** node and double-click the desired scheme.

*The console displays the Authentication Schemes tab.*



- c. Complete the fields as necessary. Here is a description of two important fields. If you need more information about the authorization scheme, go to

[http://docs.oracle.com/cd/E14571\\_01/doc.1111/e15478/shared.htm#CHDEECFH](http://docs.oracle.com/cd/E14571_01/doc.1111/e15478/shared.htm#CHDEECFH).

<b>Challenge Method</b>	Select “FORM” from the drop-down list.
<b>Challenge URL</b>	Enter the URL of the universal login page in the Challenge URL field.
<b>Note:</b>	<i>Make sure the universal login page can work in iframe. So when Citizen Access is embedded into your agency website frame, and public users access Citizen Access without login to your agency website, Citizen Access can redirect them to an accessible universal login page.</i>

## Task 3 Installing Oracle Access Manager SDK

The Access Manager SDK enables you to create a specialized AccessGate on the Citizen Access web server, which helps you with the public user access management.

### To install Oracle Access Manager SDK

1. Download the Access Manager SDK from Oracle official website:  
[http://download.oracle.com/otn/nt/middleware/11g/ofm\\_oam\\_core\\_win\\_10.1.4.3.0\\_disk1\\_1of1.zip](http://download.oracle.com/otn/nt/middleware/11g/ofm_oam_core_win_10.1.4.3.0_disk1_1of1.zip)

**Note:** For .NET platform, Oracle Access Manager 11g only has SDK 10.1.4.3.
2. Extract the package and double-click *Oracle\_Access\_Manager10\_1\_4\_3\_0\_Win32-dotnet20\_AccessServerSDK.exe* to install the SDK and complete the settings below:
  - Grant the Modify permission to the Citizen Access web application hosting account for the SDK installation directory.
  - Add the “<Access Manager SDK Install Dir>\oblix\lib” to the Windows environment variable “Path”. For example, add “C:\Program Files\NetPoint\AccessServerSDK\oblix\lib”.

## Task 4 Running ACA\_OAM Installer and Configuring AccessGate

### To run ACA\_OAM installer and configure AccessGate

1. Run the installer ACA\_OAM\_<version number>.exe to complete the installation.  
This installer copies the OAM-related files to the specified folder and enable OAM single sign-on authentication. Get the installation program and the corresponding installation guide from Accela Customer Support.
2. Configure AccessGate on the Citizen Access web server.

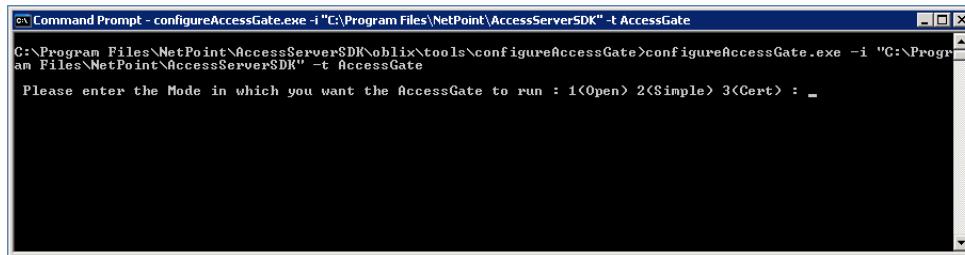
- a. Open a command window and locate this path: "<Access Manager SDK Install Dir>\oblix\tools\configureAccessGate".

**Note:** If the Citizen Access web server uses Windows 7 or Windows Server 2008, you must open a command window in Administrator mode.

- b. Execute the following command to complete the AccessGate configuration:

```
configureAccessGate.exe -i "<Access Manager SDK install directory>" -t AccessGate
```

*This command describes the “-i” parameter as “AccessGate”.*



**Note:** During the AccessGate configuration, you need to provide the following information configured in the OAM server:

- Access Server Security Mode
- Webgate ID
- WebGate password
- Access Server ID
- Access Server Host Name
- Access Server Port

3. Configure the Accela.ACA.OAMAccessGate.dll.config file.

The Accela.ACA.OAMAccessGate.dll.config file resides in the <Citizen Access install directory>/bin folder. For a description of the parameters in this file, see [Table 29: Parameters in Accela.ACA.OAMAccessGate.dll.config on page 589](#).

Here is an example of the file.

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
    <configSections>
        <section name="OAMConfiguration"
            type="Accela.ACA.OAMAccessGate.OAMConfiguration, Accela.ACA.OAMAccessGate" />
```

```

</configSections>
<OAMConfiguration
    ASDKInstallDir="C:\Program Files\NetPoint\AccessServerSDK"
    HostIdentifier="WebGate10g"
    ChallengeURL="https://oam.bridgeview.gov:14101/oam/server/
    obrareq.cgi"
    RegisterURL="https://oam.bridgeview.gov:14001/oim/faces/pages/
    USelf.jspx"
    LogoutURL="https://oam.bridgeview.gov:14101/oam/server/logout">
    <AttributesMapping>
        <Attribute name="Email"          dbname="email"
        maxlength="80"      extname="OAM_USER_EMAIL" />
        <Attribute name="FirstName"      dbname="firstName"
        maxlength="70"      extname="OAM_USER_FIRSTNAME" />
        <Attribute name="MiddleName"     dbname="middleName"
        maxlength="70"      extname=""/>
        <Attribute name="LastName"       dbname="lastName"
        maxlength="70"      extname="OAM_USER_LASTNAME" />
        <Attribute name="Gender"         dbname="gender"
        maxlength="1"      extname=""/>
        <Attribute name="Salutation"     dbname="salutation"
        maxlength="255"     extname=""/>
        <Attribute name="BirthDate"      dbname="birthDate"
        maxlength=" "      extname="OAM_USER_BIRTHDAY" />
        <Attribute name="Address"        dbname="address"
        maxlength="200"     extname="OAM_USER_ADDRESS1" />
        <Attribute name="Address2"       dbname="address2"
        maxlength="200"     extname="OAM_USER_ADDRESS2" />
        ...
    </AttributesMapping>
</OAMConfiguration>
</configuration>

```

**Table 29: Parameters in Accela.ACA.OAMAccessGate.dll.config**

Parameter	Value Description
<b>ASDKInstallDir</b>	Specify the Access Manager SDK installation directory without the "/" or "\" suffix.
<b>HostIdentifier</b>	Specify the Host Identifier defined on the server of Oracle Access Manager to indicate the HTTP resources.

**Table 29: Parameters in Accela.ACA.OAMAccessGate.dll.config (Continued)**

Parameter	Value Description
<b>ChallengeURL</b>	Specify the URL that points to the virtual path of the "obrareq.cgi" file on the Oracle Access Manager server.  <b>Note:</b> <i>If the Oracle Access Manager server works in SSL mode, you must enter the HTTPS URL in this field. Follow these steps to check the server works in SSL mode or not:</i> 1 - Go to Oracle Access Manager Administration Console > System Configuration tab. 2 - Expand the Access Manager Settings section and double-click the Access Manager Settings node. 3 - Check the OAM Server Protocol and OAM Server Port fields in the Load Balancing section.
<b>RegisterURL</b>	Specify the URL for user account registration. It is the URL that the Register for an Account link in Citizen Access points to.
<b>LogoutURL</b>	Specify the URL for user logout from the Oracle Access Manager server.
<b>AttributesMapping</b>	Map each user information field in Citizen Access to a response item in Oracle Access Manager so Citizen Access can synchronize user information with the OAM server. Here are the properties for each attribute. <ul style="list-style-type: none"> <li>• name. User information field in Citizen Access.</li> <li>• dbname. User information field in Civic Platform database.</li> <li>• maxlength. Maximal length of the field that Civic Platform database allows.</li> <li>• extname. Specify the corresponding response name of the authorization policy in Oracle Access Manager. You can leave it blank as "". For more information about the response items in the authorization policy, see <a href="#">Task 2 Configuring Oracle Access Manager (OAM) on page 584</a>.</li> </ul> <b>Note:</b> <i>Do not change the name, dbname, and maxlength properties above.</i>

## Task 5 Configuring Internet Information Services (IIS)

You must configure the IIS server to enable the HTTP handler to intercept all requests to "http(s)://<ACA web server>/obrar.cgi".

After users log in to the Oracle Access Manager server, current HTTP requests are redirected to the URL "/obrar.cgi" under the requested web server. The destination URL contains the authentication token and the user requested URL. The HTTP handler creates the single sign-on cookie based on the authentication token and directs user to the requested URL.

The IIS server version can either be 7.0, 7.5 or 8.0. Follow the configuration steps in this section to configure IIS.

**Note:** Make sure the application pool of the website root is set to .NET Framework 4.0.

## Topics

- [Configuring IIS Classic Mode](#)
- [Configuring IIS Integrated Mode](#)

### **Configuring IIS Classic Mode**

If your Citizen Access web server uses IIS 7.0, 7.5 or 8.0, and the website application pool runs in classic mode, follow these instructions.

#### To configure IIS classic mode

1. In IIS Manager, navigate to the Citizen Access website and then double-click **Handler Mappings**.
2. On the Handler Mappings page, in the Actions pane, click **Add Script Map**.
3. Complete these fields on the Edit Script Map window:

**Request Path**

Enter "/obrar.cgi".

**Executable**

Browse to "%SystemRoot%\Microsoft.NET\Framework\<.net 4.0 version number>\aspnet\_isapi.dll".

**Name**

Enter a name such as 'AccessGateObrarHandler'.

4. Click the **Request Restrictions** button, and unmark the "Invoke handler only if request is mapped to" check box on the Mapping tab of the Request Restrictions window.
5. Add the content below to the "configuration/system.web/httpHandlers" section in the "web.config" file under the root folder of the Citizen Access website:

```
<add path="/obrar.cgi" verb="*" type="Accela.ACA.OAMAccessGate.ObrarHttpHandler" />
```

If the "web.config" file does not exist, create it.

**Note:** *The web.config file is applicable to all of the applications hosted on the same website. So if multiple .NET applications are running on the same website with Citizen Access, add the content below to the "configuration/system.web/httpHandlers" section in the web.config file for those applications which does not need Single Sign-On support:*

```
<remove path="/obrar.cgi" verb="*" />  
Here is an example of the web.config file.  
<?xml version="1.0" encoding="UTF-8"?>  
    <configuration>  
        <system.web>  
            <httpHandlers>  
                <remove path="/obrar.cgi" verb="*" />  
            </httpHandlers>  
        </system.web>  
    </configuration>
```

6. Restart your IIS server.

### **Configuring IIS Integrated Mode**

If your Citizen Access web server uses IIS 7.0, 7.5 or 8.0, and the website application pool runs in integrated mode, follow these instructions.

#### **To configure IIS Integrated Mode**

1. In IIS Manager, right-click the Citizen Access website, navigate to the Citizen Access website, and then double-click **Handler Mappings**.
2. On the Handler Mappings page, in the Actions pane, click **Add Managed Handler**.
3. Complete these fields on the Add Managed Handler window:

**Request Path** Enter "/obrar.cgi".

**Type** Enter "Accela.ACA.OAMAccessGate.ObrarHttpHandler".

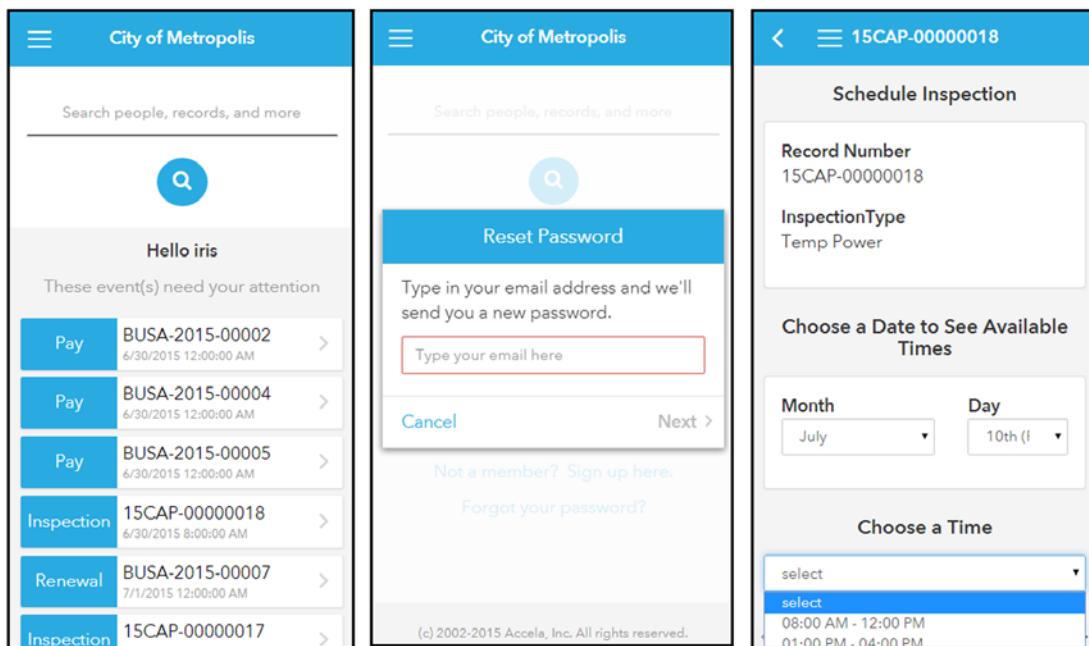
**Name** Enter a name such as 'AccessGateObrarHandler'.

4. Click the **Request Restrictions** button, and unmark the "Invoke handler only if request is mapped to" check box on the Mapping tab of the Request Restrictions window.
5. Restart your IIS server.

## APPENDIX E: MOBILE CITIZEN ACCESS

The mobile Citizen Access website is available immediately out of the box, with no customization necessary, and includes the following:

- A modern, mobile-friendly user experience that is consistent with the new look and feel of the desktop site
- Operating system detection, which automatically redirects to the mobile site from mobile devices
- Responsive design, with screen rotation and resizing
- Support for anonymous access



You have the option to disable automatic re-direct to the mobile site. The default setting is to automatically redirect users to the mobile site when they access it from mobile devices. However, agencies that want to limit access to only the desktop site (agencies that have extensive customizations to their site, for example) may choose to disable access to the mobile site. See [Configuring Mobile Citizen Access Settings](#).

## Mobile Citizen Access Functionality

The Mobile Citizen Access website includes the following functionality. For full functionality citizens should use the desktop site.

**Registered users can:**

- Create and modify collections
- Filter, view, and search for records
- Reset passwords
- Schedule, cancel, and reschedule inspections, with ability to request specific days/times and specify inspection ready-time
- Search for any record details; results are grouped by category and retained for easy access to subsequent searches
- View conditions
- View related records
- View process status (e.g. "Amendment received.")

**Anonymous users can:**

- Access the site anonymously, with the following subset of functionality:
  - Filter, view, and search for records
  - Schedule inspections (if anonymous inspection scheduling is enabled in ACA Admin)
  - View Address/Parcel/Owner details

## Configuring Mobile Citizen Access Settings

You can configure the following settings for your mobile Citizen Access site:

- Display your agency name on the login screen
- Disable access to the mobile site

**To configure mobile Citizen Access settings**

1. In ACA Admin, navigate to **General > Global Settings > Mobile Website Settings**.

*The following page displays.*

Global Settings \*

Official Web Site

Official Web Site Setting: Enter the URL of the official Web site. Users will be directed to the Web site for additional information if a work location cannot be found during the application process.

Enter the Official Web Site URL:

Mobile Website Settings

Auto Redirect to Mobile Website: Citizens will be automatically redirected to the mobile citizen access website if they try to access the citizen access URL from a mobile device. Please check the box below if you want to stop this auto redirect to the Mobile Citizen Access Website.

Disable Auto redirect to Mobile citizen Access Website

Agency Name on the Mobile Website: Type the agency name in the box below. This name will be visible on the mobile citizen access website and help your citizens know that they are on the correct website. Agency service provider code will be used if there is no entry in the box below.

Your Agency Name

2. To disable automatically redirecting to the Citizen Access mobile site, select **Disable Auto-redirect to Mobile Citizen Access Website**. With this option selected, users will only have access to the desktop site.
3. To display your agency name on the login screen, enter your preferred text in the Agency Name field.
4. Click **Save**.
5. Click **Clear Cache**.

**APPENDIX F:**

# LEGISLATIVE MANAGEMENT

---

The Legislative Management solution enables you to manage your agency's public meetings and engage your community in the process. You can use the new Legislative Management solution to streamline legislative meetings, from document creation to video presentation. Citizens can watch videos of hearings and meetings and view agendas and transcripts with just a few clicks.

## Topics

- [Setting Up Citizen Access for Legislative Management Integration](#)
- [Using the Legislative Management Functionality in Citizen Access](#)

## Setting Up Citizen Access for Legislative Management Integration

### *FIDs and Standards Choices*

- Update existing standard choice, ACA\_CONFIGS, with a new value that defines the URL used by the Legislative Management tool.

**Value**                    LEGISLATIVE\_MANAGEMENT\_URL

**Value Desc**            enter agency URL (for example, <http://ouragency.gov>)

**Status**                Select **Enable**.

- Update existing standard choice, ACA\_CONFIGS\_TABS, with a new value adds Legislative Management as a tab at the top of the Citizen Access home page, and defines what to display when a user clicks the tab.

<b>Value</b>	LEGISLATIVE_MANAGEMENT
<b>Value Desc</b>	<p>Use this format for the value description:</p> <pre>label=[info], order=[info], role={info}, url=[info],module=[module name], tabvisible=[info].</pre> <p>where</p> <pre>label=aca_sys_default_Legislative_Management order=5 (or other numeral representing order of display, left to right) role=0 1 (for both registered and anonymous users) url=/LegislativeManagement.aspx tabvisible=yes</pre>
<b>Status</b>	Select <b>Enable</b> .

### **ACA Admin Configuration**

The Legislative Management feature must be enabled for Citizen Access.

#### **To enable Legislative Management functionality**

1. In ACA Admin, navigate to **General > Global Settings > Legislative Management Settings**.

*The following displays.*

Legislative Management Settings

Enable Legislative Management Section

Enable Legislative Management Tab

Set the Legislative Management Server URL: [\(?\)](#)

2. Configure the settings:

<b>Enable Legislative Management Section</b>	Select this option to display Legislative Management options on the record detail page.
<b>Enable Legislative Management Tab</b>	Select this option to display the Legislative Management module tab on the home page.
<b>Set the Legislative Management Server URL</b>	Enter the Legislative Management Server URL. This must match the server URL specified in the standard choice value LEGISLATIVE_MANAGEMENT_URL for the ACA_CONFIGS standard choice (See <a href="#">FIDs and Standards Choices</a> ).

3. Click **Save**.
4. Click **Clear Cache**.

## Using the Legislative Management Functionality in Citizen Access

Citizens can view hearing videos, agendas, transcripts, and more by accessing relevant records in Citizen Access.

Use case: A city planner processes a record in Automation, which triggers a hearing workflow. When a decision is reached, the Legislative Management system is invoked and the workflow updates. Any available videos, agendas, etc. are available for citizens to view.

### ***Viewing Videos and Agendas in Citizen Access***

1. Log in to Citizen Access.
2. Click the Legislative Management tab.

*Citizen Access displays the meeting calendar.*

The screenshot shows the Citizen Access interface with the 'Legislative Management' tab selected. The main content area is titled 'Meeting Calendar' and displays a list of meetings for January 2015. Each meeting entry includes a date, time, location, and a row of links for 'Agenda', 'Agenda Packet', 'Minutes', 'Minutes Packet', and 'Video'. An annotation with an arrow points from the text 'Use these links to view agendas, minutes, videos, and more.' to the 'Video' link in the first meeting entry. The 'RSS' icon is also visible in the top right corner.

January, 2015	
<a href="#">Jan 5, 2015 8:15 AM</a>	<a href="#">Agenda</a>   <a href="#">Agenda Packet</a>   <a href="#">Minutes</a>   <a href="#">Minutes Packet</a>   <a href="#">Video</a>
Committee on Council - Regular Committee Meeting	
<a href="#">Jan 5, 2015 10:00 AM</a>	<a href="#">Agenda</a>   <a href="#">Agenda Packet</a>   <a href="#">Minutes</a>   <a href="#">Minutes Packet</a>   <a href="#">Video</a>
Atlanta City Council - Regular Meeting	
<a href="#">Jan 13, 2015 6:30 AM</a>	<a href="#">Agenda</a>   <a href="#">Agenda Packet</a>   <a href="#">Minutes</a>   <a href="#">Minutes Packet</a>   <a href="#">Video</a>
City Utilities Committee - Regular Committee Meeting	
<a href="#">Jan 13, 2015 9:30 AM</a>	<a href="#">Agenda</a>   <a href="#">Agenda Packet</a>   <a href="#">Minutes</a>   <a href="#">Minutes Packet</a>   <a href="#">Video</a>
Community Development & Human Resources Committee - Regular Committee Meeting	
<a href="#">Jan 13, 2015 12:00 PM</a>	<a href="#">Agenda</a>   <a href="#">Agenda Packet</a>   <a href="#">Minutes</a>   <a href="#">Minutes Packet</a>   <a href="#">Video</a>
Public Safety & Legal Administration Committee - Regular Committee Meeting	
<a href="#">Jan 14, 2015 6:30 AM</a>	<a href="#">Agenda</a>   <a href="#">Agenda Packet</a>   <a href="#">Minutes</a>   <a href="#">Minutes Packet</a>   <a href="#">Video</a>
Zoning Committee - Regular Committee Meeting	

3. You can specify:
  - The calendar year you want to view.
  - The meeting type you want to view (zoning, city council, or public safety, for example).
  - The view type: list or calendar view.
4. Click a link to view the associated content. For example, click **Video**.

*Citizen Access streams the video in a new browser window.*

 **MediaTraq Webcast**



Finance/Executive Committee  
Regular Committee Meeting  
3/25/2015 10:00 AM

**Downloads:**

-  Agenda  Agenda Packet
-  Minutes  Minutes Packet

**A. CALL TO ORDER**

**B. INTRODUCTION OF MEMBERS PRESENT**  
Roll Call

**C. STATUS REPORT**  
1. Megan Middleton - Legislative Update

**D. ADOPTION OF AGENDA**

**E. APPROVAL OF MINUTES**

**CONSENT AGENDA**

Hide Outline Files

**San Ramon Testing Environment**



**Finance/Executive Committee**  
**Regular Committee Meeting**  
**Council Chamber**  
**Wednesday, March 25, 2015**  
**10:00 AM**

**Instructions**

To see the details on any agenda item click on the outline on the left hand side and the item will appear. So now in one place you can watch or listen to your public meetings, follow along with the they are talking about. You can even download the entire minutes and agenda if they are available be available for all meetings.

 Try it now! Click an **agenda item** on the left.  
Agenda items in **the navy color** will show additional details.

[Click here for the  
Legislation Amendment Form](#)

**APPENDIX G:**

# CONFIGURING THE CONDITION DOCUMENT COMPONENT

**Topics**

- Condition Document Configuration Topics
- Condition Document Topics for Citizen Access

## Condition Document Configuration Topics

- [DOCUMENT\\_CONDITION\\_TYPE\\_FILTER](#)

### **DOCUMENT\_CONDITION\_TYPE\_FILTER**

This Standard Choice defines the document types that the Condition Document section in Citizen Access requires public users to upload.

Before configuring this Standard Choice, you should define a condition type, and add conditions under the condition type. Each condition represents a required document type, and must have the same name as the document type. You can define more than one condition type, and group conditions (required document types) by condition types.

Standard Choice values can include:

**{Enter a condition type to a Standard Choice Value}.** Each condition type contains conditions that represent the required document types in the Condition Document section.

## Condition Document Topics for Citizen Access

**Topics**

- Defining Conditions for the Required Document Types
- Configuring the Script for the Condition Document Component
- Configuring the DocumentUploadAfter Event

### **Defining Conditions for the Required Document Types**

Administrators shall define conditions for the document types required in the Condition Document component.

**To define the conditions for the required document types**

1. Access the **Conditions Maintenance** portlet in Accela Automation.
2. Create a condition type in the **Condition** administration portlet.
3. Add new conditions that belong to the condition type. Optionally, you can add condition groups first, and then add the new conditions in condition groups.

Each condition represents a required document type.

- You must assign each condition name with the name of a required document type. For example, if a required document type is "LICENSE REVOKED/ANNULLED/CANCELLED DOCUMENTATION", create a condition with the name "LICENSE REVOKED/ANNULLED/CANCELLED DOCUMENTATION".
- The other condition settings are not used for this functionality.

4. Navigate to **Agency Profile > Standard Choices** in Classic Admin.
5. Configure the Standard Choice DOCUMENT\_CONDITION\_TYPE\_FILTER and set the Standard Choice Value to the condition type created in [step 2](#).
6. If necessary, you can repeat [step 2](#) to [step 3](#), and add more condition types to the Standard Choice Values in DOCUMENT\_CONDITION\_TYPE\_FILTER.

## Configuring the Script for the Condition Document Component

The Condition Document component gets the required document type information via a script. This section guides you to create the script, and associate it with the Onload event of the page that contains the Condition Document component.

**To configure the script for the Condition Document component**

1. Get the condition IDs of the conditions which you created for the required document types.
  - a. Create a .txt file. For example, condition\_seq.txt.
  - b. Copy the following SQL statement into the .txt file.

```
SELECT R3_CON_NBR FROM
R3CLEAR
WHERE SERV_PROV_CODE = 'your_agency' and R3_CON_DES like
'LICENSE REVOKED'
```

- c. Update the WHERE clause in the statement.
    - Set a.serv\_prov\_code to your agency name
    - Set R3\_CON\_DES to the condition name for which you want to get the condition ID.
  - d. Run the SQL statement in the Accela Automation database console.

The R3\_CON\_NBR field in the return value shows the condition ID of the specified condition.

- e. If necessary, repeat **step c** and **step d** to get the condition IDs of more conditions.
2. Add the script in Classic Admin to get the required document types via the condition IDs.
  - a. From the Classic Admin portlet, click **Admin Tools > Events > Scripts**
  - b. Click **Submit** to return a list of existing scripts.
  - c. Click **Add**.
  - d. Enter the **Script Code** and **Script Title**, for example, ACA\_PF\_CAPCONDITION.
  - e. Copy the following script into the Script Content section.

```
var cap = aa.env.getValue("CapModel");
var capId = cap.getCapID();
var sysDate = aa.date.getCurrentDate();
var currentUserID = aa.env.getValue("CurrentUserID");
var systemUserObj =
aa.person.getUser(currentUserID).getOutput();

aa.capCondition.createCapConditionFromStdCondition(capId,
652);
aa.capCondition.createCapConditionFromStdCondition(capId,
653);

function addAppCondition(cType, cStatus, cDesc, cComment,
cImpact) {
    var addCapCondResult =
aa.capCondition.addCapCondition(capId, cType, cDesc,
cComment, sysDate, null, sysDate, null, null, cImpact,
systemUserObj, systemUserObj, cStatus, currentUserID,
"A")
    if (addCapCondResult.getSuccess()) {
        logDebug("Successfully added condition (" +
cImpact + ") " + cDesc);
    }
    else {
        logDebug("***ERROR: adding condition (" + cImpact +
"):" + addCapCondResult.getErrorMassage());
    }
}

function getCapID(id1, id2, id3) {

var s_capResult = aa.cap.getCapID(id1, id2, id3);
if (s_capResult.getSuccess())
    return s_capResult.getOutput();
```

```
        else {
            logDebug("**ERROR: Failed to get capId: " +
s_capResult.getErrorMessage());
            return null;
        }
    }

function logDebug(debug)
{
    aa.print(debug);
}
```

- f. Locate the line with  
`aa.capCondition.createCapConditionFromStdCondition`, and replace the second parameter (such as 652, 653) in the method with the condition ID that you obtained in [step 1](#).
- g. If there are more required document types, you can add more lines calling the method `createCapConditionFromStdCondition`, and specify the condition IDs for the document types.
- h. Click **Add**.
3. In ACA Admin, go to the target module and click the **Page Flow Configuration** tab.
4. Choose a page flow from the Page Flow drop-down list. The page flow is associated with the record type for which you want to apply the Condition Document component.
5. Drag and drop the **Condition Document** component into a page in the page flow.
6. Navigate to the **Properties** section of the page.
7. In the Onload event, select the script that you created for getting the required document type. For example, `ACA_PF_CAPCONDITION`.
8. Click **Save**.

## Configuring the DocumentUploadAfter Event

To make sure Citizen Access saves the documents in the Condition Document section to the database, you must activate the `DocumentUploadAfter` event, and associate the event with the following script.

```
/*-----
-----|
| BEGIN Event Specific Variables
/-----
-----*/
var documentModelArray =
aa.env.getValue("DocumentModelList");
```

```
logDebug("documentModelArray = " + documentModelArray);
var documentUploadedFrom= aa.env.getValue("From");
logDebug("documentUploadedFrom = " +
documentUploadedFrom);
var documentUploadStatus =
aa.env.getValue("UploadStatus");
logDebug("documentUploadStatus : " +
documentUploadStatus);
var capIdString = aa.env.getValue("CapID") ;
var startDate = new Date();
var startTime = startDate.getTime();
var message = "";
// Message String
var debug = "";
// Debug String
var br = "<BR>";

// Service Provider Code
var currentUserID = aa.env.getValue("CurrentUserID");
// alternate cap id string
var publicUser = false;
if (currentUserID.indexOf("PUBLICUSER") == 0) {
currentUserID = "ADMIN"; publicUser = true }

/*
-----/
| END Event Specific Variables
/-----
-----*/
-----*/



// Exit if triggered from anything other than ACA, since
the CAPID is not populated
if (documentUploadedFrom != "ACA")
{
    aa.env.setValue("ScriptReturnCode", "0");
    aa.env.setValue("ScriptReturnMessage", "");
    aa.abortScript()
}

if(capIdString != null && capIdString != "")
{
// Break Tag
```

```
var sca = String(capIdString).split("-");  
var capId =  
aa.cap.getCapID(sca[0],sca[1],sca[2]).getOutput()  
var cap=aa.cap.getCap(capId).getOutput();  
// Cap object  
var servProvCode=capId.getServiceProviderCode()  
  
// Current User  
var capIDString=capId.getCustomID();  
  
var partialCap = !cap.isCompleteCap();  
  
logDebug("partialCap = " + partialCap);  
  
if(partialCap && documentModelArray != null)  
{  
var documentModels = documentModelArray.toArray();  
var documentModel = null;  
var conditionNumber = 0;  
logDebug("documentModels.length = " +  
documentModels.length);  
for(i = 0; i<documentModels.length;i++)  
{  
documentModel = documentModels[i];  
conditionNumber = documentModel.getConditionNumber();  
logDebug(" i = " + i);  
logDebug("Condition Number = " + conditionNumber);  
if(conditionNumber != null && conditionNumber != 0)  
{  
var capConditionResult =  
aa.capCondition.getCapCondition(capId, conditionNumber);  
if(capConditionResult.getSuccess())  
{  
var capCondition = capConditionResult.getOutput();  
var conditionGroup = capCondition.getConditionGroup();  
var conditionName =  
capCondition.getConditionDescription();  
documentModel.setDocCategory(conditionName);  
documentModel.setDocDepartment(conditionGroup);  
logDebug("Condition Name - " + conditionName);  
logDebug("Condition Group - " + conditionGroup);  
}
```

```
var updateDocumentResult =
aa.document.updateDocument(documentModel);
if(updateDocumentResult.getSuccess( ))
{
    logDebug("Update document model successfully - " +
documentModel.getDocName());
}
else
{
    logDebug("Update document model failed - " +
documentModel.getDocName());
}
}
else
{
    logDebug("No condition number - " +
documentModel.getDocName());
}
}
}
}
}
}
}
}

function logDebug(debug)
{
    aa.print(debug);
}
```