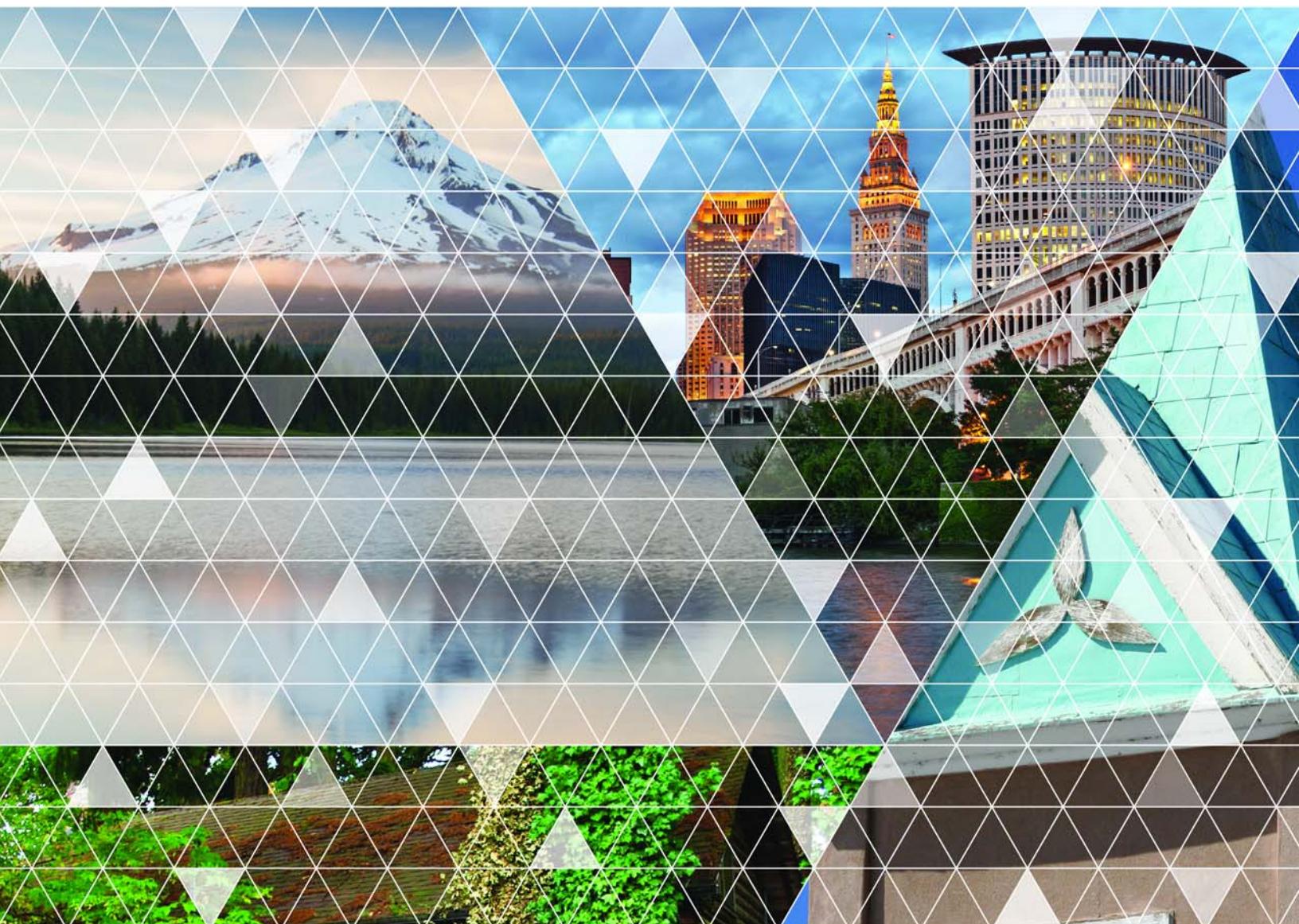


Version 9.3.0

Accela Civic Platform®

Administrator Guide



Accela Civic Platform Administrator Guide

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Getting Started

Before you begin using Civic Platform you must load your product license keys. Then you can begin configuring your Civic Platform environment to best suit the unique needs of your agency, via the Setup portlet.

The Setup portlet enables you to access a wide range of Administration portlets, where you configure your Civic Platform implementation.

Click a topic title below for full details.

Related Information

[Important 9.0.0+ Security Information – Action Required](#)

[Loading Your License Keys](#)

[Navigating to the Setup Portlet](#)

Important 9.0.0+ Security Information – Action Required

Starting with version 9.0.0, Civic Platform applications implement SHA-2 password encryption to comply with the Federal Information Security Management Act (FISMA) information security requirements.

Civic Platform applications have replaced SHA-1 password encryption with [SHA-2 encryption](#) (specifically, SHA-512+SALT hash functions) for FISMA compliance. When logging in Civic Platform, the user's password is automatically converted to the SHA-2 encryption.

The following Civic Platform applications use the SHA-2 password encryption:

- Civic Platform back-office application
- Citizen Access
- Silverlight and JavaScript GIS
- Accela mobile apps using the Automation REST API
- Apps using Construct V4 API



Note: Accela Mobile Office does not currently support SHA-2 password encryption.

Disabling SHA-1 on Accela-hosted Civic Platform environments

At a post-9.0.0 to-be-announced date, Accela-hosted environments will officially migrate to SHA-2 encryption. At that point, Accela will disable SHA-1 encryption so that only SHA-2 passwords are used across Civic Platform applications on the Accela-hosted environments.

Accela Customer Support will send out advanced notifications about the SHA-2 migration, and will ask all Civic Platform users to log into their Civic Platform applications before SHA-1 is disabled.



All users must log into their Civic Platform applications before Accela disables SHA-1. If users do not log into their Civic Platform applications before Accela disables SHA-1, their passwords will continue to use the SHA-1 password encryption and they will be permanently locked out of Civic Platform.

When Accela Customer Support has officially announced the SHA-2 migration date, it is absolutely important and mandatory for all Civic Platform 9.0.0+ users on an Accela-hosted environment to login before Accela disables SHA-1.

Disabling SHA-1 on self-hosted Civic Platform environments

The following information describes how to disable the SHA-1 password encryption on a self-hosted Civic Platform environment. Note that this information only applies to self-hosted (or "on-premise") customers who intend to completely migrate their Civic Platform environment from SHA-1 to SHA-2 password encryption.

If your self-hosted agency decides to disable SHA-1 encryption and only use the SHA-2 password encryption with Civic Platform, the following needs to happen after upgrading Civic Platform from a release prior to 9.0.0:

1. Plan the SHA-2 migration date.

The self-hosted agency must determine a SHA-2 migration date that gives enough time for all Civic Platform users to log in Civic Platform 9.0.0+ (including Civic Platform, Citizen Access, and GIS applications and administration sites, Accela mobile apps, and any app using Construct APIs). Send out advanced notifications and reminders to ensure all Civic Platform users have logged in Civic Platform in a timely manner.

2. All users MUST log into their Civic Platform 9.0.0+ application.

When users log into a Civic Platform 9.0.0+ application, their passwords are automatically converted to SHA-2 encryption.



All users must log into their Civic Platform 9.0.0+ applications before you disable SHA-1 on your Civic Platform environment. If users do not log into their Civic Platform 9.0.0+ applications before you disable SHA-1, their passwords will continue to use the SHA-1 password encryption and they will be permanently locked out of Civic Platform.

If your agency plans to disable SHA-1, it is absolutely important and mandatory for all Civic Platform 9.0.0+ users on your self-hosted environment to login before you disable SHA-1.

3. Disable SHA-1 encryption.

To disable the SHA-1 encryption for the following Civic Platform applications:

- **Civic Platform and Citizen Access:**

1. Connect to the Civic Platform database.
2. Execute the following SQL:

```
UPDATE R1SERVER_CONSTANT SET REC_STATUS = 'A' WHERE SERV_PROV_CODE =
'STANDARDDATA' AND CONSTANT_NAME = 'DISABLE_SHA_1'
```

- **Civic Platform Silverlight GIS:**

1. Navigate to the `inetpub\wwwroot\<agis>\data\GlobalConfigs` directory on the IIS server.
2. Edit the `GlobalSettings.xml` file.
3. Set the `DisableSHA1` key to `True`. For example:

```
<GlobalSettings>
  <add key="DisableSHA1" value="True"
</GlobalSettings>
```

(Note that by default, `DisableSHA1` is set to `False`.)

4. Save your changes.

- **Civic Platform JavaScript GIS:**

1. Connect to the JavaScript GIS database.
2. Execute the following SQL:

```
UPDATE GLOBALSETTING SET DISABLESHA1='True'
```

Loading Your License Keys

Civic Platform requires license keys to access core product functionality. Accela Customer Support provides the license key for each agency. The license key entitles the agency to a fixed number of licenses for one or more of Accela's solutions, including:

- Civic Platform - Asset
- Civic Platform - Land
- Civic Platform - License and Case Management
- Civic Platform - Service Request

Your license entitles you to a fixed number of users for each solution. You can distribute these licenses across the modules that comprise a particular solution, in any way that meets the requirements of your agency. You can assign a single named user account to use one or more modules in a solution, but not a module from another solution.

Your license can entitle you to one or more of the following add-on products that enhance core Civic Platform functionality:

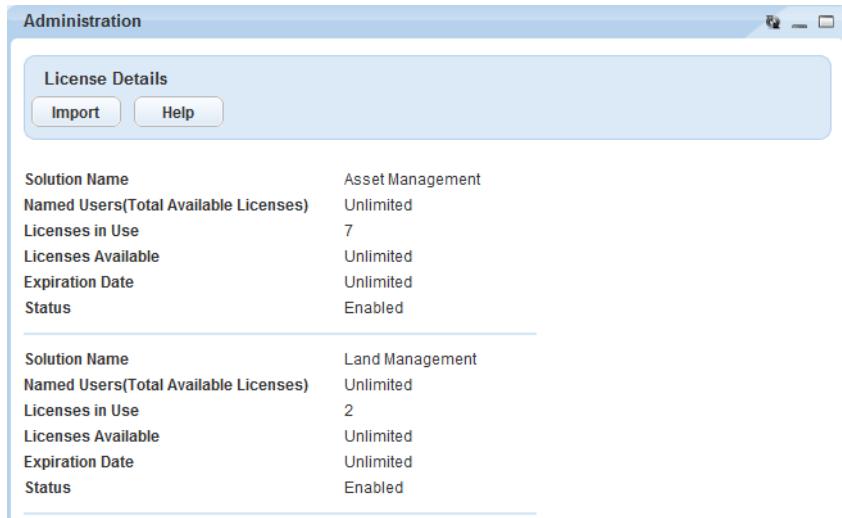
- Citizen Access
- GIS
- IVR
- Mobile Office

Use Case Example

You have five users in your agency and your agency uses three modules (Building, Planning, and Enforcement) for your Land Management solution. You need five user licenses and you can assign these five user accounts to any combination of the three modules. For example, you can assign all five users to each of the modules, and you can also assign two users to the Planning module and three users to both the Building and Enforcement modules.

To load a product license

1. Contact Accela Customer Support to obtain your product license key.
 - For online assistance, go to the Accela Success Community: <https://accela.force.com/success>.
 - For phone assistance, call (888) 7-ACCELA, extension 5, or (888) 722-2352, extension 5. Accela Customer Support representatives are available by phone Monday through Friday, 4:00 AM - 6:00 PM, Pacific Time.
2. Access the Setup Portlet ([Navigating to the Setup Portlet](#)).
3. Go to **System Tools > Product License**.
Civic Platform displays the License Details portlet.



- 4. Click Import.**
- 5. Click Browse.**
- 6. Locate and select your license key file.**
- 7. Click Submit.**
- 8. Restart the IIS server.**

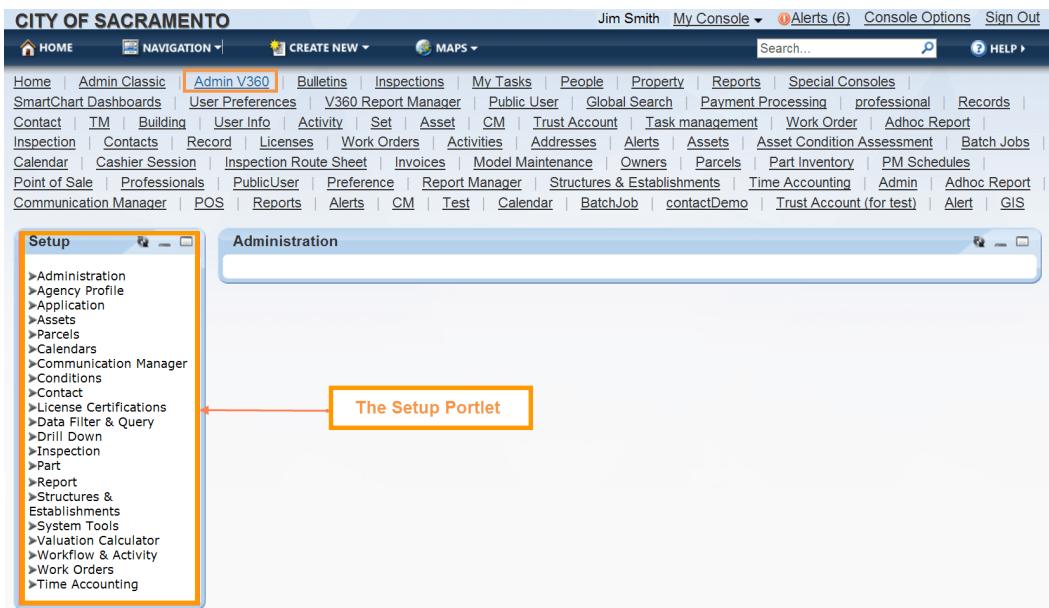
Navigating to the Setup Portlet

The Setup portlet enables you to access the Administration portlets, where you configure your Civic Platform implementation to best suit the unique needs of your agency.

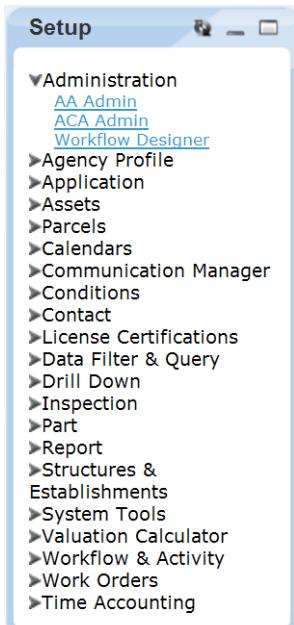
To access the Setup portlet

1. Log in to Civic Platform.
2. Civic Platform displays your personalized home page. The layout of your home page depends on how you have configured your console ([Setting Up Your Console and Home Page](#)).
3. Navigate to Civic Platform Administration.

Civic Platform displays the Setup portlet.



4. Click an arrow next to a menu to expand the menu and view its available options.



5. Click the Administration page you want to work with.

Accessing Classic Administration

Civic Platform provides the “Classic” Administration interface for performing a variety of administrative functions.

To access Classic Administration

1. Create a main link for Classic Administration ([Setting Up Your Console and Home Page](#)).
2. Click the main link for Classic Administration.
Civic Platform displays the Classic Administration page.
3. Click the Admin Tools tab to access administrative functions; click the Daily tab to access daily user functions.

Accessing Record Type Administration

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).

2. Click **Aministration > AA Admin**.

Civic Platform displays the Administration page.



Accessing the Form Layout Editors

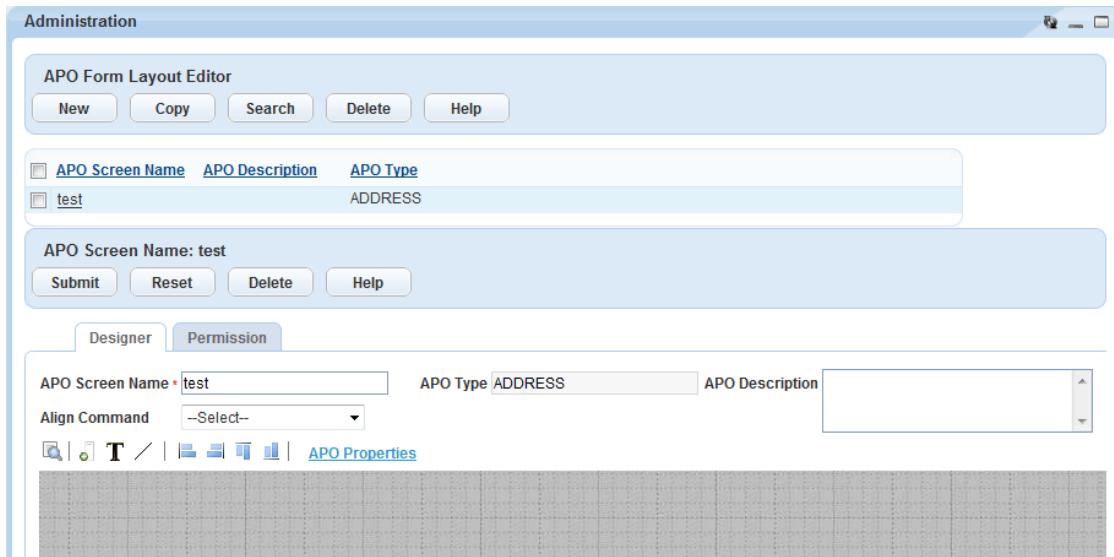
To access a form layout editor

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click one of the following links to open the form layout editor you want to work with.
 - **Agency Profile > APO Form Layout Editor**
 - **Agency Profile > Custom Fields Form Layout Editor**
 - **Agency Profile > Form Portlet Designer**
 - **Assets > Form Layout Editor**

- **Structures and Establishments > Form Layout Editor**

- **Workflow & Activity > TSI Form Layout Editor**

Civic Platform displays the form layout editor

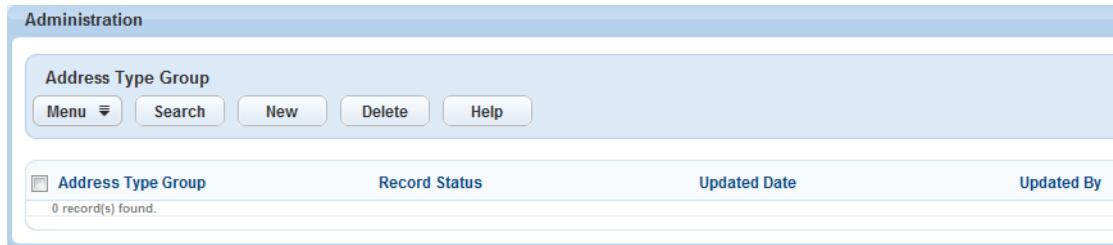


Accessing the Address Type Group Portlet

To access the Address Type Group portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Agency Profile > Address Type Group**.

Civic Platform displays the portlet.



Accessing the Console Configuration Portlet

To access the Console Configuration portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Agency Profile > Console Configuration**.

Civic Platform displays the portlet.

The screenshot shows the 'Administration' interface with the 'Console Configuration' portlet. At the top, there's a toolbar with 'Menu', 'Search', 'New', 'Delete', and 'Help' buttons. Below the toolbar is a navigation bar with arrows for navigating through pages. The main area contains a table with columns: 'Console Name', 'Console Description', 'Last Updated', and 'Updated By'. The table lists five entries:

Console Name	Console Description	Last Updated	Updated By
Asset Man...	template ...	01/03/2012	CARELSUPER
Service R...	template ...	01/03/2012	CARELSUPER
License a...	template ...	01/03/2012	CARELSUPER
Land Mana...	template ...	01/03/2012	CARELSUPER
000666.CA...	self cons...		

Below this is another section with a 'Console' tab selected. It includes fields for 'Console Name' (set to 'Asset Management'), 'Edit Console' (button), 'Console Description' (text area containing 'template console'), and 'Recipient' (button). There are also 'Save' and 'Reset' buttons at the top of this section.

Accessing the Content Customize Portlet

To access the Content Customize portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Agency Profile > Content Customize**.

Civic Platform displays the portlet.

The screenshot shows the 'Administration' interface with the 'Content Customize' portlet. At the top, there's a toolbar with 'Menu', 'Save', 'Reset', and 'Help' buttons. Below the toolbar is a 'Type' dropdown set to 'AA_EMAIL_INSPECTION_STATUS_CHANGE_CONTENT'. There's also a 'Brief Description' input field and a 'Content' rich text editor. The rich text editor has a toolbar with various icons for bold, italic, underline, etc., and a text area below it.

Accessing the Create New Objects Portlet

To access the Create New Objects portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).

2. Click Agency Profile > Create New Objects.

Civic Platform displays the portlet.

Objects	Display	Display Order
Application	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
Permit	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
Inspection	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
Invoice	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
Contact	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
Professionals	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
Asset	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
Task	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
Work Order	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
License	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
Service Request	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
Case\Incident\Citation	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
Set	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
Structures & Establishments	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]
Time Accounting	<input checked="" type="radio"/> Yes <input type="radio"/> No	[Input Field]

Accessing the Form Portlet Designer

To access the Form Portlet Designer

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).

2. Click Agency Profile > Form Portlet Designer.

Civic Platform displays the portlet.

The screenshot shows the 'Form Portlet Designer' portlet interface. At the top, there are buttons for New, Delete, Copy, and Help. Below these are tabs for Agency, Module, User Group, User, Personalization, and Dynamic Text. The Agency tab is selected. Under the Agency tab, there are dropdown menus for Portlet (Select Portlet), Agency (000666), Module (Select Module), Group (Select Group), and User (Select User). A 'Copy to' button is also present. Below these controls is a table with columns for Name, Agency, and Description. A message at the bottom left says '0 record(s) found.'

Accessing the Link Portlets Portlet

To access the Link Portlets portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).

2. Click Agency Profile > Link Portlets.

Civic Platform displays the portlet.

The screenshot shows the 'Link Portlets' section of the Civic Platform Administration interface. The top navigation bar says 'Administration'. Below it, there's a toolbar with 'Menu', 'Search', 'New', 'Delete', and 'Help' buttons. A table header row contains 'Name' and 'Portlet System Name'. A message below the table says '0 record(s) found.'

Accessing the Logo Portlet

To access the Logo portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Agency Profile > Logo**.

Civic Platform displays the portlet.

The screenshot shows the 'Logo' portlet page. The top navigation bar says 'Administration'. Below it, there's a toolbar with 'Menu', 'New', 'Delete', 'Download', and 'Help' buttons. A table header row contains 'Agency', 'Logo Type', 'Logo URL', 'File Name', and 'Description'. A message below the table says '0 record(s) found.'

Accessing Menu Navigation

To access the Menu Navigation portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Agency Profile > Menu Navigation**.

Civic Platform displays the portlet.

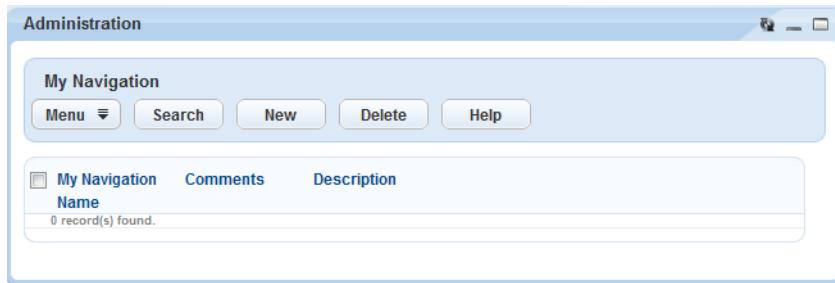
The screenshot shows the 'Menu Navigation' portlet page. The top navigation bar says 'Administration'. Below it, there's a toolbar with 'Refresh', 'Help', and 'Help' buttons. A message says 'Use the tree to define the menu for a specified portlet'. Below the message is a tree view showing four items under 'Portlet - Asset Data Management': 'Portlet - Record Form Portlet', 'Portlet - Ref Address Form Portlet', 'Portlet - Ref Parcel Form Portlet', and another 'Portlet - Asset Data Management' item.

Accessing the My Navigation Portlet

To access the My Navigation portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Agency Profile > My Navigation**.

Civic Platform displays the portlet.



Accessing the Portlets Portlet

To access the Portlets portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Agency Profile > Portlet**.

Civic Platform displays the portlet.

Portlet	Portlet URL	Portal Page ID	FID
Flow Diagram	/flowdiagram/flowDiagramShow.do	portal.flowdiagram.page	8888
QuickLinks	/quicklink/linksPortletList.do	portal.quicklink.page	8888
FAQ	/quicklink/linksPortletList.do	portal.faq.page	8888

Accessing the Regional Settings Portlet

To access the Regional Settings portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Agency Profile > Regional Settings**.

Civic Platform displays the portlet.

Default Country/Region	Country/Region	State/Province	Phone Number Country Code	Use ZIP Code
No	Canada	CA_PROVINCES	001	Yes
No	United Arab Emirates		971	No
Yes	United States	US_STATES	001	Yes

Regional Form

Country/Region *	Default Country/Region	State/Province
United States	<input checked="" type="checkbox"/>	US_STATES
Phone Number Country Code	Use ZIP Code	ZIP Code Mask
001	<input checked="" type="checkbox"/>	#####
Phone Number Mask	#### #### ####	

Accessing the Service Portlet

To access the Service portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Agency Profile > Service**.

Civic Platform displays the portlet.

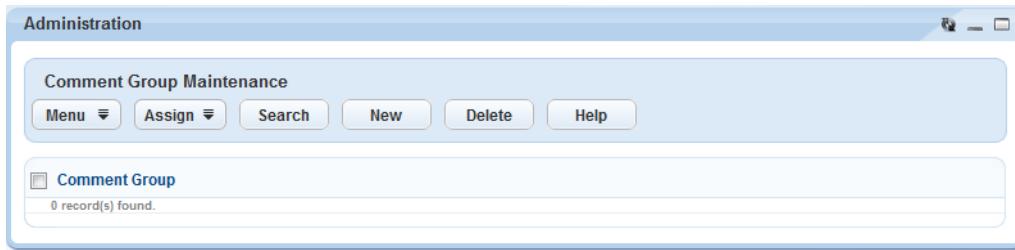
Service	Record Type	ASI Group	ASI Subgroup
0 record(s) found.			

Accessing the Comment Group Maintenance Portlet

To access the Comment Group Maintenance portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Agency Profile > Standard Comments**.

Civic Platform displays the portlet.



Accessing the Text Settings Portlet

To access the Text Settings portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Agency Profile > Text Settings**.

Civic Platform displays the portlet.

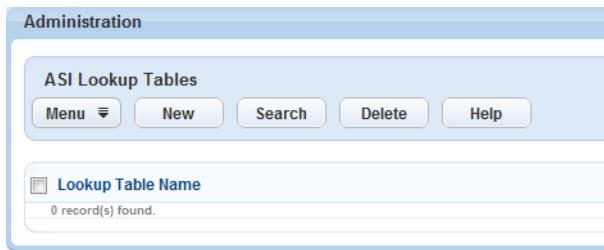
Display Text	Default Value	Category	Modified	Level	Country/Region	Language
Delete Condition	Delete Condition	Button - Script	No	SYSTEM	United States	English
Deleted page item successfully.	Deleted page item successfully.	Error - Script	No	SYSTEM	United States	English
{0} record(s) deleted successfully.	{0} record(s) deleted successfully.	Error - Text List	No	SYSTEM	United States	English
Action by User	Action by User	Portlet - Address Condition Edit_21051	No	SYSTEM	United States	English
Action by Dept	Action by Dept	Portlet - Address Condition Edit_21051	No	SYSTEM	United States	English

Accessing the Custom Fields Lookup Tables Portlet

To access the Custom Fields Lookup Tables portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Application > Custom Fields Lookup Tables**.

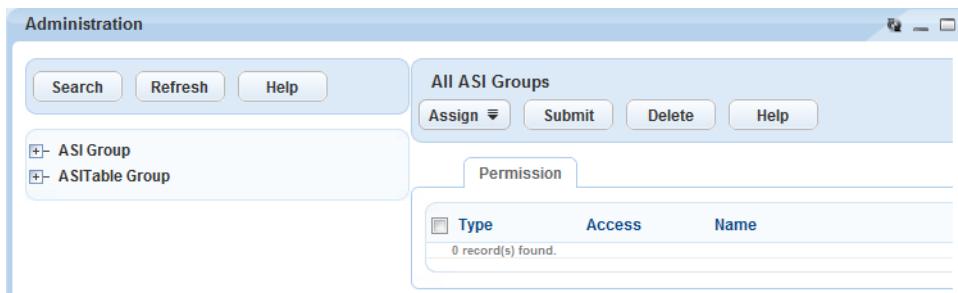
Civic Platform displays the portlet.



Accessing the Custom Fields Security Portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click Application > Custom Fields Security.

Civic Platform displays the portlet.

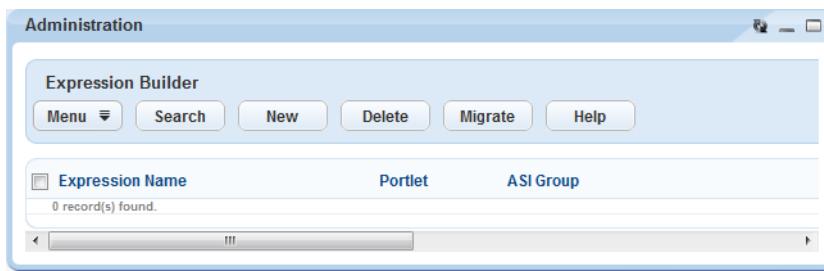


Accessing the Expression Builder Portlet

To access the Expression Builder portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click Application > Expression Builder.

Civic Platform displays the portlet.

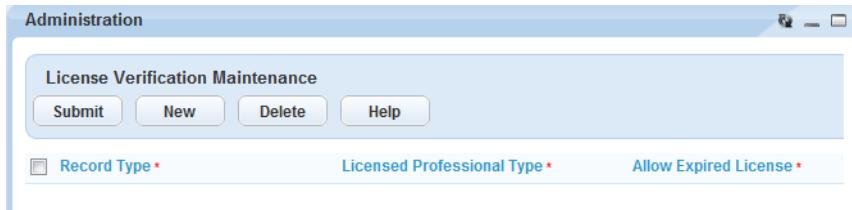


Accessing the License Verification Maintenance Portlet

To access the License Verification Maintenance portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click Application > License Verification.

Civic Platform displays the portlet.

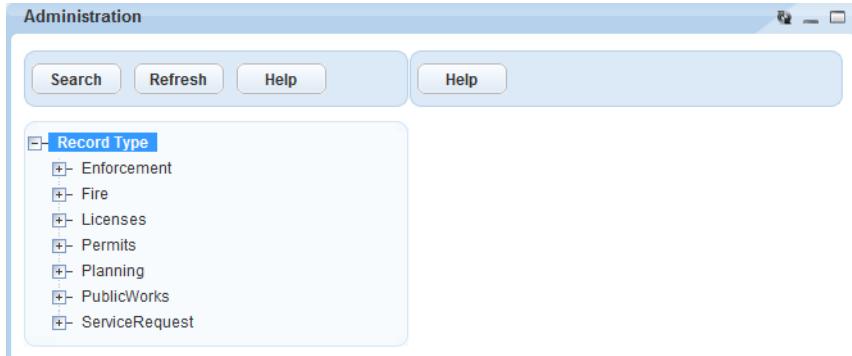


Accessing the Record Type Security Portlet

To access the Record Type Security portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Application > Record Type Security**.

Civic Platform displays the portlet.

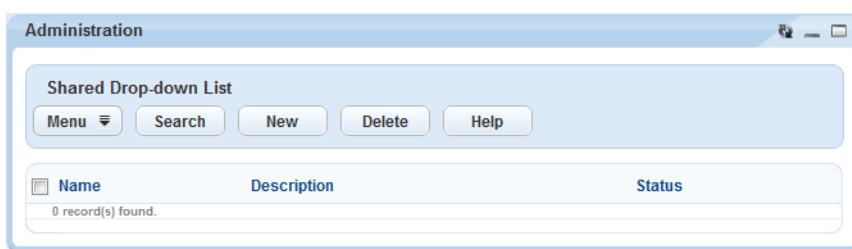


Accessing the Shared Drop-down List Portlet

To access the Shared Drop-down List portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Application > Shared Drop-Down List**.

Civic Platform displays the portlet.

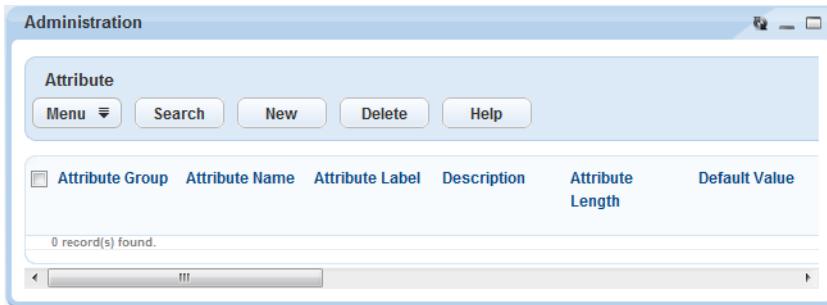


Accessing the Asset Attributes Portlet

To access the Assets Attribute portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Assets > Attribute**.

Civic Platform displays the portlet.

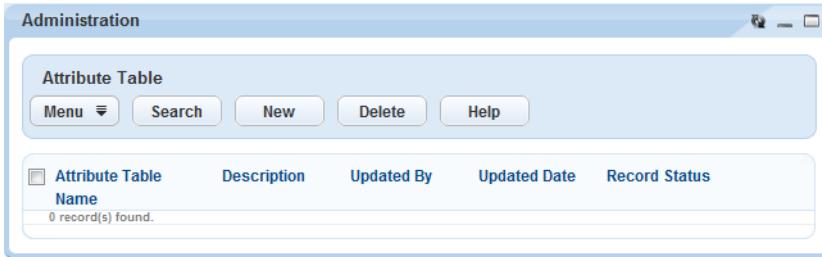


Accessing the Attribute Table Portlet

To access the Attribute Table portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Assets > Attribute Table**.

Civic Platform displays the portlet.

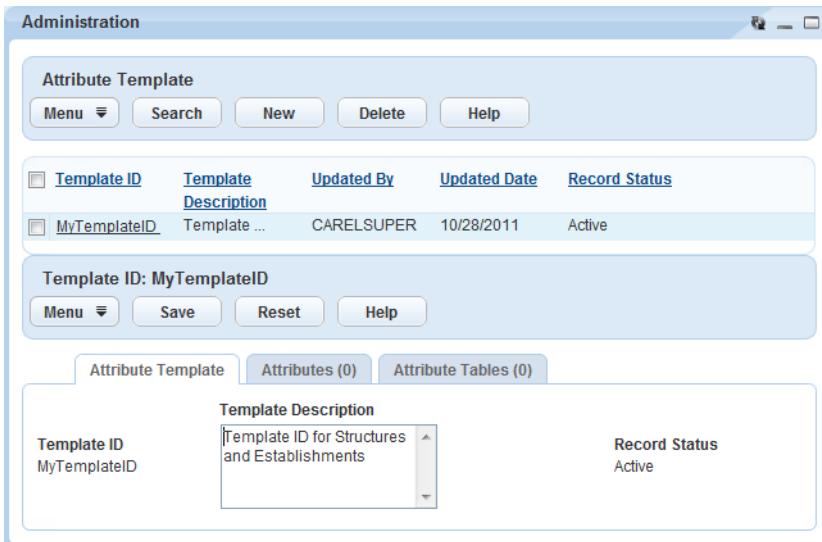


Accessing the Attribute Template Portlet

To access the Attribute Template portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Assets > Attribute Template**.

Civic Platform displays the portlet.

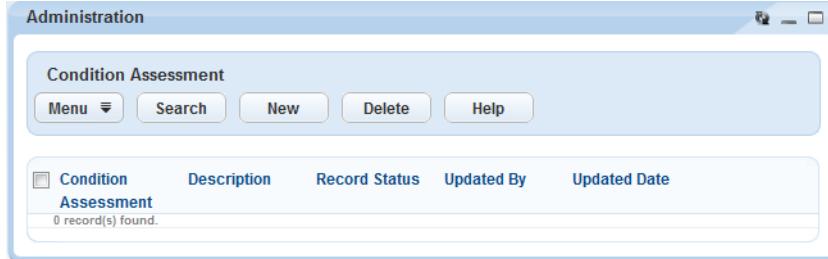


Accessing the Condition Assessment Portlet

To access the Condition Assessment portlet

1. Access the Setup portlet ([Accessing the Condition Assessment Portlet](#)).
2. Click **Assets > Condition Assessment**.

Civic Platform displays the portlet.

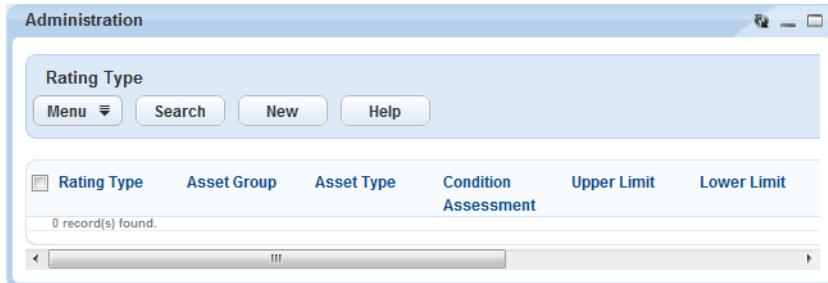


Accessing the Rating Type Portlet

To access the Rating Type portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Assets > Rating Type**.

Civic Platform displays the portlet.

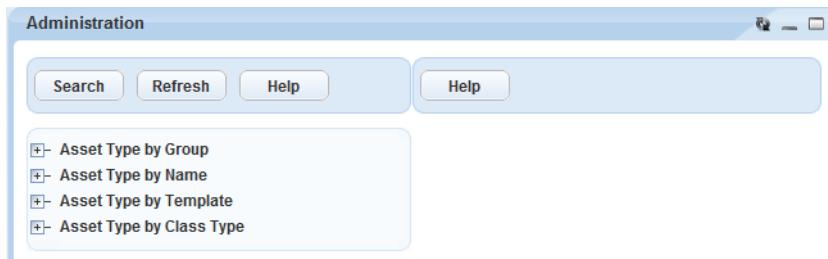


Accessing the Asset Security Portlet

To access the asset security administration portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Assets > Security**.

Civic Platform displays the portlet.



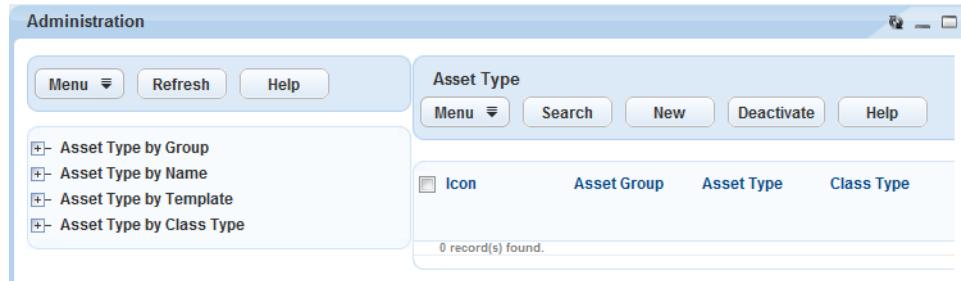
Accessing the Asset Type Administration Portlet

To access the Asset Type administration portlet

1. Access the Setup portlet ([Accessing the Asset Type Administration Portlet](#)).

2. Click **Assets > Type**.

Civic Platform displays the portlet.



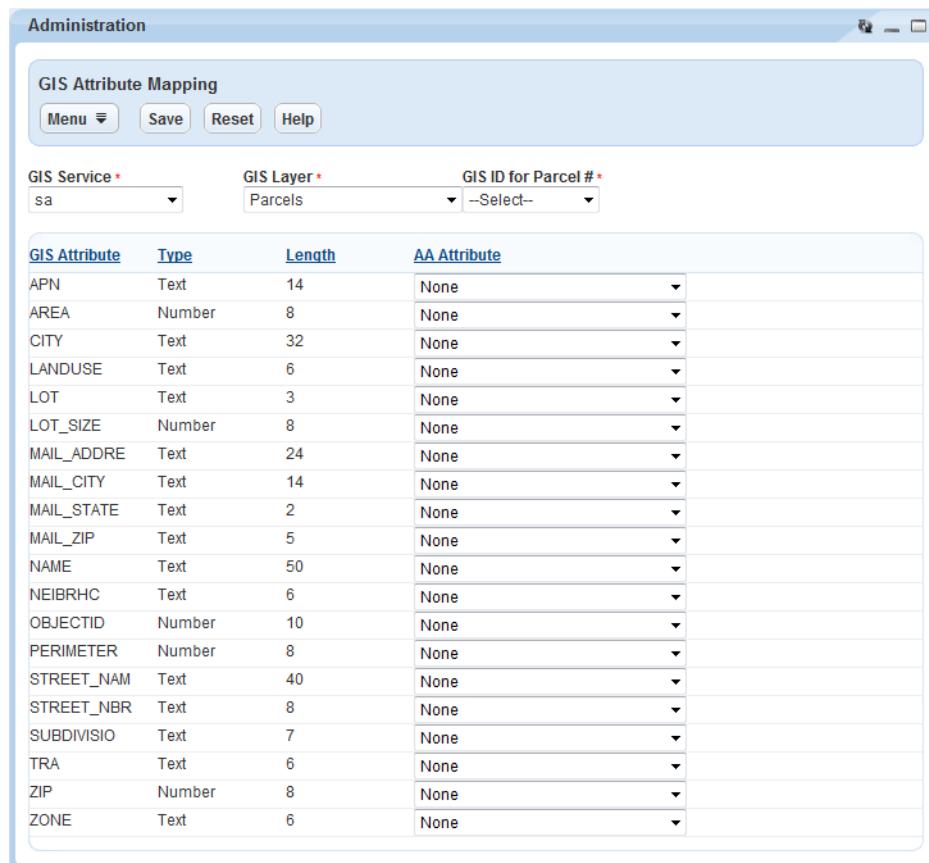
Accessing the GIS Attribute Mapping Portlet

To access the GIS Attribute Mapping portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).

2. Click **Parcels > GIS Attribute Mapping**.

Civic Platform displays the portlet.



Accessing the Calendar Administration Portlet

To access the calendar administration portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).

2. Click Calendars > Calendar.

Civic Platform displays the portlet.

Calendar Name	Type	Status
Jury duty	HEARING	Active
New Years	EVENT	Active

Accessing the Conditions Maintenance Portlet

To access the condition maintenance portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).

2. Click Conditions > Condition.

Civic Platform displays the portlet.

Condition Name	Short Notes	Condition Group	Condition Type	Display Notice
0 record(s) found.				

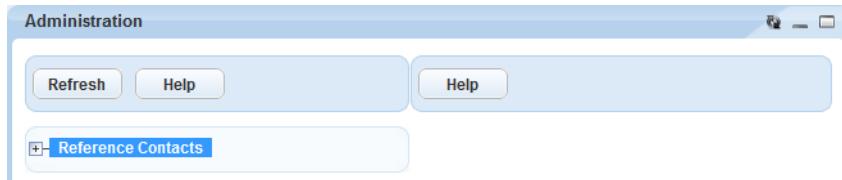
Accessing the Contact Type Setting Portlet

To access the contact type setting portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).

2. Click Contact > Contact Type Setting.

Civic Platform displays the portlet.

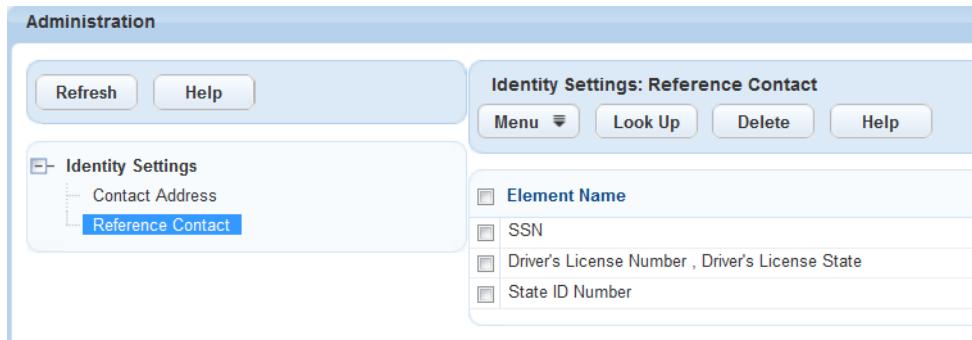


Accessing the Contact Identity Settings Portlet

To access the contact identity settings portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Contact > Identity Settings**.

Civic Platform displays the portlet.

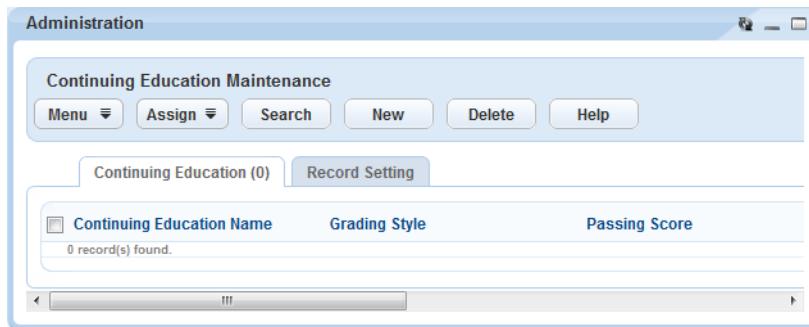


Accessing the Continuing Education Maintenance Portlet

To access the Continuing Education Maintenance portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **License Certifications > Continuing Education**.

Civic Platform displays the portlet.

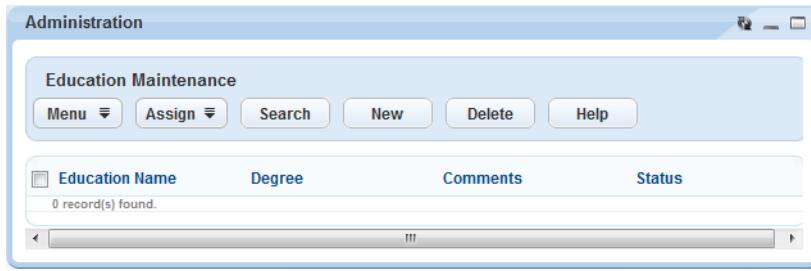


Accessing the Education Maintenance Portlet

To access the Education Maintenance portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **License Certifications > Education**.

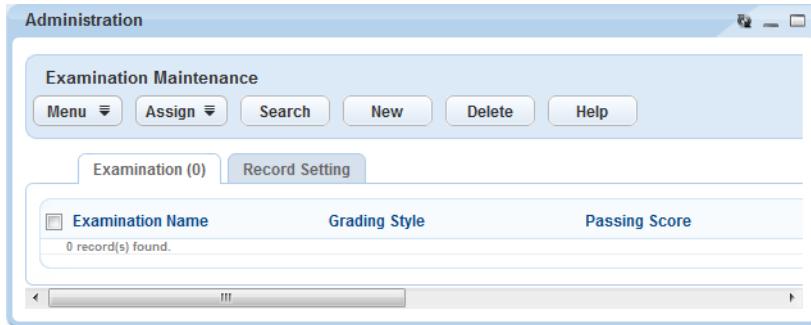
Civic Platform displays the portlet.



Accessing the Examination Maintenance Portlet

To access the Examination Maintenance portlet

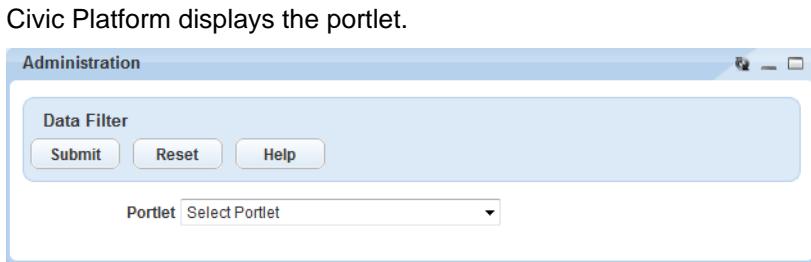
1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
 2. Click **License Certifications > Examination**.
- Civic Platform displays the portlet.



Accessing the Data Filter Portlet

To access the Data Filter portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Data Filter & Query > Data Filter**.



Accessing the Global QuickQueries Portlet

To access the Global QuickQueries portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
 2. Click **Data Filter & Query > Global QuickQueries**.
- Civic Platform displays the portlet.



Accessing the My QuickQueries Portlet

To access the My QuickQueries portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Data Filter & Query > My QuickQueries**.

Civic Platform displays the portlet.

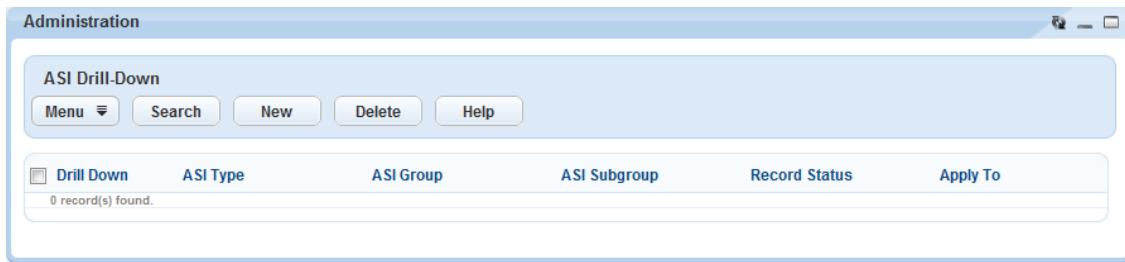


Accessing the Custom Fields Drill-Down Portlet

To access the Custom Fields Drill-Down portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Drill Down > Custom Fields Drill-Down**.

Civic Platform displays the portlet.



Accessing the Inspection Type Security Portlet

To access the inspection type security portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Inspection > Inspection Type Security**.

Civic Platform displays the portlet.

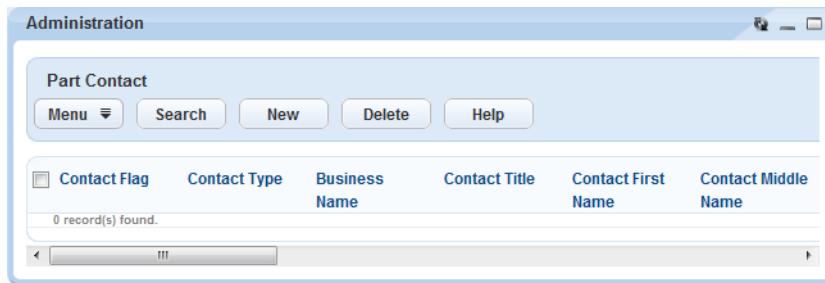


Accessing the Part Contact Portlet

To access the Part Contact portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Part > Part Contact**.

Civic Platform displays the portlet.

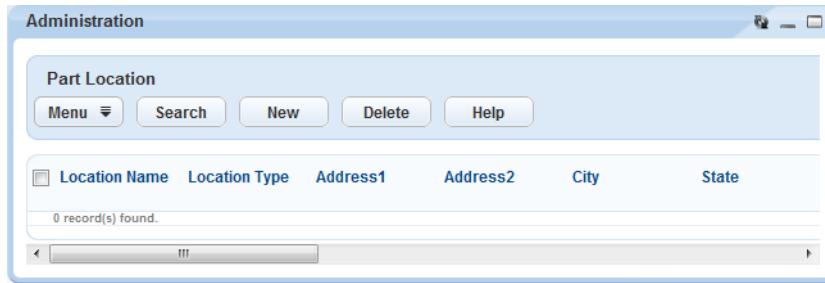


Accessing the Part Location Portlet

To access the Part Location portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Part > Part Location**.

Civic Platform displays the portlet.



Accessing the Report Manager Portlet

To access the report manager portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Report > Report Manager**.

Civic Platform displays the portlet.

The screenshot shows the 'Administration' interface with the 'Report Detail' tab selected. On the left, there's a sidebar with links like 'Reports by Category', 'Reports by Name', etc. The main form has fields for 'Name' (with a required asterisk), 'Category' (with a dropdown menu), 'Output Format' (set to 'Default Format'), 'Print Only' (set to 'No'), 'EDMS' (dropdown menu), and 'Report Link' (text input). There are also sections for 'Send to Printer', 'Save to EDMS', 'Include on Report Portlet', 'Process Service', 'Description', 'Send in e-mail' (checkbox), and 'Authentication Method' (dropdown menu). A note at the bottom says 'All set member Records' contacts'.

Accessing the SmartChart Queries Portlet

To access the SmartChart Queries portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
 2. Click **Report > SmartChart Queries**.
- Civic Platform displays the portlet.

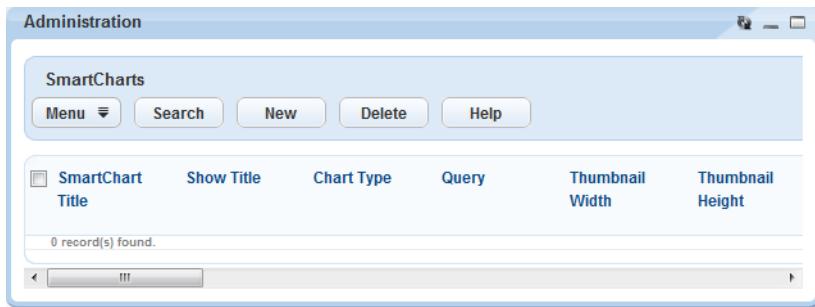
The screenshot shows the 'Administration' interface with the 'SmartChart Queries' portlet selected. It has buttons for 'Menu', 'Search', 'New', 'Delete', and 'Help'. Below is a table with one row:

Query	Query SQL
Name	0 record(s) found.

Accessing the SmartChart Portlet

To access the SmartChart portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
 2. Click **Report > SmartCharts**.
- Civic Platform displays the portlet.

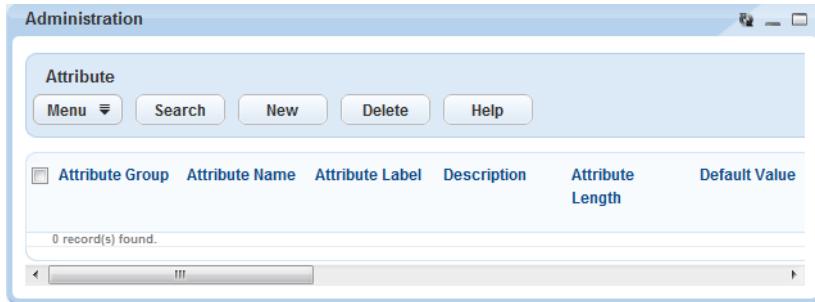


Accessing the Structures and Establishments Attribute Portlet

To access the Structures and Establishments Attribute portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Structures and Establishments > Attribute**.

Civic Platform displays the portlet.

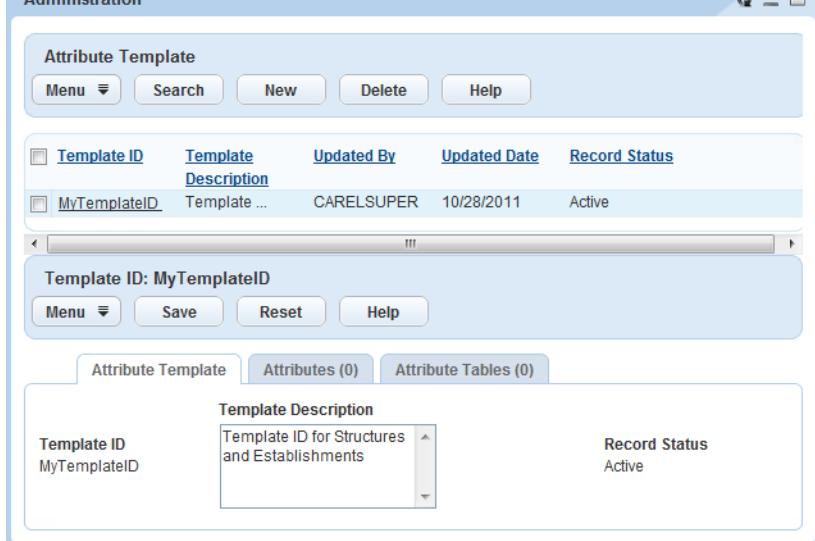


Accessing the Structures and Establishments Attribute Template Portlet

To access the structures and establishments Attribute Template portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Structures and Establishments > Attribute Template**.

Civic Platform displays the portlet.



Accessing the Structures and Establishments Types Portlet

To access the Structures & Establishment Types portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Structures and Establishments > Type**.

Civic Platform displays the portlet.

Category	Type	Template ID	Description	Last Updated	Updated By	Record Status
STRUCTURE	MyStructureType	MyTemplateID		10/28/2011	CARELSUPER	A

Accessing the Alert Portlet

To access the Alert portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Communication Manager > Alert**.

Civic Platform displays the portlet.

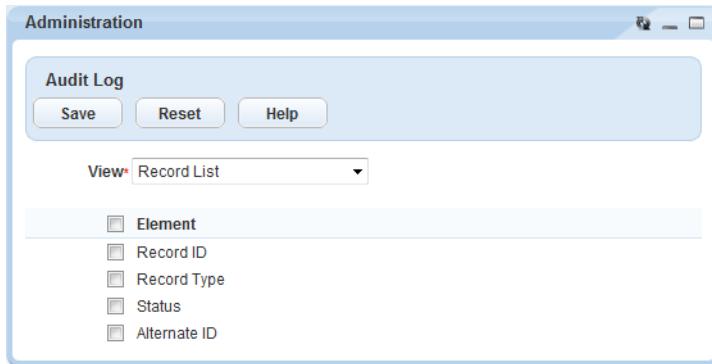
Message	Type	Duration	Duration Unit	Alert ID
0 record(s) found.				

Accessing the Audit Log Portlet

To access the Audit Log portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **System Tools > Audit Log**.

Civic Platform displays the portlet.

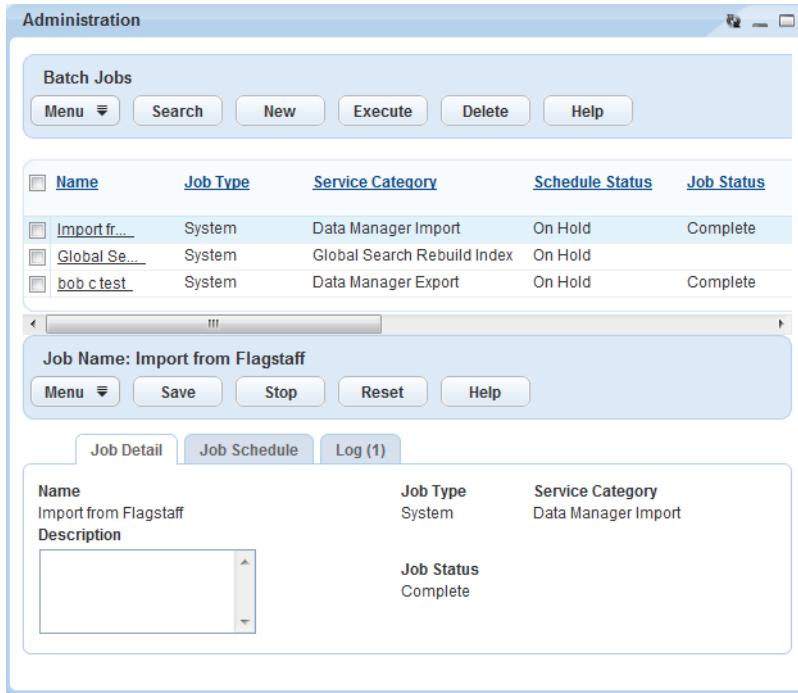


Accessing the Batch Jobs Portlet

To access the Batch Jobs portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **System Tools > Batch Engine**.

Civic Platform displays the portlet.

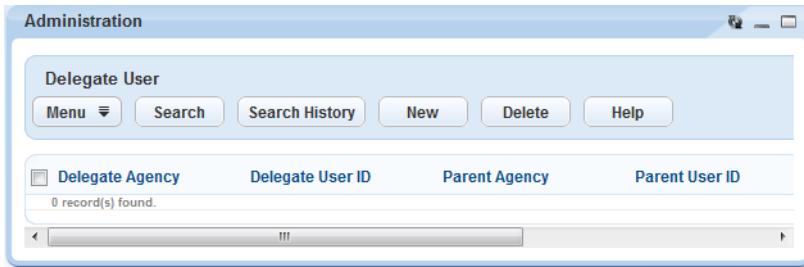


Accessing the Delegate User Portlet

To access the Delegate User portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **System Tools > Delegate User**.

Civic Platform displays the portlet.

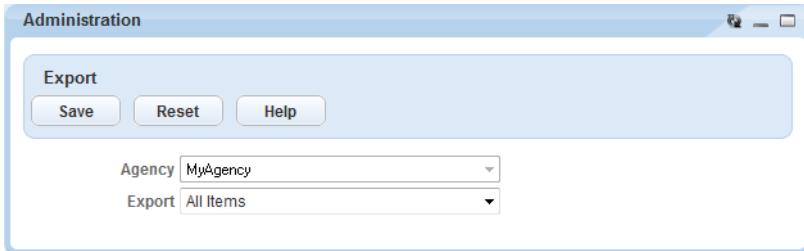


Accessing the Export Portlet

To access the Export

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **System Tools > Export**.

Civic Platform displays the portlet.



Accessing the legacy Accela GIS Integration Diagnostics Portlet

To access the legacy Accela GIS Integration Diagnostics portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **System Tools > GIS Integration Diagnostics**.

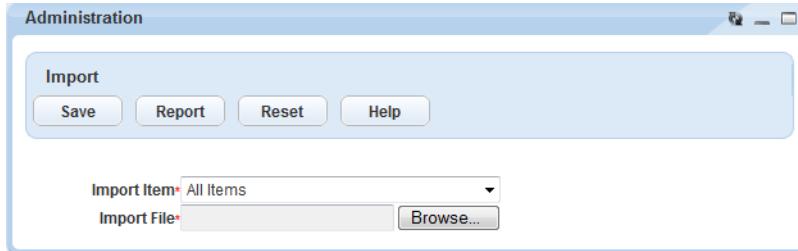
Civic Platform displays the portlet.

Accessing the Import Portlet

To access the Import portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **System Tools > Import**.

Civic Platform displays the portlet.

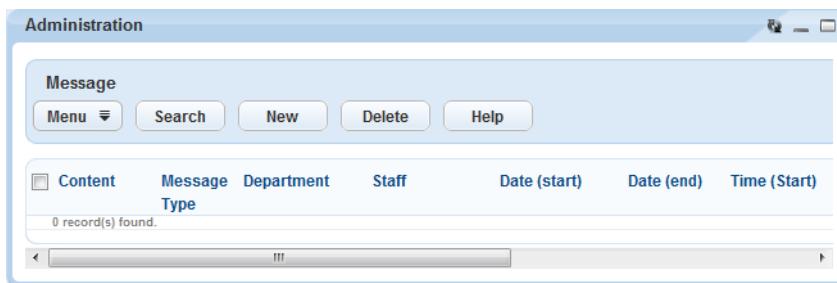


Accessing the Announcement Portlet

To access the Announcement portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Communication Manager > Announcement**.

Civic Platform displays the portlet.

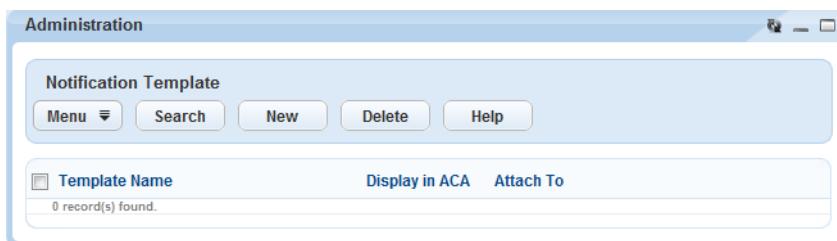


Accessing the Notification Template Portlet

To access the Notification Template portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Communication Manager > Notification Templates**.

Civic Platform displays the portlet.



Accessing the License Details Portlet

To access the License Details portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).

2. Click **System Tools > Product License**.

Civic Platform displays the portlet.

The screenshot shows the 'Administration' window with the title 'License Details'. Below the title are two buttons: 'Import' and 'Help'. The main area displays two sets of license information for different solutions:

Solution Name	Asset Management
Named Users(Total Available Licenses)	Unlimited
Licenses in Use	7
Licenses Available	Unlimited
Expiration Date	Unlimited
Status	Enabled

Solution Name	Land Management
Named Users(Total Available Licenses)	Unlimited
Licenses in Use	2
Licenses Available	Unlimited
Expiration Date	Unlimited
Status	Enabled

Accessing the Public User Portlet

To access the Public User portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).

2. Click **System Tools > Public User**.

Civic Platform displays the portlet.

The screenshot shows the Civic Platform Administration interface with the title "Administration" and the sub-title "PublicUser". The top navigation bar includes "Menu", "New", "Search", and "Help". Below the navigation is a toolbar with arrows for navigating through records. The main area contains two tables for listing and editing user information. The first table has columns for "E-mail", "First Name", "Middle Name", "Last Name", "Business Name", "State", "City", "Address", and "Zip". The second table also has columns for "First Name", "Middle Name", "Last Name", "Business Name", "State", "City", "Address", and "Zip". Below these tables is a form for creating or updating a user record. The form fields include:

- First Name ***: Text input field.
- Middle Name**: Text input field.
- Last Name ***: Text input field.
- Business Name**: Text input field.
- State**: Text input field.
- City**: Text input field.
- Address ***: Text input field.
- Zip**: Text input field.
- Home Phone**: Text input field.
- Cell Phone**: Text input field.
- Fax**: Text input field.
- E-mail ***: Text input field.
- Preferred Contact Channel**: A dropdown menu with options including "Email", "Phone", "Fax", "SMS", and "Social Media".
- Password ***: Text input field with a "Password Strength" indicator bar below it.
- Confirm Password ***: Text input field.
- User ID ***: Text input field.
- Password request question ***: Text input field.
- Password request answer ***: Text input field.
- User Role**: A dropdown menu with options including "Admin User", "Standard User", and "Guest User".
- FEIN**: Text input field.
- Receive SMS Message**: A checkbox.
- Change Password at Login**: A checkbox with options "Yes" (selected) and "No".
- Country/Region**: A dropdown menu with options including "United States", "Canada", and "Other".
- SSN**: Text input field.

Accessing the Receipt Print Audit Portlet

To access the Receipt Print Audit portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Finance > Receipt Print Audit**.

Civic Platform displays the portlet.

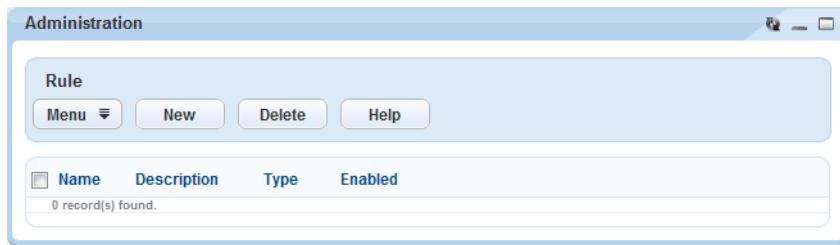
The screenshot shows the Civic Platform Administration interface with the title "Administration" and the sub-title "Receipt Print Audit". The top navigation bar includes "Menu", "Search", and "Help". Below the navigation is a toolbar with arrows for navigating through records. The main area contains a table with columns for "Receipt Type", "Receipt #", "Printed By", and "Printed Date". A message at the bottom of the table area states "0 record(s) found."

Accessing the Alert Rule Portlet

To access the Alert Rule portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Communication Manager > Alert Rule**.

Civic Platform displays the portlet.



Accessing the Sequence Definition Portlet

To access the Sequence Definition Portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **System Tools > Sequence Generator**.

Civic Platform displays the portlet.

Name*	Cache Size*	Interval Type
<input type="text"/>	1	Calendar Year
Sequence Type*	Start Value *	Increment By *
-Select-	1	1
Reset Value *	Reset Action	Status
<input type="text"/>	Exception	Enabled
Description		

Accessing the Occupancy Administration Portlet

To access the Occupancy Administration portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Valuation Calculator > Occupancy**.

Civic Platform displays the portlet.

Occupancy Maintenance:

Occupancy	Type of Work	Version	Unit	Unit Cost
853	367	467	594	0.1
\$FI00001\$	\$FI00001\$	1.0	\$	85
Dwelling...	Light install...	2001	RMB	10
Dwelling...	Light install...	trt	RMB	10
Dwelling...	Light install...	2007	RMB	10

Occupancy: 853

Occupancy *	Type of Work *
853	367
Version *	Unit *
467	594
Unit Cost	Fee Indicator
0.1	429
Effective Date *	Disabled on Date
12/14/2011	12/15/2011
Status	<input type="checkbox"/> Exclude from Regional Modifier
Enabled	

Accessing the Activity Specific Info Portlet

To access the Activity Specific Info portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Workflow & Activity > Activity Specific Info**.

Civic Platform displays the portlet.

Activity Specific Info

Menu Search New Delete Help

Activity Specific Info Subgroups

Group Code
0 record(s) found.

Accessing the Activity Type Portlet

To access the Activity Type portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Workflow & Activity > Activity Type**.

Civic Platform displays the portlet.

Accessing the Assign Task Portlet

To access the Assign Task portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Workflow & Activity > Assign Task**.

Civic Platform displays the portlet.

Accessing the Skillset Portlet

To access the Skillset portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Workflow & Activity > Skillset**.

Civic Platform displays the portlet.

Accessing the Workflow Security Portlet

To access the workflow security portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Workflow & Activity > Workflow Security**.

Civic Platform displays the portlet.

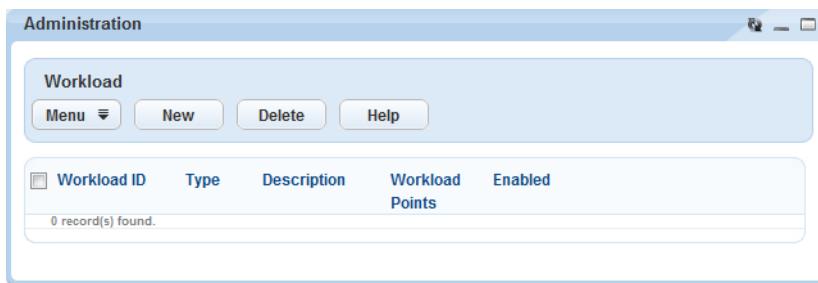


Accessing the Workload Portlet

To access the Workload portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Workflow & Activity > Workload**.

Civic Platform displays the portlet.

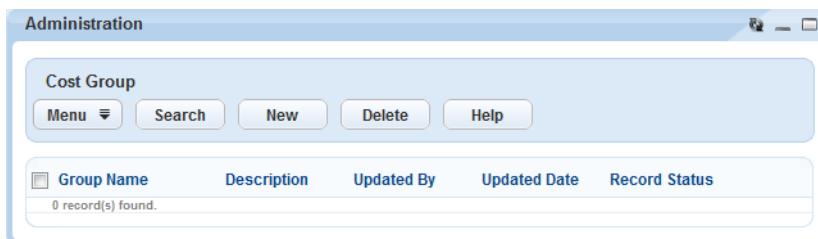


Accessing the Cost Group Portlet

To access the Cost Group portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Work Orders > Cost Group**.

Civic Platform displays the portlet.

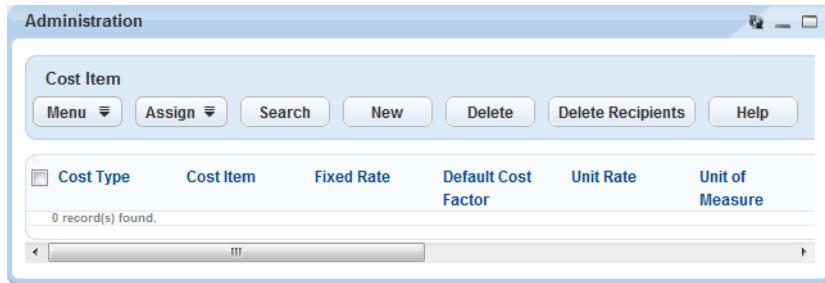


Accessing the Cost Item Portlet

To access the Cost Item portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Work Orders > Cost Item**.

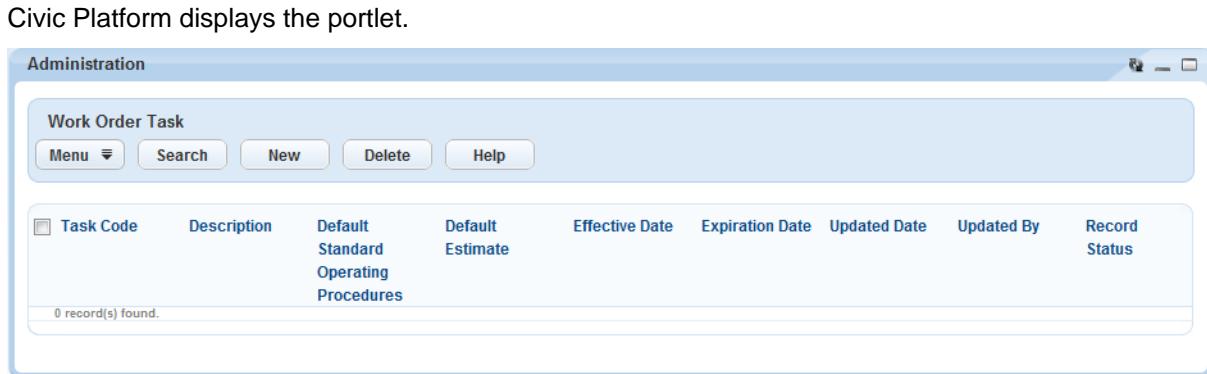
Civic Platform displays the portlet.



Accessing the Work Order Task Portlet

To access the Work Order Task portlet

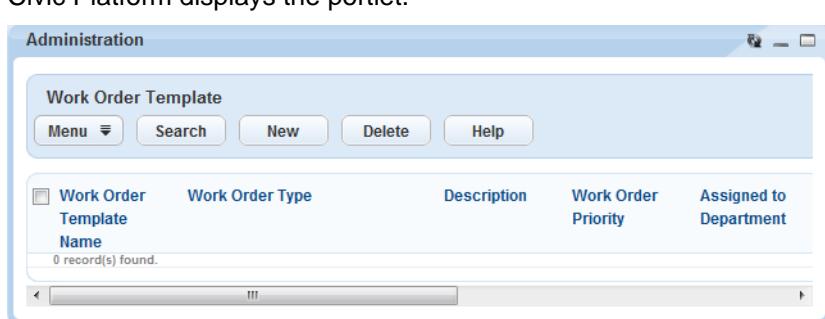
1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Work Orders > Work Order Task**.



Accessing the Work Order Template Portlet

To access the Work Order Template portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Work Orders > Work Order Template**.

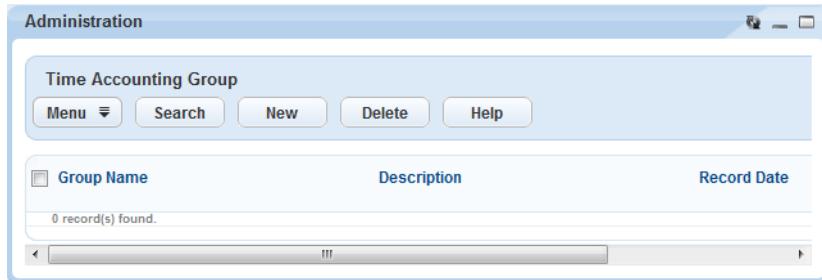


Accessing the Time Accounting Group Portlet

To access the Time Accounting Group portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Time Accounting > Group**.

Civic Platform displays the portlet.

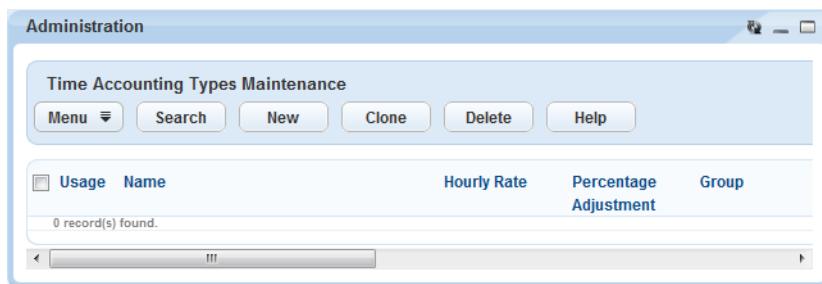


Accessing the Time Accounting Types Maintenance Portlet

To access the Time Accounting Types Maintenance portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Time Accounting > Type Maintenance**.

Civic Platform displays the portlet.



Accessing the Time Accounting Profiles Portlet

To access the Time Accounting Profiles portlet

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Click **Time Accounting > User Profiles**.

Civic Platform displays the portlet.

Administration

User Time Accounting Profiles

User Name	Login ID	User Status	Profile
ADMIN	Enabled	Active	Active

Time Accounting Profile: ADMIN (New Profile)

User Name	User Login ID	May Enter Time Accounting
ADMIN	ADMIN	No
Time Accounting Group *	All Time Accounting Types	Active
ALL Groups	All Time Accounting Types	No
Number of Days That Delete is Allowed *	999	Record By
999	999	CARELSUPER
Hourly Rate *	0.00	May Enter Start/End/Elapsed Time
0.00	May Modify the Logged Date	Yes
May Modifiable Billable Flag	Hidden	May Enter Materials And Cost
No	May Modify Rates and Cost	Hidden
May See Other User's Time Accounting	Hidden	May Modify Other User's Time Accounting
No	User as Resource	No
May Delete Other User's Time Accounting		May Lock Other User's Time Accounting
No		No

Accessing the Building Permits Portlet

To access the Building Permits portlet

1. Create a main link for the Building Permits portlet ([Setting Up Your Console and Home Page](#)).
2. Click the main link for the Building Permits portlet.

Civic Platform displays the portlet

Building Permits

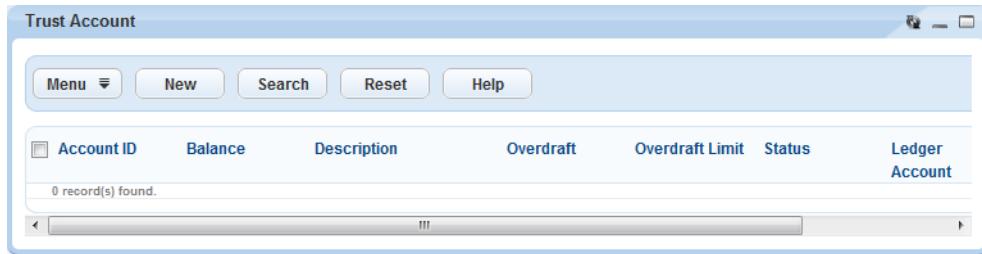
Record ID	Short Notes	Record Type	Status	Opened Date	Priority	Street Name	First Name
0 record(s) found.							

Accessing the Trust Account Portlet

To access the Trust Account portlet

1. Create a main link for the Trust Account portlet ([Setting Up Your Console and Home Page](#)).
2. Click the main link for the Trust Account portlet.

Civic Platform displays the portlet



Accessing the Addresses, Parcels, or Owners Portlets

To access the Addresses portlet, the Parcels portlet, or the Owners portlet

1. Create a main link for the Addresses portlet, the Parcels portlet, or the Owners portlet ([Setting Up Your Console and Home Page](#)).
2. Click the main link you created in .

Civic Platform displays the Addresses portlet, the Parcels portlet, or the Owners portlet. The Addresses portlet is illustrated in this example.

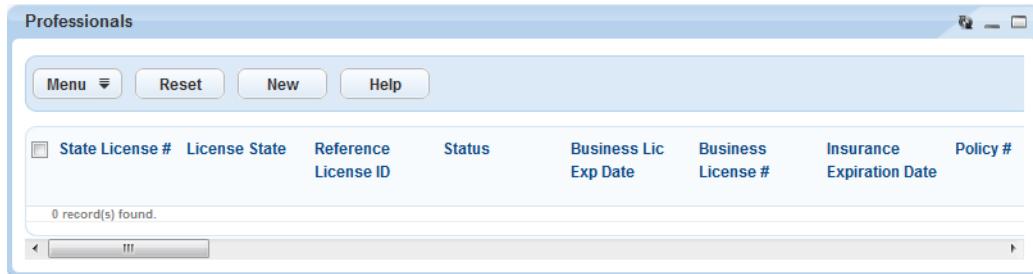
The screenshot shows a window titled "Addresses". At the top is a menu bar with "Menu", "Submit", "Reset", "Cancel", and "Help" buttons. The form contains numerous input fields and dropdown menus for address search parameters:

- Street # (start), Unit # (start), State, Street # (end), County, Reference Address ID, End Fraction, Description, Secondary Road Number, Neighborhood Prefix, Y Coordinate, Audit Date, Primary (dropdown: All, Lot, Dropdown), Subdivision.
- Direction, Unit Type, Zip Code, Street Type, Country/Region, Source Number, Address Type Flag, Distance, Inspection District Prefix, Neighborhood, Event ID, Source Flag.
- Street Name, City, Prefix, Unit # (end), Audit Status (All), Start Fraction, Street Suffix (Direction), Secondary Road, Inspection District, X Coordinate, Audit ID, Street Address, Address Type (dropdown: --Select--).

Accessing the Professionals Portlet

To access the Professionals portlet

1. Add a main link for the Professionals portlet ([Setting Up Your Console and Home Page](#)).
 2. Click the main link for the Professionals portlet.
- Civic Platform displays the portlet



Classic and V360 Portlets

Table 1: Civic Platform Portlets

Portlet Name	Description
Classic Administration	The original administration page released in version 1 of the product
Accela Ad hoc Report	V360 Ad hoc Report Portlet
Accela Custom Portlet	Accela Custom Portlet
Accela Custom Reports	Accela Custom Reports
Accela News	Accela News
Activities	V360 Activities Portlet
Addresses	V360 Addresses Portlet
Administration	V360 Administration Portlet
Alerts	V360 Alerts Portlet
ARW Reports	Accela Report Writer Portlet
Asset Condition Assessment	Asset Condition Assessment Portlet
Assets	V360 Asset Management Portlet
Assets Common Component	Provides access to assets across all solutions; not limited to Asset Management solution. Available in Land Management, Licensing and Case Management, and Service Request solutions.
Batch Jobs	V360 Batch Jobs Portlet
Building Permits	V360 Building Permits Portlet
Bulletin Board	V360 Bulletin Board Portlet
Calendar	V360 User Calendar Portlet
Call Center News	News In Queue: Call Center News from ReaderBoards.com
Cases	V360 Cases Portlet
Cashier Session	V360 Cashier Session Portlet
Citizen User Organization	Citizen User Organization
Citizen User Profile	Citizen User Profile
Classic System Permits	V360 Classic System Permits Portlet

Portlet Name	Description
CNET News	CNET News
Communication Manager	Communication Manager Portlet
Contacts	V360 Contacts Portlet
Credit Card/Check Transactions	Credit Card/Check Transactions Portlet
Development	V360 Development Portlet
Enforce	V360 Enforce Portlet
Enforcement	V360 Enforcement Portlet
ESPN News	ESPN Sports Headlines
Establish Genealogy	V360 Establish Genealogy Portlet
eWeek News	eWeek - News
FAQ	V360 FAQ Portlet (1)
FAQ	V360 FAQ Portlet (2)
FAQ	V360 FAQ Portlet
Fire	V360 Fire Portlet
Flow Diagram	V360 Permit Flow Diagram Portlet
Flow Diagram	V360 Service Request Flow Diagram Portlet
GIS	GIS
Health	V360 Health Portlet
Inspection Route Sheet	Inspection Route Sheet Portlet
Inspections	V360 Inspections Portlet
IntelliScript	V360 IntelliScript Portlet
Invoices	V360 Invoice Portlet
Jetspeed	Jetspeed is a multi-device portal system with simple syndication capabilities
Kiva Classic	V360 Kiva Classic Portlet
Licenses	V360 Licenses Portlet
Model Maintenance	V360 Model Maintenance Portlet
My Navigation	V360 My Building Navigation Portlet
My Navigation	V360 My Enforcement Navigation Portlet
My Navigation	V360 My Fire Navigation Portlet
My Navigation	V360 My Health Navigation Portlet
My Navigation	V360 My Planning Navigation Portlet
My Navigation	V360 My Service Request Navigation Portlet
My Navigation	V360 My Work Orders Navigation Portlet
My Navigation	V360 My Navigation Portlet
My Permits	V360 My Building Permits Portlet
My Tasks	V360 My Tasks Portlet
New Flow Diagram	V360 Building Flow Diagram Portlet
News	Yahoo! News Top Stories

Portlet Name	Description
NLC Calendar	National League of Cities Calendar
NY Times Opinion	New York Times Opinion Page
Organization	Organization
Outlook Calendar	Outlook Calendar Portlet
Outlook Inbox	Outlook Inbox Portlet
Owners	V360 Owners Portlet
Parcels	V360 Parcels Portlet
Part Inventory	Part Inventory Portlet
Payment Processing	V360 Payment Processing Portlet
PCMag Reviews	PC Magazine Product Reviews
Permits	V360 Permits Portlet
Planning	V360 Planning Portlet
PM Schedules	PM Schedule Portlet
Point of Sale	Point of Sale
Political News	Yahoo! Political News
Preference	V360 Preference Management Portlet
Professionals	V360 Professionals Portlet
Public Building Permits	V360 Public Building Permits Portlet
Public Service Requests	V360 Public Service Requests Portlet
Public Works	V360 Public Works Portlet
PublicUser	PublicUser
Quicklinks	V360 Quicklinks Portlets (20)
Record	V360 General Record Portlet
Report Manager	V360 Report Manager Portlet
Reports	V360 Reports Portlet (5)
Service Requests	V360 Service Requests Portlet
Set Classic	V360 Set Classic Portlet
Set	V360 Set Portlet
Setup	V360 Setup Portlet
SmartCharts 2.0	V360 SmartCharts 2.0 Portlet
SmartCharts	V360 Narrow SmartCharts Portlet
SmartCharts	V360 Wide SmartCharts Portlet
Structures & Establishments	V360 Structures & Establishments Portlet
Task Management	V360 Task Management Portlet
Tech News	Yahoo! News Technology
Time Accounting	V360 Time Accounting Portlet
Trust Account	Trust Account
Turbine	Turbine is a java web application development framework
US News	Yahoo! News Top US Stories

Portlet Name	Description
User Info	V360 User Info Portlet
Weather	Current weather conditions for a city
Work Orders	V360 Work Orders Portlet

Part 1: Configuring the User View

Civic Platform provides functions to customize the user interface.

Related Information

- [Transitioning to the New User Interface](#)
- [Branding Civic Platform for Your Agency](#)
- [Setting Up Your Console and Home Page](#)
- [Customizing Menus, Tabs, and Drop-down Lists](#)
- [Creating Custom Portlets](#)
- [Filtering the Display of Data](#)
- [Designing Forms for Portlets](#)

Transitioning to the New User Interface

Civic Platform 8.0 introduced a facelift to streamline the user interface and enhance the user experience. The following topics describe how to transition from the legacy V360 UI to the new UI:

- [Setting the Civic Platform User Interface](#)
- [Configuring Page Links on the Launchpad](#)
- [Optimizing Form Designs](#)
- [Configuring the Record Detail Menu](#)
- [Utilizing the Task Dashboard](#)

The "Getting to Know the New User Interface" chapter in the *Civic Platform User's Guide* is an essential resource for users when transitioning to the new UI. It provides detailed how-to information, plus tips and techniques to help users quickly adapt to the new look and feel. To enhance user satisfaction and decrease support calls, consider sending your users a copy of "Getting to Know the New User Interface" when you make the switch to the new UI.

Setting the Civic Platform User Interface

You can choose whether your agency users see the legacy V360 UI or the new UI by default. You can also set the user interface by module so that some departments can be migrated to the new HTML user interface while disabling the choice to move back to the V360 user interface. The implementation of this feature uses the Standard Choice **ENABLE_80_UI**.

To set the Civic Platform user interface:

1. Go to the Classic Administration page. ([Accessing Classic Administration](#)).
2. Navigate to **Agency Profile > Standard Choices**.
3. Configure the Standard Choice **ENABLE_80_UI**, and set the Standard Choice Value and Value Description using the following guidelines:

Standard Choice Value	Value Description	Description
YES		Sets the new HTML user interface as the default UI for all users, and enables the Switch UI link to allow users to switch between the HTML and V360 user interfaces.
NO		Sets the legacy V360 user interface as the default UI for all users, and does not allow users to switch between the HTML and V360 user interfaces.
YES_V360	<module1>, <module2>, <moduleN> Example: Building, Licensing	Sets the legacy V360 user interface as the UI for users in the specified modules. Users belonging to the listed module(s) can only switch to the new UI if the same module is also listed in the YES_HTML value description.

Standard Choice Value	Value Description	Description
YES_HTML	<module1>, <module2>, <moduleN> Example: Building, Planning	Sets the latest HTML user interface as the UI for users in the specified modules. Users belonging to the listed module(s) can only switch to the legacy V360 UI if the same module is also listed in the YES_V360 value description.



Note: Users who do not belong to any of the listed modules for YES_V360 and YES_HTML will only see the legacy V360 UI. The YES_V360 and YES_HTML settings override the YES setting. That is, if you configure all YES, YES_V360, and YES_HTML values, the YES setting will be ignored.

UI Switch Configuration Scenario

Let's assume your agency has the following requirements:

- Planning Department (Planning Module) can only view V360 user interface.
- Building Department (Building Module) can only view the New UI.
- License Department (License Module) can switch between V360 user interface and the New UI.

The users and their default modules may be as follows.

- Sue has permission to access Planning and Building Modules, her default module is Planning.
- Mary has permission to access Building and Licensing Modules, her default module is Building.
- Bob has permission to access Licensing Module, his default module is Licensing.
- Fred is in the Code Enforcement Department, default module is Code Enforcement.

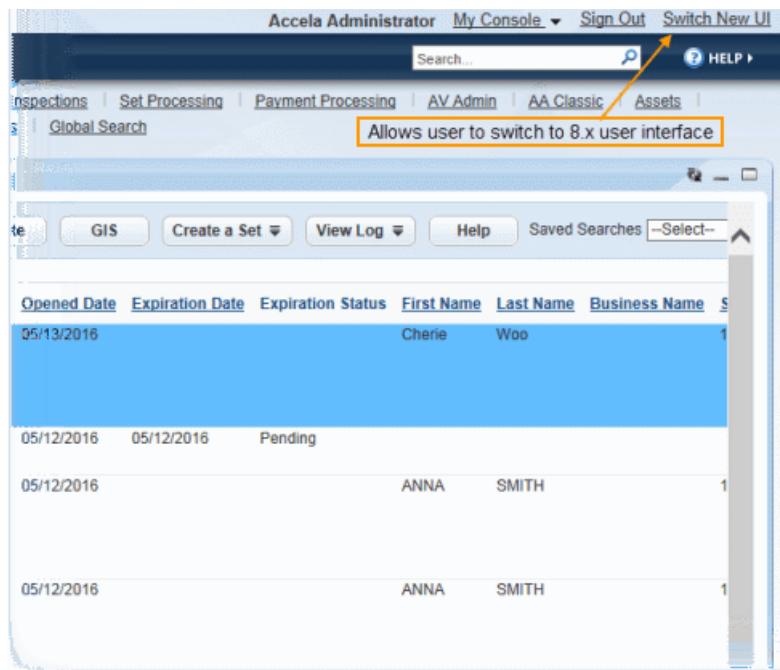
Therefore, the Standard Choice setting for ENABLE_80_UI would be as follows.

Standard Choice Value	Value Description
YES_V360	Planning, License
YES_HTML	Building, License

If a user's default module is not explicitly listed in the YES_V360 and YES_HTML standard choice values, then by default it will be the V360 UI only. As the above settings indicate, Fred would access the V360 UI only.

The Civic Platform back-office UI switch

If a user has permissions to switch UI (via ENABLE_80_UI configuration), the user can switch from the legacy V360 UI to the new UI using the **Switch New UI** link at the top right corner of the V360 UI, as shown below.



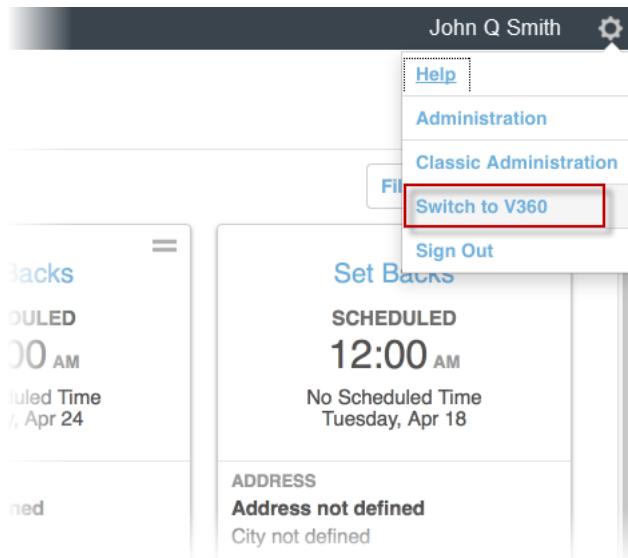
When a user clicks the **Switch New UI** link, Civic Platform switches from the V360 UI to the new UI:

A screenshot of the Civic Platform Tasks page. The top navigation bar shows 'PETALUMA | Civic Platform' and a user profile 'John Q Smith'. The main area is titled 'Tasks' and shows 'Showing 6 task(s)'. There are six tasks listed in a grid:

- PreMeeting**: SCHEDULED at 7:00 AM on Thursday, Aug 18. Details: Planning Commission Room, No meeting body assigned.
- Initial Investigation**: SCHEDULED at 12:00 AM on Thursday, Jul 28. Details: ADDRESS 500 PALM, AV UNINCORPORATED AREA CA 94505, GROUP ENF_GEN.
- Building Final**: SCHEDULED at 12:00 AM on Wednesday, Apr 13. Details: ADDRESS 2 E WASHINGTON ST, PETALUMA CA 94952, GROUP BLD_COMM.
- Gas Disconnect**: SCHEDULED at 12:00 AM on Monday, Apr 11. Details: ADDRESS 2 FULLERTON LN.
- Building Final**: SCHEDULED at 12:00 AM on Monday, Apr 11. Details: ADDRESS 2 FULLERTON LN.
- Electrical Disconnect**: SCHEDULED at 12:00 AM on Friday, Apr 8. Details: ADDRESS 2 FULLERTON LN.

The left sidebar contains icons for 'Accela Ad Hoc Report...', 'BLD15-051...', and 'BLD15-000...'. There are also 'Filter' and 'grid' icons at the top right of the task list.

If a user has permissions to switch UI (via ENABLE_80_UI configuration), the user can switch from the new UI to the V360 UI using the **Switch to V360** option on the Settings menu, as shown below:



Related Information

- *Civic Platform User's Guide > Getting to Know the New User Interface*

Configuring Page Links on the Launchpad

The new UI has transformed the {Console} > {Pages} > {Portlets} presentation hierarchy into a simple set of navigable pages. The new UI no longer uses portlets; instead the V360 portlets now display as pages. The launchpad on the new UI provides navigation links that allow users to quickly go to the different pages within Civic Platform.

The screenshot shows the Civic Platform Launchpad. It has three main areas:

- Your Pages:** A grid of links to various pages, including "Record", "Owners", "Addresses", "Enforcement", "Parcels", "Preference Management", and "Building Permit". Each link has a yellow star icon.
- Recent:** A list of recent records opened by the user, such as "16CAP-00005371", "16CAP-00005364", etc.
- Reference Data:** A sidebar with links to "Address", "Parcels", "Owners", "Assets", "Contacts", and "Professionals".

 The sidebar also lists recent records: "16CAP-00005371", "16CAP-00005364", "16CAP-00005362", "16CAP-00005354", "16CAP-00005355", "16CAP-00005363", "16CAP-00005339", "16CAP-00005361", "15CAP-00000234", and "16CAP-00005351".

The launchpad has three main areas:

- **Your Pages** which shows the pages the user has access to, including **Favorites** and **All Pages**
- **Recent** list of records opened by the user
- Reference data such as **Address**, **Parcels**, **Owners**, and others

The **All Pages** section of the launchpad shows a categorized list of all pages the logged-in user has access to. It is a consolidated list of pages that correspond to portlets that have been configured on all pages across all V360 consoles. In general, a configured portlet that the user can access on any console shows as a page link under **All Pages**.

The screenshot shows the 'Civic Platform' launchpad interface. On the left, there are navigation icons for Home, Search, and a grid. The main area is titled 'Your Pages' with a '+ New' button. Below this, there are several cards representing different portlets: 'Record' (with a star icon), 'Owners' (with a star icon), 'Addresses' (with a star icon), 'Enforcement' (with a star icon), 'Parcels' (with a star icon), 'Preference Management' (with a star icon), and 'Building Permit' (with a star icon). At the bottom of the 'Your Pages' section is a link labeled 'All Pages' with a hand cursor icon. To the right of this section is a vertical list of recent items, each preceded by a small preview icon. The categories for these items are listed on the far right: Address, Parcels, Owners, Assets, Contacts, and Professionals. The recent items listed are: 16CAP-00005371, 16CAP-00005364, 16CAP-00005362, 16CAP-00005354, 16CAP-00005355, 16CAP-00005363, 16CAP-00005339, 16CAP-00005361, 15CAP-0000234, and 16CAP-00005351.

For example, if the **Activities**, **My Tasks**, and **Task Management** portlets are configured on different pages of the V360 **Planning** and **Building** consoles, and the user has access to these portlets, they will show as page links on the launchpad. The following example shows the **Activities**, **My Tasks**, and **Task Management** page links on the launchpad, including other pages corresponding to V360 portlets the user has access to:

This screenshot shows the same Civic Platform launchpad interface as above, but with a different set of visible page links. The 'Your Pages' section now includes 'All Pages' (with a dropdown arrow icon) and a 'Filter list...' input field. Below this, the portlets listed are: 'Activities' (highlighted with a yellow background and a hand cursor icon), 'My Tasks', 'Task Management', 'Asset Management', 'Asset Condition Assessment', 'Assets', and 'PM Schedules'. The rest of the interface, including the vertical list of recent items and the category sidebar, remains the same as the first screenshot.

To remove a page link from the list of all pages, remove the portlet from all pages across all V360 consoles via **Administration > Console Configuration**.

Note: The order and categorization of pages under **All Pages** currently cannot be customized.

Related Information

- *Civic Platform User's Guide > Getting to Know the 8.0 User Interface*

Optimizing Form Designs

Civic Platform's new UI inherits existing form designs used with the legacy V360 UI. Now that forms are displayed as pages and no longer wrapped within portlets, a page opens up more space for a form view. To take advantage of the additional real estate on the page, a form view can be redesigned. Redesigning a form view can reduce or even eliminate the need to scroll.

The following example shows a **Custom Fields** form that can be re-organized to utilize all of the white space available on the right side of the page:

The screenshot shows a 'Custom Fields' form for record ID 16CAP-00005371. The left sidebar lists various entity types with their counts: Custom Lists (1), Application History (1), Fee History (1), Assets (0), Assignments and Costs (1), Calendar, Classic Reports, Comments (0), Communications (0), Conditions (0), and Conditions of Approval (0). The main content area is titled 'Custom Fields' and contains several input fields. A red box highlights the right side of the screen, indicating available white space. The fields include:

- API-ASI-GRP: A dropdown menu currently set to 'Select'.
- API-COL1-LBL: A dropdown menu currently set to 'Select'.
- API-COL2-LBL: A dropdown menu currently set to 'Select'.
- API_COL3-LBL: A dropdown menu currently set to 'Select'.
- 23: An input field containing the number 23.
- AA: An input field containing the letters AA.
- testarea: A text area containing the text 'testarea'.
- check spelling: A link labeled 'check spelling'.
- SELECTION: A radio button group with 'Yes' selected.
- MONEY: An input field labeled '(Money)'.
- 30: An input field containing the number 30, labeled '(Number)'.
- TIME: An input field with a dropdown menu currently set to 'AM'.

Similarly, existing V360 list view designs are inherited by the new UI. Now that lists are no longer wrapped in portlets, there is more vertical real estate available to display list items. The following example shows a record list view in the new UI with additional white space at the bottom:

The screenshot shows the 'Addresses' list view in the Civic Platform. The left sidebar has icons for Address Book, Search, and a CAP number (16CAP-00005371). The main area title is 'Addresses' with a subtitle 'Showing 1-5 of 50+'. A table lists five address entries. Below the table is a page navigation bar showing 'Page 1 of 10'. A large red box highlights the empty vertical space below the table.

Street # (start)	Street Name	Unit Type	Unit # (start)	Street Type	City	State	Neighborhood	Direction
1301	REDWOOD			WAY	PETA...	CA		
1372	MCDOWELL			BLVD	PETA...	CA	N	
1388	MCDOWELL			BLVD	PETA...	CA	N	
1384	MCDOWELL			BLVD	PETA...	CA	N	
1380	MCDOWELL			BLVD	PETA...	CA	N	

The empty space can be optimized by increasing the default number of rows displayed. To adjust the list view settings:

- From a list, click **Menu > Edit View**:

The screenshot shows the 'Addresses' list view with the 'Edit View' option highlighted in the menu. The menu also includes 'Customize Content', 'CSV Export', 'Report', 'Expand List', 'My Filters', and 'Print Page'. The main area shows a table with two address entries: REDWOOD and MCDOWELL.

- On the list view editor, set the **Contract** to the number of rows to be displayed by default, and the **Expand** field to the number of rows to be displayed when the user chooses **Menu > Expand List**.

The **Contract** and **Expand** settings on the list view editor:

BPTDEV | Civic Platform

Addresses

Save Reset Cancel Help

Filter Name * test Source View Name Reference Address List

Description

Available Fields Selected Fields Effect Scope

Country/Region	Street # (start)	Module Building
Reference Address ID	Street Name	Group BuildingAdmin
Start Fraction	Unit Type	User ADMIN
Zip Code	Unit # (start)	
	Street Type	
	City	
	State	
	Neighborhood	
	Direction	

Number of Records
Contract 10
Expand 30

The page now displays more rows and less white space:

BPTDEV | Civic Platform

Addresses

Menu Search New Copy GIS View Log Help My Filters --Select--

Showing 1-10 of 48

	Street # (start)	Street Name	Unit Type	Unit # (start)	Street Type	City	State	Neighborhood	Direction
<input type="checkbox"/>	1301	REDWOOD			WAY	PETALUMA	CA		
<input type="checkbox"/>	1372	MCDOWELL			BLVD	PETALUMA	CA		N
<input type="checkbox"/>	1388	MCDOWELL			BLVD	PETALUMA	CA		N
<input type="checkbox"/>	1384	MCDOWELL			BLVD	PETALUMA	CA		N
<input type="checkbox"/>	1380	MCDOWELL			BLVD	PETALUMA	CA		N
<input type="checkbox"/>	1250	MCDOWELL			BLVD	PETALUMA	CA		N
<input type="checkbox"/>	1230	MCDOWELL			BLVD	PETALUMA	CA		N
<input type="checkbox"/>	NA	CORONA			RD	PETALUMA	CA		
<input type="checkbox"/>	1790	STONE CREEK			DR	PETALUMA	CA		
<input type="checkbox"/>	1788	STONE CREEK			DR	PETALUMA	CA		

Page 1 of 5 < >

You can also adjust the **DEFAULT_LIST_ROWS** standard choice to increase the result row display from a Global Search. The recommendation is 25-30 rows.

Some considerations related to form design:

- Not all forms need to be re-designed. Consider a phased approach to form re-design.
- The new UI and the V360 UI share the same form design. If your agency is planning to use the **Switch New UI**, a form that is redesigned in the new UI may no longer be optimized for V360 usage.

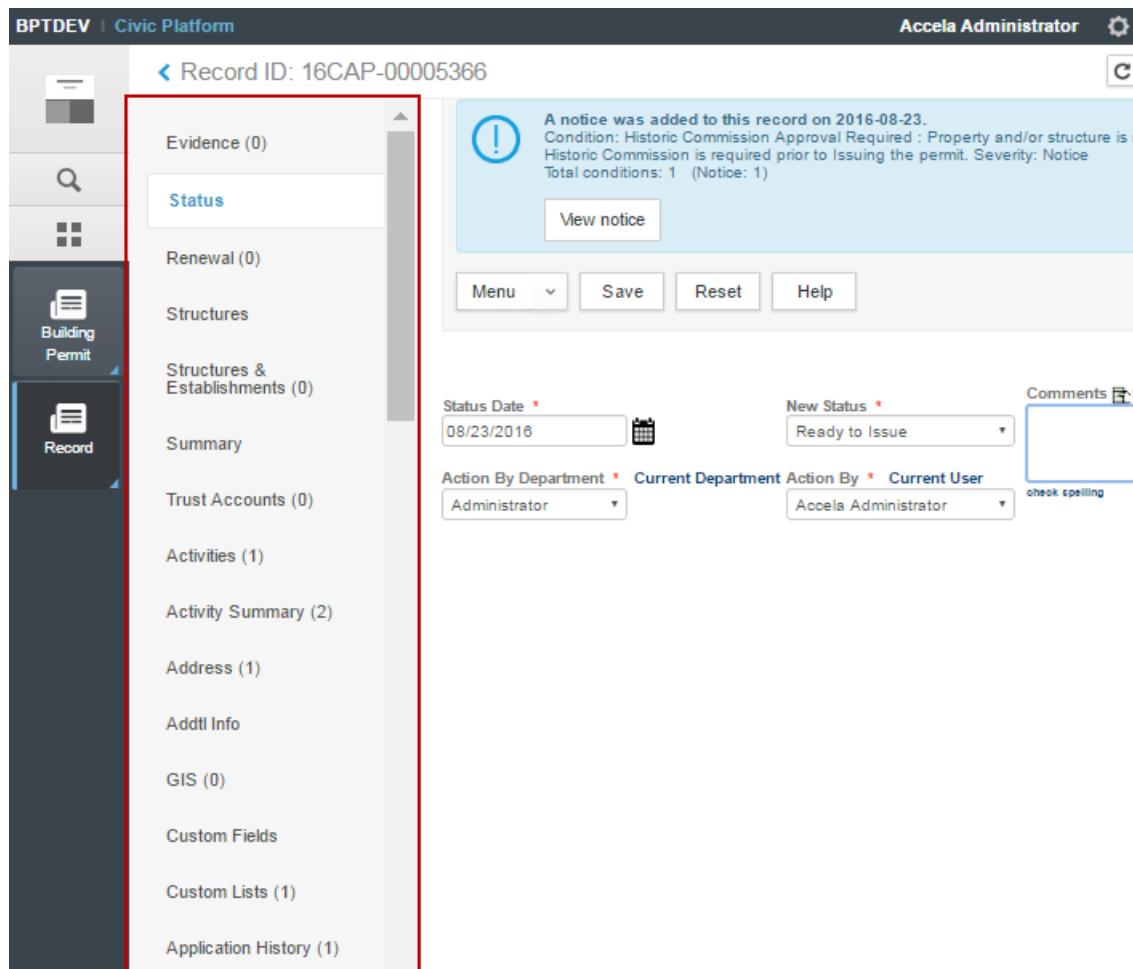
- As some users might have gotten comfortable with the V360 field layouts, an exercise to educate the users on the benefits of the new form layouts will help during the transition phase.

Related Information

- Civic Platform User's Guide > Getting to Know the 8.0 User Interface*

Configuring the Record Detail Menu

Civic Platform's new UI simplifies record detail navigation by replacing the My Navigation, Go To Menu, and horizontal tabs in the V360 UI with a vertical tab that lists the record detail objects. Here's a sample of a record page with the vertical navigation tab on the new UI:



The menu item configuration and order of the vertical tab is defined in **Administration > Agency Profile > Menu Navigation**. An existing V360 Menu Navigation configuration shows as the default vertical menu items on the new UI.

To customize the menu items on the vertical navigation tab for a user group on the new UI:

- Review the menu items on **My Navigation** and **Go To Menus** that are used by the user group in V360. This is an opportunity to analyze the most important and most commonly used pages, and remove any duplicate or unused pages.
- Go to **Administration > Agency Profile > Menu Navigation**.

3. On the menu navigation tree, open the appropriate agency, module, and user group, and define the consolidated set of menu items.

The following example shows the menu items defined in the Menu Navigation:

Related Information

- *Civic Platform User's Guide > Getting to Know the 8.0 User Interface*

Utilizing the Task Dashboard

Civic Platform's new user interface is task centric. The first page that opens when a user logs into the new UI is the **Task Dashboard**. This dashboard displays a consolidated list of the user's "My Tasks", including Workflow Tasks, Inspections, Document Review Tasks, Meetings and Activities. The default view shows the Tasks assigned to the user. Tasks can be viewed as task cards or as a list. The following example shows sample task cards:

The screenshot shows the Civic Platform Task Dashboard. At the top, there is a header with the agency name 'PETALUMA | Civic Platform', the user name 'John Q Smith', and a settings gear icon. Below the header, the word 'Tasks' is displayed next to a refresh icon. A search bar is followed by a 'Showing 6 task(s)' message. In the center, there are two task cards. The first card is titled 'Resend Permit' and due on 'Jul 27 DUE Today'. It has a description: 'Resend the Permit Summary report to John Hurt, he said it did not arrive in his email.' The second card is titled 'Call John Hurt' and also due on 'Jul 27 DUE Today'. Its description is: 'Notify him that his check for re-inspection fees bounced.' At the bottom of each card, there is a 'DUE Jul 27' and an 'ACTIVITY ID 614061' for the first card, and 'DUE Jul 27' and 'ACTIVITY ID 614060' for the second card. In the top right corner of the dashboard area, there is a 'Filter' dropdown and a small icon consisting of four dots in a grid, which is highlighted with a yellow box and an arrow pointing to it from the text 'Toggle between task cards and list'.

From the Task Dashboard, the **Filter** menu shows a consolidated list of filters that are inherited from existing Quick Queries or Saved Searches that are configured in the V360 My Tasks and Task Management portlet. For example:

Showing 6 task(s)

Task Item	Due Date	Flags	Status	Location
GR50 - SubGrade 00000126	12:00 AM Jun 22	1	Scheduled	
Phone Call	7:00 AM Nov 30		DURATION 1 HR	
Follow-up Call	7:00 AM Nov 27		DURATION 1 HR	LOCATION BoCC Bo&
Meeting	11:59 PM Oct 15		APPROVED	LOCATION BoCC Bo&
To be Defined 15898-00000-00008	12:00 AM Sep 30	4	Rescheduled	ADDRESS Address n
Electrical 000000000000242	12:00 AM Sep 29	2	Rescheduled	ADDRESS Address n

[Load more...](#) [Column View](#)

If your agency does not currently use the V360 My Task portlets, consider creating Filters (Quick Queries) that will provide a list of workflow tasks available to track a record status, and those responsible for completion and specific due dates.

Activities can also be used to assign tasks related to a record outside of workflow, inspections, etc. For those agencies that do not currently use Activities, this is a great opportunity to get record specific to-do lists out of your email and post-it notes and into the platform.

In the following example, the permit tech has been assigned to call the contractor about a bounced check and resend the Permit to the permit holder (note that these activities show as tasks on the [Task Dashboard](#) example above):

Related Information

- [Civic Platform User's Guide > Getting to Know the 8.0 User Interface](#)

Branding Civic Platform for Your Agency

You can apply your agency's brand to your Civic Platform implementation in a variety of ways.

You can customize the text that displays throughout your implementation; you can apply your agency's logo to a variety of items throughout Civic Platform; and you can set up an agency dictionary that works with the spell checker to ensure that your agency-specific nomenclature is used properly.

Click a topic title below for full details.

Related Information

[Customizing Display Text](#)

[Applying Logos to Items](#)

[Associating a Logo with an Agency](#)

[Displaying a Logo or Grade Card](#)

[Applying a Logo to Ad Hoc Reports](#)

[Configuring the Spell Checker and Agency Dictionary](#)

Customizing Display Text

There are certain display text settings throughout Civic Platform you can customize. For example, you can replace the default text settings to reinforce the terminology used by your agency, as well as make instructions and other messages clear to users. Text settings appear in error messages, in dialog boxes, and in other areas throughout the interface.

To add or edit a text setting

1. Access the Text Settings portlet ([Accessing the Text Settings Portlet](#)).

2. Click **New**.

Civic Platform displays a blank form in the secondary portlet.

The screenshot shows a user interface for managing display text settings. At the top, there is a header bar with buttons for 'Menu', 'Submit', 'Reset', and 'Help'. Below the header, there are two main input fields: 'New Display Text*' and 'Default Display Text*', each with a scrollable text area and a 'check spelling' link. To the right of these fields is a dropdown menu labeled 'Agency *' with the option '--Select--'. Below these fields are several other input fields: 'Module' (dropdown), 'Type' (dropdown), 'Category' (text input), 'Country/Region' (text input), and 'Language' (text input). There is also a small icon of a document with a checkmark next to the 'New Display Text*' field.

3. Add or edit display text.

Note: Civic Platform automatically populates the grayed out fields.

a. Click the **Select Display Text** icon below the field.

b. Click the text setting in the **Default Value** column that you want to add.

c. Accept or modify the text, in the **Display Text** field, that you want to display in the interface.

To use a specific parameter for a text setting, enter the parameter name surrounded by the “\$\$” signs. The parameter value then displays throughout the interface.



Note: Civic Platform does not display the Module field or Type field if you select the “Format—Phone Number” or “Format—Postal Code” categories.

4. Click Submit.

Adding Logos to Records

You can display images on records to help users easily:

- Confirm that they are working with the right record type
- Identify that they are working with the appropriate agency in super agency (multiple agency) environments

The screenshot shows a detailed administrative form for a Building Permit. The form includes fields for Record ID, Priority, Status, and various financial and tracking details. A prominent feature is a red-bordered 'Image' field containing a yellow hard hat icon, which serves as a visual identifier for the record type.

Figure 1: An easily identifiable building permit record type

Associating a Logo with a Custom Fields Subgroup

You must associate an image with a Custom Fields Subgroup as a means of branding the agency, enabling users to easily recognize the source of information.

To associate a logo with a Custom Fields Subgroup

1. Access the Logo portlet ([Accessing the Logo Portlet](#)).
2. Choose one of the following options:
 - To create a new agency logo association click **New**.

- To edit an existing agency logo association select the agency from the Logo list.
3. Complete or update the Logo fields as described in [Logo Field Descriptions](#).
 4. Click **Save**.

Table 2: Logo Field Descriptions

Agency	Select the agency name. Agency is a required field.
Description	Provide a brief description of the image used as the Agency Logo.
File Name	Click Browse to search and select the image you want to associate with the agency.
Logo Type	Select the Custom Fields Subgroup Name.
Logo URL	Provide the image URL in this field when the image you want to use as the logo resides on the web.

Associating a Logo with an Agency in Citizen Access

If your agency has associations with other agencies, you can create a Custom Fields Subgroup representing each agency and associate the city, county, or state logo with it. Creating Custom Fields Subgroups is particularly useful if your agency uses Citizen Access for multi-service administration. During the record creation process, the public user views fees allocated to a permit application from the state and city in which they live. An image displays next to the agency to indicate the agency where the fee originates, as shown on [Associating a Logo with a Custom Fields Subgroup](#). The agency logos display on the Fee page, Custom Fields Subgroup, and on the Payment Page in Citizen Access.

The screenshot shows the 'Permit Application' workflow with the 'Fees Details' step selected. The 'Application Fees' section displays fees for two agencies: Marion and Salem. Marion's fees are listed as \$100.00 for Permit Type1 (New Pipes) at quantity 1. Salem's fees are listed as \$140.00 for Permit Type2 (Water Heater) at quantity 1, and \$80.00 for New Roof at quantity 1. The total fees are \$240.00.

Application Fees		
Marion		
Fees	Qty.	Amount
Permit Type1		\$100.00
New Pipes	1	\$100.00
Salem		
Fees	Qty.	Amount
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

Figure 2: Agency Logo on Fee Detail page in Citizen Access

To associate a logo with an Agency

- Configure the Standard Choice below. This defines the agency logo type (Custom Fields Subgroup) used in Citizen Access to retrieve the agency log.

a. Access the Classic Administration page ([Accessing Classic Administration](#)).

b. Navigate to **Agency Profile > Standard Choices**.

c. Configure the Standard Choice **MULTI_SERVICE_SETTINGS** as described below:

Standard Choices Value	AGENCY_LOGO_TYPE
Value Desc.	LOGO_TYPE_CATEGORY

Civic Platform maps this logo type with the MULTI_SERVICE_SETTINGS Standard Choices Value AGENCY_LOGO_TYPE.

- Access the Logo portlet ([Accessing the Logo Portlet](#)).
- Choose one of the following options:
 - To create a new Agency Logo association click **New**.
 - To edit an existing agency logo association click the name of the agency in the Logo list.
- Complete or update the Logo fields as described in [Table 2: Logo Field Descriptions](#).
- Click **Save**.

Table 3: Logo Field Descriptions

Agency	Select the agency name. Agency is a required field.
Description	Provide a brief description of the graphic used as the agency logo.
File Name	Click Browse to search and select the image you want associated with the agency.
Logo Type	Select the Custom Fields Subgroup Name.
Logo URL	If the image you want to use as the logo is on a website provide the image URL in this field.

Displaying a Logo or Grade Card

You can add your agency logo to the User Information portlet. You can also add a grade card to the Food Facility Inspection Details page in Citizen Access to indicate the inspection results for the licensed food facilities. You can change the logo or grade card at any time, or remove it from the portlet. If your jurisdiction covers multiple agencies, you can assign a unique logo for each agency.

Topics

- [Adding a Logo or Grade Card](#)
- [Removing a Logo or Grade Card](#)
- [Changing a Logo or Grade Card](#)

Adding a Logo or Grade Card

You can upload a logo image for each agency in your jurisdiction. Civic Platform displays the logo in the User Information portlet. You can also upload a grade card image for the food facility to indicate the inspection result in Citizen Access.

To upload a logo or grade card image

1. Access the Logo portlet ([Accessing the Logo Portlet](#)).
2. Click **New**.
Civic Platform displays the Logo form portlet.
3. Complete the fields as necessary.
For descriptions of the fields, see [Table 4: Image Fields and Options](#).
4. Click **Submit**.

Table 4: Image Fields and Options

File Name	Enter the file path and name of the logo image you want to display. To browse to the file, click Browse .
Logo Type	To upload logo image, select USERINFOLOGO from the drop-down list. To upload grade card image, select the value such as Grade A, Grade B, Grade C, or Closure. You define the values that populate in this list in the LOGO_TYPE_CATEGORY Standard Choice.
Description	Enter a description of the logo or grade card image.
Agency	Used only for uploading logo image. Select the agency where you want the logo to display from the Agency drop-down list.

Removing a Logo or Grade Card

Civic Platform allows you to remove an image, a logo or a grade card, you added previously to the User Information portlet or Food Facility Inspection Details page in Citizen Access. You can remove the image if you added the wrong file, or if you no longer want to display it.

To remove a logo or grade card image

1. Access the Logo portlet ([Accessing the Logo Portlet](#)).
2. Select the image you want to remove.
3. Click **Delete**.
Civic Platform displays a delete confirmation message.
4. Click **OK**.

Changing a Logo or Grade Card

You can change the logo image that displays in the User Information portlet or displays as the grade card image in the Food Facility Inspection Details page of Citizen Access. You can change the image that displays if you added the wrong file, or if your agency logo changes. To change an image, you must first remove the image and then add a new one.

To change a logo or grade card image

1. Access the Logo portlet ([Accessing the Logo Portlet](#)).
2. Select the image you want to change.

3. Click Delete.

Civic Platform displays a delete confirmation message.

4. Click OK.

Civic Platform removes the selected image.

5. Click New.

Civic Platform displays the Logo form portlet.

6. Complete the fields as necessary.

For descriptions of the fields, see [Table 4: Image Fields and Options](#).

7. Click Submit.

Applying a Logo to Ad Hoc Reports

When a user wants to add an agency's logo to an ad hoc report, Civic Platform looks for a logo with the logo type AGENCY_LOGO and uses it automatically for the report.

To apply a logo to an ad hoc report

1. Configure the Standard Choice LOGO_TYPE_CATEGORY to include the Standard Choices Value AGENCY_LOGO.

a. Access the Classic Administration page ([Accessing Classic Administration](#)).

b. Navigate to **Agency Profile > Standard Choices**.

c. Configure the Standard Choice **LOGO_TYPE_CATEGORY** to include the following:

Standard Choices Value	AGENCY_LOGO
Value Desc.	A brief description to identify the logo file.

2. Access the Logo portlet (V360 Admin > Agency Profile > Logo**) and add the logo you want to use:**

a. Click **New**.

b. Click **Browse** to locate and select the logo file you want to use.

c. Select **Logo Type = AGENCY_LOGO**.

d. Select an agency from the **Agency** drop-down list.

e. Click **Save**.

The logo displays on ad hoc reports.

Configuring the Spell Checker and Agency Dictionary

You have the option to enable a spell checker utility for scrolling text fields in both Civic Platform and Citizen Access. The spell checker allows the user to identify and correct the spelling of any text that the

user enters. For example, an inspector can check the spelling of the comments he enters when resulting an inspection as illustrated in [Figure 3: Inspection Result Comment with Spell Checker](#)

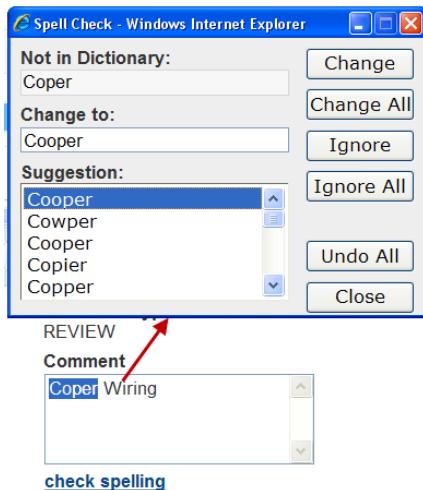


Figure 3: Inspection Result Comment with Spell Checker

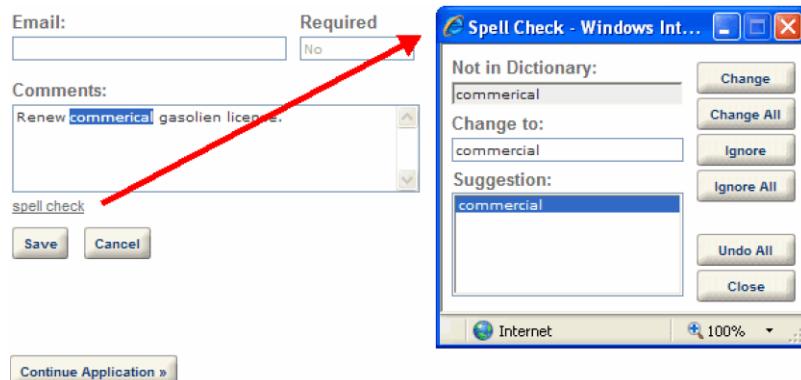


Figure 4: Citizen Access License Request Comment with Spell Checker

Civic Platform uses a standard dictionary for all spell checking. In addition, agencies can create custom dictionaries to incorporate industry- and agency-specific nomenclature. You can then make the custom dictionary available to users in Civic Platform, Citizen Access, and Mobile Office. When there is a custom dictionary available, Civic Platform uses both the standard dictionary and the custom dictionary for checking spelling. See [Creating Custom Dictionaries for Your Agency](#).



Note:

Civic Platform supports custom dictionaries for the English language only.

To enable spell checking

1. Access the Standard Choices Search form. (See "Editing Standard Choices in the Setup Admin" in the Civic Platform Configuration Reference).
2. Use the search utility to locate either or both of the following standard choices:
ACA SPELL CHECKER ENABLED (use to enable spell checking in Citizen Access).
SPELL CHECKER ENABLED (use to enable spell checking in Civic Platform and Mobile Office).
3. Enable either or both of the spell checker standard choices to set up the spell checker.

Creating Custom Dictionaries for Your Agency

Administrators can create custom dictionaries at an agency level. A Custom Dictionary portlet is available to review and manage custom dictionary entries. It is accessible in the Setup portlet in the Agency Profile menu. You must enable FID 0354-Custom Dictionary to configure the Custom Dictionary portlet.

When there is a custom dictionary available, Civic Platform uses both the standard dictionary and the custom dictionary when checking spelling.



Note:

Civic Platform supports custom dictionaries for the English language only.

After you configure a custom dictionary, and you sync it with Mobile Office, users must restart Mobile Office for the changes to take effect.

- [Searching for an Existing Custom Dictionary Entry](#)
- [Adding a Custom Dictionary Entry](#)
- [Deleting an Entry](#)

Searching for an Existing Custom Dictionary Entry

If you need to modify or remove a dictionary entry, you can search for existing words in your custom dictionary.

To search for an existing custom dictionary word

1. Access the Setup portlet.
2. Select **Dictionary** from the **Agency Profile** menu.

A dictionary administration portlet displays.

Word	Language	Description	Created Time	Created By
0 record(s) found.				

3. Click **Search**.

The Search form displays.

Word	Language -Select-	Description
Word	check spelling	
Created Time		
From		
To		

4. Enter search criteria as needed, then click **Submit**.

The search results display.

Adding a Custom Dictionary Entry

You can add as many words to your custom dictionary as you need.

To add a new word to the custom dictionary

1. Access the Setup portlet.
2. Select **Dictionary** from the **Agency Profile** menu.
A dictionary administration portlet displays.
3. Click **New**.
A Custom Entry form displays.

4. Complete the fields as described.

Word	Enter the word you want to add to the custom dictionary as you want it to appear (for example, enter the word in title case or in uppercase). If you enter a word that already exists in the standard dictionary but your entry is in a different case, Civic Platform presents both options to the user in the Suggested list.
Description	Optional: Enter a brief description of the word in this field.

5. Click **Submit**.

Civic Platform adds the new entry to the custom dictionary in Civic Platform, Citizen Access, and Mobile Office.

Deleting an Entry

You can delete words from your custom dictionary as needed.

To delete a word from your custom dictionary

1. Launch the Custom Dictionary portlet.

2. Use the search functionality to locate the term you want to delete. (see [Searching for an Existing Custom Dictionary Entry](#)).
3. Click **Delete**.
Civic Platform deletes the term.

Setting Up Your Console and Home Page

This section provides instructions on how to customize your console and home page, including configuring the console layout and skin, defining the main links and portlets in the console, and customizing the text that displays to users throughout the system.

Click a topic title below for full details.

Related Information

[Configuring the Civic Platform console](#)

[Adding a Main Link](#)

[Setting your Home Page](#)

[Adding Additional Consoles](#)

[Customizing Text](#)

Configuring the Civic Platform console

This section provides instructions on how to set up your console, including defining your home page, and customizing the main links that enable users to access portlets.

Topics

- [Customizing a Console](#)
- [Searching for a Console Configuration](#)
- [Editing a Console Configuration](#)
- [Managing Console Permissions](#)
- [Setting your Home Page](#)

Customizing a Console

Use the Console Editor to specify the names of the main links that display on your console, the order in which they display, and how many main links you want to display. Main links might include Civic Platform Administration, V360 Admin, Building, Inspection, Home, and Report Manager, for example. Then, for each main link, you define which portlets open on your console and where. For example, inspectors might want to associate the Calendar and Inspection portlets in the large portlet area, and the Bulletin Board portlet in the smaller side portlet area for the Inspections main link. Some portlets allow for further customization. For more information on customizing portlets, see [Customizing Menus, Tabs, and Drop-down Lists](#).

Topics

- [Navigating the Console Editor](#)
- [Configuring the Console Layout and Skin](#)

Navigating the Console Editor

The Console Editor is a configuration tool that enables you to add or modify the main links and portlets that display on your user interface. Use the Console Editor to create a unique user interface containing the

main links and portlets related to your day-to-day activities. For an example of the Console Editor and its associated parts, see [Figure 5: Console Editor](#).

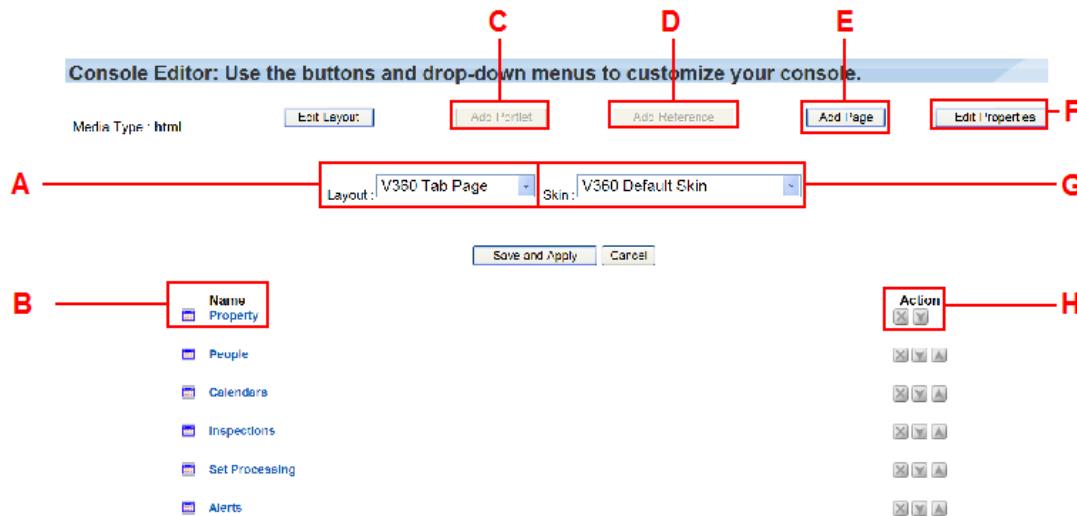


Figure 5: Console Editor

- A Layout menu. The console layout menu. Use this drop-down menu to modify portlet layouts.
- B Name label. The column label indicating the name and order of the main links on the console.
- C Add Portlet button. This button activates when you select a main link. Click this button to associate a portlet with a main link.
- D Add Reference button. Administrators or users with administrative rights can click this button to add a reference to another user's console.
- E Add Page button. Click this button to add a main link to the console. To associate a portlet with a main link, click Add Portlet.
- F Edit Properties button. Click this button to modify the name and description of a main link.
- G Skin menu. If your agency uses skins (colorful displays of console elements) you can use this drop-down menu to select and activate the skin.
- H Action. Use the action buttons to remove and reposition the main link display.

Configuring the Console Layout and Skin

You can select the layout and skin to apply in your console. The layout defines the appearance and placement of the main links in your console. The skin is the visual representation style of console elements.

Choosing Simple Skin or Standard Skin for the Agency

Civic Platform provides both a standard skin and a simple skin, which is the default. Compared with the standard skin, the simple skin presents streamlined look for pages and buttons, and better organizes information in the console. The simple skin enables users to expand and collapse the record list portlet to maximize the size of their workspace.

You can choose to enable a skin type in the Standard Choice UI_SKIN. The enabled skin type applies to the whole agency.

The figures below present a comparison between the simple skin and the standard skin interfaces.

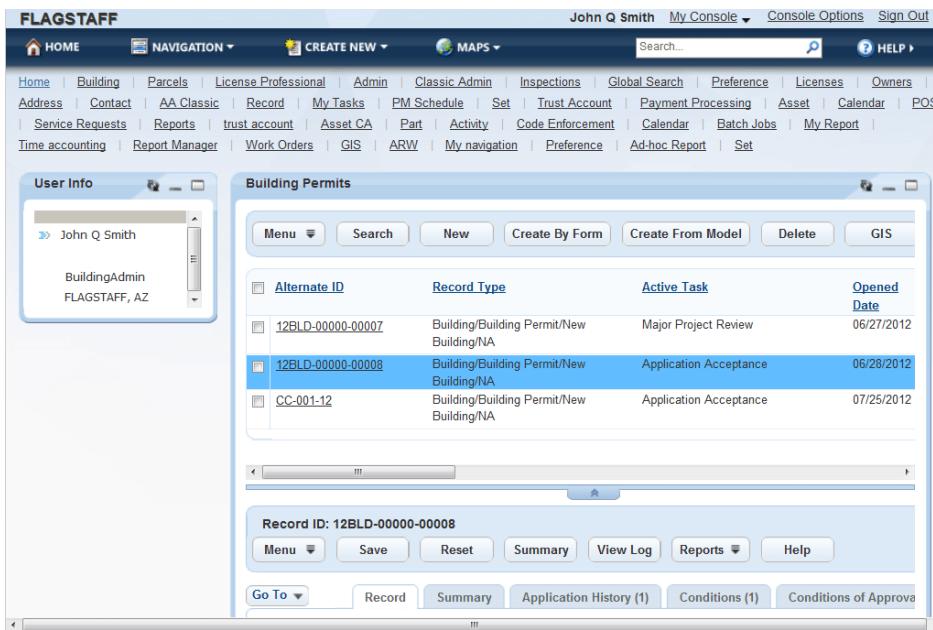


Figure 6: Console Display with Simple Skin

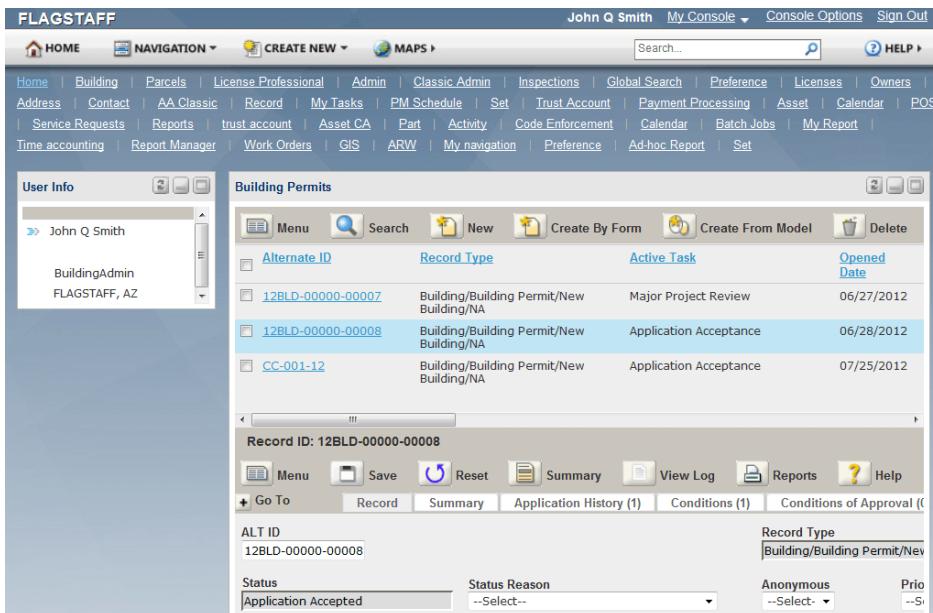


Figure 7: Console Display with Standard Skin

Setting the Layout and Skin for the Console

You can use the console editor to set the layout and skin used specially for a console.

To set the layout and skin for a console

1. Click **Console Options** in the upper-right corner of the console.



Civic Platform displays the Console Editor.

Name	Action
Home	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Property	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Inspection	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

2. Select the layout from the Layout drop-down, and the skin from the Skin drop-down.

There are two layout options, V360 PA Tab Page, and V360 Tab Page. The V360 PA Tab Page layout displays the main links in one row, which extends the page width of the console. With the V360 Tab Page layout, the main links display in several rows, which provides a fixed-width page view, with no need to scroll to see main links.

You can configure skin details in the super agency administration site.



Note:

If you apply the simple skin to the agency (see [Choosing Simple Skin or Standard Skin for the Agency](#)), the skin you select here is not applicable. If you apply the standard skin to the agency, the skin selected here takes effect in Classic Administration and Console Editor.

3. Click **Save and Apply**.

Civic Platform saves the settings.

Adding a Main Link

Main links display along the top of your home page and provide users with easy access to portlets.

Use the Console Editor to add, remove, or customize a main link.

You must be an administrator or a user with the proper permissions to access the Console Editor.

To add a main link

1. Click **Console Options** in the upper-right corner of the console.

Civic Platform displays the Console Editor.

2. To add a new main link, click **Add Page** in the Console Editor.

Civic Platform displays the Add Main Link page.

Console Editor: Use the buttons and drop-down menus to customize your console.

Media Type : html [Edit Layout](#) [Add Portlet](#) [Add Reference](#) [Add Page](#) [Edit Properties](#)

Type the name of the page to add :

[Apply](#) [Cancel](#)

3. Enter the name of the main link you want to add and click **Apply**.
Civic Platform displays the main link at the end of the main link list.
4. In the Console Editor, scroll to the end of the list of main links, and click the name of the main link you just added.
5. Click **Add Portlet**.
Civic Platform displays a list of available portlets.

Console Editor: Use the buttons and drop-down menus to customize your console.

Media Type : html [Edit Layout](#) [Add Portlet](#) [Add Reference](#) [Add Page](#) [Edit Properties](#)

Page :

Category	All Portlets	Parent	All Parents	Filter
Add	Title		Description	
<input type="checkbox"/>	AA Classic		V360 AA Classic Portlet	
<input type="checkbox"/>	Accela Ad hoc Report		V360 Ad hoc Report Portlet	
<input type="checkbox"/>	Accela Custom Portlet		Accela Custom Portlet	
<input type="checkbox"/>	Accela Custom Report		Accela Custom Portlet	
<input type="checkbox"/>	Accela News		Accela News	
<input type="checkbox"/>	Activities		V360 Activities Portlet	
<input type="checkbox"/>	Addresses		V360 Addresses Portlet	
<input type="checkbox"/>	Administration		V360 Administration Portlet	
<input checked="" type="checkbox"/>	Alerts		V360 Alerts Portlet	
<input type="checkbox"/>	ARW Reports		V360 ARW Reports Portlet	
<input type="checkbox"/>	Asset Condition Assessment		Asset Condition Assessment Portlet	
<input type="checkbox"/>	Assets		V360 Asset Management Portlet	
<input type="checkbox"/>	Batch Jobs		V360 Batch Jobs Portlet	
<input type="checkbox"/>	Building Permits		V360 Building Permits Portlet	
<input type="checkbox"/>	Bulletin Board		V360 Bulletin Board Portlet	

[Apply](#) [Cancel](#) [Next >>](#)

A B C D E F G H I J K L M N O P Q R S T U W

6. Locate the portlet you want to associate with the main link using the alphabetical links at the bottom of the page or the category and parent filters at the top of the page.
7. Click **Add** next to each portlet you want to associate with the main link, then click **Apply**.
Civic Platform displays the main link details page.
8. Click **Apply** and then Click **Save and Apply**.

Repositioning or Removing a Main Link

Civic Platform allows you to customize your console by determining the names of main links and the order in which they display. Use the Action button on the Customize page to remove or reposition main links.

To reposition or remove a main link

1. Click **Console Options** in the upper-right corner of the console.
Civic Platform displays the Console Editor.
2. In the **Action** column, reposition or remove a main link using the action buttons. These buttons are:



Move Up. Moves the main link up one position in the Console Editor. Modifies the console display by shifting the main link to the right.



Move Down. Moves the main link down one position in the Console Editor. Modifies the console display by shifting the main link to the right.



Remove. Removes the main link and its associated portlets.

3. Click **Save and Apply**.

Civic Platform saves the changes and returns to the home page.

Repositioning or Removing a Portlet

You can customize the portlets associated with a main link by modifying the portlet position or removing it. To accomplish these tasks, you must first navigate to the Console Editor. After you access the Console Editor, use the action buttons to arrange the portlets.

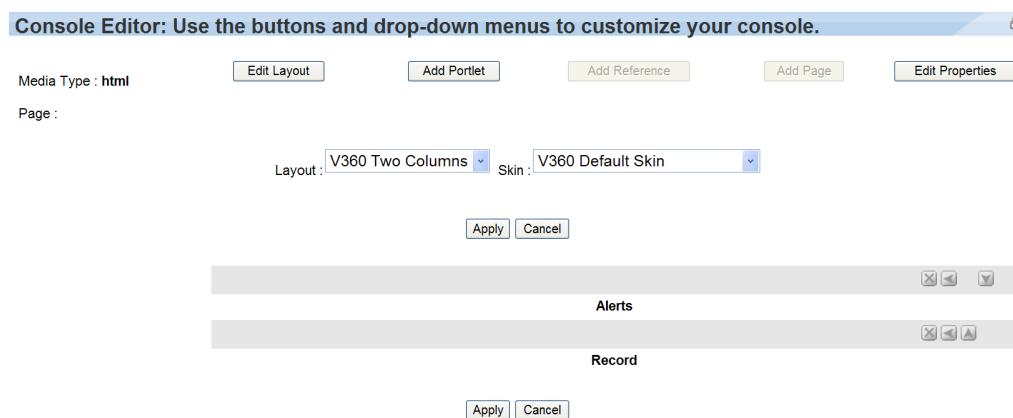
To reposition or remove a portlet

1. Click **Console Options** in the upper-right corner of the console.

Civic Platform displays the Console Editor.

2. Click the main link that contains the portlet you want to reposition or remove.

Civic Platform displays the main link details page.



3. Reposition or remove a portlet using the buttons. These buttons are:



Move Up. Moves the selected portlet one position up.



Move Down. Moves the selected portlet one position down.



Move Right. Moves the portlet to the right panel.



Move Left. Moves the portlet to the left panel.



Remove. Removes the portlet from the main link.

4. When you complete the process of repositioning and removing portlets, click **Apply**.

Civic Platform saves your changes and displays the Console Editor.

Setting your Home Page

A home page is the first page you view after logging into Civic Platform or the page that displays after clicking the Home button on the console toolbar. To customize your home page, you must create a main link and add the portlets you want associated with it. Then you must ensure that the main link you want to use for the home page is in the first position.

Adding Additional Consoles

You can customize multiple consoles to fit the needs of different types of users and departments. This can include creating a custom console that limits what some users have access to, and creating a more advanced console with expanded access for other users.

To add a customized console

1. Access the Console Configuration portlet ([Accessing the Console Configuration Portlet](#)).
2. Click **New**.
3. Enter the console name and console description.
4. Click **Customize**.
For more information about how to customize your console, see [Editing a Console Configuration](#).
5. Click **Submit**.
Civic Platform adds the customized console.

Searching for a Console Configuration

To search for console configuration

1. Access the Console Configuration portlet ([Accessing the Console Configuration Portlet](#)).
2. Click **Search**.
3. Enter the console name or console description, or both.
4. Click **Submit**.
Civic Platform displays the console configuration that match your search criteria.

Editing a Console Configuration

Administrators can create a standard console and assign it to a user group or module. The Console Configuration portlet is where you organize the various console configurations. You can modify the name and customize the color of portlets throughout Civic Platform. The color you choose for Civic Platform displays as the background color for the portlet selected. Blue is the default color scheme. Your other choices are: red, green, yellow, black, taupe.

To edit a console configuration

1. Access the Console Configuration portlet ([Accessing the Console Configuration Portlet](#)).
2. Select a console name from the list to modify the Console Name or Console Description.

Civic Platform displays the Console details.

The screenshot shows the 'Console Configuration' portlet. At the top, there's a toolbar with 'Menu', 'Search', 'New', 'Delete', and 'Help'. Below it is a table with columns: 'Console Name', 'Console Description', 'Last Updated', and 'Updated By'. The table lists several consoles, all named 'template ...' and updated on '01/03/2012' by 'CARELSUPER'. At the bottom of the table is a navigation bar with 'Save', 'Reset', and 'Help' buttons. Below the table is a section titled 'Recipient' with tabs for 'Console' and 'Recipient'. It contains fields for 'Console Name' (set to 'Asset Management') and 'Console Description' (set to 'template console'). There are also 'Edit Console' and 'Customize' buttons.

3. You can change the layout and choose a skin for your console.
 - a. Click **Console Options**.
Civic Platform displays the Console Editor.
 - b. If you want to change any console elements, see [Customizing a Console](#) for details.
 - c. Click **Save and Apply**.
Civic Platform returns you to the Console Configuration portlet.
4. To assign specific users to this console, click Recipient tab and follow the instructions in [Managing Console Permissions](#).

Managing Console Permissions

After creating a customized console, decide which agency, module, user group, and user has access to the customized console.

If your login account has access permissions to multiple consoles, Civic Platform provides a console name link (for example, **My Console**) in the right corner of the Agency Bar. You can click a console name link to open a drop-down menu of all available consoles, and then click a console name to switch between consoles. See [Figure 8: Switching between Consoles](#).

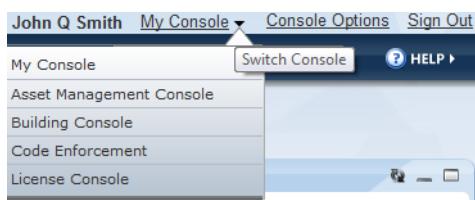


Figure 8: Switching between Consoles

Go to the Recipient tab in the Console Configuration portlet ([Accessing the Console Configuration Portlet](#)) to manage the agencies, modules, user groups, and users assigned to the customized console. For more information, see [Setting Up Security Policies](#).

Customizing Text

There are certain display text settings throughout Civic Platform you can customize. For example, you can replace the default text settings to reinforce the terminology used by your agency, as well as make instructions and other messages clear to users. Text settings appear in error messages, in dialog boxes, and in other areas throughout the interface.

To add or edit a text setting

1. Access the Text Settings portlet ([Accessing the Text Settings Portlet](#)).

2. Click **New**.

Civic Platform displays a blank form in the secondary portlet.

The screenshot shows a user interface for adding a new display text setting. At the top, there are four buttons: 'Menu' (with a dropdown arrow), 'Submit', 'Reset', and 'Help'. Below these are two text input fields: 'New Display Text*' and 'Default Display Text*', both with scroll bars. To the right of these is a dropdown menu labeled 'Agency *' with the option '--Select--'. Below these fields are several other input fields: 'Module' (dropdown, '--Select--'), 'Type' (dropdown, grayed out), 'Category' (text input, grayed out), 'Country/Region' (text input, grayed out), and 'Language' (text input, grayed out). A blue link 'check spelling' is located below the 'New Display Text' field. There is also a small icon of a document with a checkmark next to the 'New Display Text' field.

3. Add or edit display text.



Note:

Civic Platform automatically populates the grayed out fields.

- a. Click the **Select Display Text** icon below the field.
- b. Click the text setting in the **Default Value** column that you want to add.
- c. Accept or modify the text, in the **Display Text** field, that you want to display in the interface.

To use a specific parameter for a text setting, enter the parameter name surrounded by the " \$\$ " signs. The parameter value then displays throughout the interface.



Note:

Civic Platform does not display the Module field or Type field if you select the "Format—Phone Number" or "Format—Postal Code" categories.

4. Click **Submit**.

Customizing Menus, Tabs, and Drop-down Lists

This section provides instructions for configuring the navigation elements that enable users to access information and product features.

Click a topic title below for full details.

Related Information

[Overview](#)

[Working with Menus and Tabs](#)

[Creating Template Menus for Modules](#)

[Creating Template Menus for User Groups](#)

[Creating User Flow Diagrams](#)

[Creating Shared Drop-down Lists](#)

[Configuring Record Detail Tabs](#)

[Defining the Create New Menu](#)

[Customizing Go To Menus](#)

Overview

Administrators can create the following custom navigation elements that enable users to access the information they need to perform their daily tasks.

- Menus
- Tabs
- Flow Diagrams
- Drop-down Lists

Custom menus are drop-down menus that group and organize daily tasks together. You can use custom menus in place of, or in addition to, the standard record detail tabs. The sample screen below illustrates the “Go To” menu, where users access custom menus, and the standard record detail tabs. The Go To menu and the record detail tabs provide users two ways to quickly access and retrieve information to perform their daily tasks.

The screenshot shows a 'Record' detail view. At the top, there's a navigation bar with buttons for 'Menu', 'Search', 'New', 'Delete', 'GIS', 'View Log', 'Help', and 'My QuickQueries'. Below this is a table listing records with columns: Record #, Status, Record Type, Application Name, and Opened Date. Two records are listed: BLD12-00012 (Submitted, Multi-Family New, Park Place Apartments, 07/01/2012) and BLD12-00008 (CofO Issued, Residential New, Single family home, 03/08/2012). A pager at the bottom shows pages 1 through 6. The main content area displays record details for BLD12-00012, including fields for File Date (07/01/2012), Application Status (Submitted), Description of Work (New 55 unit apartment building), and Application Detail (Detail). A red box highlights the 'Record Detail Tabs' section, which includes tabs for Summary, Record, Activities (0), Activity Summary (1), Address (1), and Addtl Info. The 'Go To' button is circled in red with a yellow star icon.

Users can access custom menus by clicking the Go To menu on the upper left side of the detail form portlets. You can display a maximum of 16 menu items on custom menus, and then arrange those menu items so that they display in the order that is most useful to a specific module or user group.

To enable the Go To menu, you must enable Function ID 0230: Menu Navigation Admin. You must also enable the Standard Choice Menu_Navigation_Enabled. For more information on working with FIDs and Standard Choices, refer to the Civic Platform Configuration Reference.

The Menu Navigation Tree

Civic Platform uses a folder structure to configure, create, and display custom menus.

Figure 9: Menu Navigation Tree shows a sample configuration of custom menus and tabs, and gives the definitions for various navigation tree nodes. You can access the menu navigation tree by going to Administration > Agency Profile > Menu Navigation.

Click the plus (+) or minus (-) sign in the menu navigation tree to view the configurations at different levels. If you right-click a tree node in the menu navigation tree, the pop-up menu shows all the operations you can perform with the node. For example, if you right-click a module name, you can add groups or menu templates for the module, or delete the module settings.

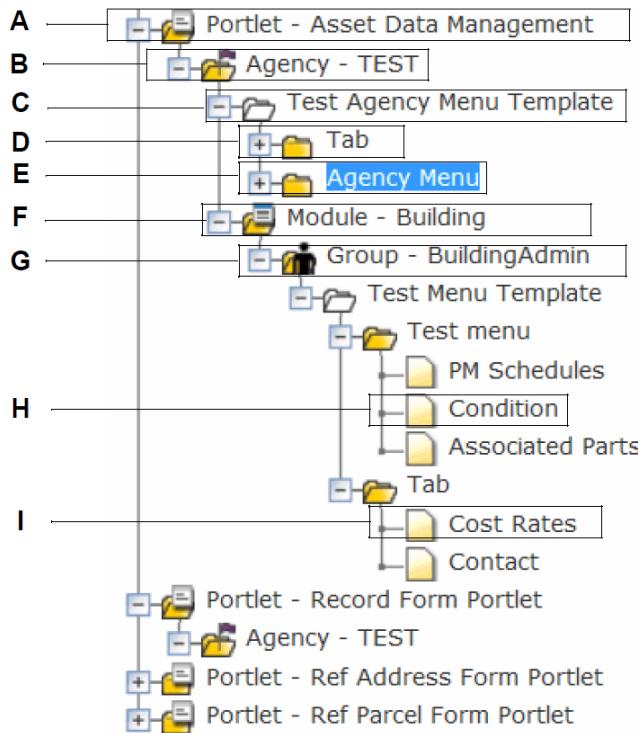


Figure 9: Menu Navigation Tree

- A The Portlet folder. Four portlet types can contain the Go To menu, custom drop-down menu and custom tabs: Asset Data Management (asset details portlet), Record Form Portlet (record details portlet), Ref Address Form Portlet, and Ref Parcel Form Portlet.
- B The Agency folder. You can add agency-level menu template, or add modules and groups and then configure module-level and group-level templates in this folder.
- C The Template folder. You can create template menus for the entire agency or for individual modules and groups. You can add custom menus or tabs with the right-click options, or open a template menu and then change its settings.
- D The Tab folder. You can add a tab menu and create tabs within it. Only the selected tabs display in the details portlet when users open the portlet.
- E Navigation Menus. Navigation menus are where you create or remove custom menus. You can add, cut, copy, paste, and delete a menu with the right-click options.
- F Module folders. You can create module folders and define module-level custom menu items and custom tab.
- G Group folders. You can create group folders and define custom menu items and custom tab that work for a specific group.
- H Menu items. Items are the daily tasks that a user performs. There can be a minimum of one menu item per menu, and a maximum of 16 items per menu.
- I Tab Items. If you define a tab and assign tab items to the tab, when users open the details portlet (see A), only selected tab items display in the details portlet.

Working with Menus and Tabs

Topics

- [Managing Template Menus](#)
- [Managing Menus](#)
- [Managing Tabs](#)

Managing Template Menus

Template menus provide a starting place for creating custom menus and tabs for the entire agency or for individual modules or groups. For example, if you want to create a menu specific to the building module, you can copy and modify the agency template menu. You can also create a separate template menu for the building module with tasks specific to the users within the building department.

Topics

- [Creating a Template Menu](#)
- [Deleting a Template Menu](#)
- [Copying a Template Menu](#)

Creating a Template Menu

If you assigned the template menu to a module, that template menu overrides any custom specific agency menu. If you assigned a template menu to a user group, that template menu overrides the custom module-level menu.

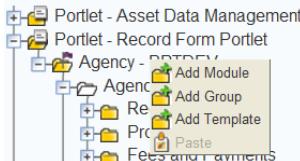
To create a template menu

1. Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).
2. Expand the desired portlet folder to the agency folder level.

Civic Platform displays the agency folder.



3. Right-click the agency folder and click **Add Template**.



Civic Platform displays the Template Menu portlet.

		Submit	Reset	Help
Menu Template Name *	Portlet Name			
	Ref Address Form Portlet			
Description	Show All Tabs			
	Yes			
check spelling				
Status	<input type="button" value="Disabled"/>			

4. Complete the fields that display. For a list of field descriptions, see [Table 5: Template Menu Fields](#).

5. Click **Submit**.

Civic Platform confirms you successfully created the menu template.

Table 5: Template Menu Fields

Description	Enter a description of the menu.
Menu Template Name	Enter a name for the template menu. For example, you might name a menu template for the building module Default Building Menu.
Portlet Name	The portlet where the menu displays. Civic Platform assigns this name automatically; it is read-only.
Show All Tabs	Select Yes or No to set whether all tab items display as the record detail tabs. Table 6: Tab Items to Display as Record Detail Tabs shows what tab items display as the record detail tabs at different custom tab and “Show All Tab” settings.
Status	Select Enabled to display the menu. Select Disabled to hide the menu.

Table 6: Tab Items to Display as Record Detail Tabs

“Show All Tabs” Setting	Custom Tab Configured	What Tab Items to Display as Record Detail Tabs?
Yes	Yes	Customized tab items
Yes	No	All built-in tabs
No	Yes	The first custom tab item
No	No	The Summary tab

Deleting a Template Menu

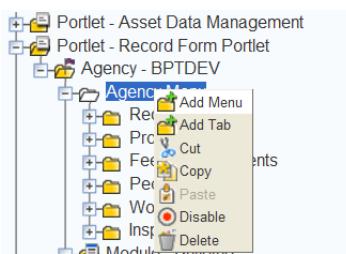
You can delete template menus you no longer need. When you delete a template menu, it effects all modules, user groups, and users who had the template menu assigned to them. For example, if you have an agency template menu and a building template menu for the building user group, all the building group users have the building template menu assigned to them. However, if you delete the building template menu, Civic Platform assigns the agency template menu to the building user group by default.

To delete a template menu

1. Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).

2. Expand to the portlet, module, or group folder where you want to delete the template menu.

Right-click the portlet, module, or group folder where you want to delete the menu template from and click **Delete**.



Civic Platform displays a confirmation window to delete the template menu.

3. Click **OK**.

Civic Platform confirms you successfully deleted the menu template.

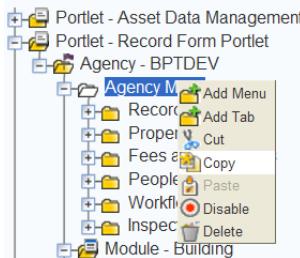
Copying a Template Menu

Copying and modifying template menus is a fast and efficient way to create multiple menus for your agency. You can save time by creating one menu and copy/pasting it to any module, user group or user. Then you can make minor modifications as needed for the specific modules, groups and users.

To copy the template menu

1. Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).
2. Right-click the template menu folder and click **Copy**.

Civic Platform copies the menu template.



3. Right-click the **Module** or **Group** folders where you want to copy the menu template, and then click **Paste**.

Civic Platform displays the Copy page.



4. Click **OK**.

Civic Platform copies the menu to the selected module or group.

Managing Menus

Menus are the basic building blocks of creating custom menu navigation. Custom navigation menus are drop-down menus that group and organize daily tasks together. You can use custom menus in place of, or in addition to, standard menus and record detail tabs. Civic Platform organizes the menu items to display in the order that is most applicable to a specific module or user group. Custom navigation menus display from the Go To menu tab on the upper left side in the detail form portlets where scroll tabs usually display.

When users select a custom navigation menu item from the Go To menu, if the detail tab includes that menu item, the menu item becomes the current tab in the detail tabs. If the detail tabs do not include the menu item, the menu item appears to the right of the detail tabs and becomes the current tab.

To create menus Civic Platform requires a minimum of one menu item and a maximum of 16 menu items. After you add menu items to a menu, you can add the menu to the template menu. After you add the menu to a template menu you can copy/paste it to template menus in other modules or user groups, and then make minor modifications to fit specific user needs.

Topics

- [Adding a Menu to a Template Menu](#)
- [Copying a Menu to a Template Menu](#)
- [Deleting a Menu from a Template Menu](#)
- [Adding Built-in Menu Items to a Menu](#)
- [Adding Custom Menu Items](#)

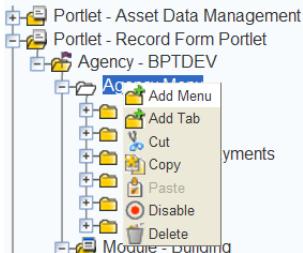
- [Removing Menu Items from a Menu](#)

Adding a Menu to a Template Menu

You can add custom drop-down menus to specific modules and individual user groups. For example, you can create a menu to grant access to a user that has limited access to certain tasks.

To add a menu to a menu template

1. Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).
2. Right-click the template folder and click **Add Menu**.



Civic Platform displays the Menu detail form portlet.

Menu Detail		Menu Items
Menu Name *	<input type="text"/>	
Description		
<input type="button" value="check spelling"/>		
Template Name	<input type="text" value="Agency Menu"/>	

3. Complete the following fields:

Description	Enter a description for the menu.
Menu Name	Enter a name for the menu.
Menu Template Name	This read-only field displays the template name you selected.

4. Click **Submit**.

Civic Platform confirms you successfully created the menu.

Copying a Menu to a Template Menu

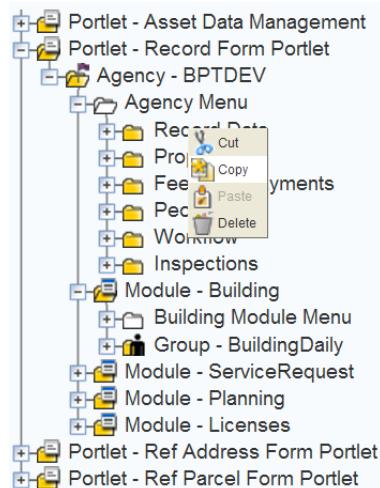
Copying menus is a fast and efficient way to create multiple menus for your agency. You can save time by creating one menu and copying it to multiple modules, users, or user groups. You can then modify the menu to meet the specific needs of the modules, users, or user groups.

To copy a menu

1. Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).

- Right-click the menu folder you want to copy and click **Copy**.

Civic Platform copies the template menu.



- Right-click the template folder where you want to copy the menu and click **Paste**.

Civic Platform displays the Copy page.

- Click **OK**.

Civic Platform copies the menu to the template menu.

Deleting a Menu from a Template Menu

Delete menus you no longer need using the right-click options available in the left navigation portlet. Deleted menus no longer display in the drop-down menu for the specified detail form portlet.

To delete a menu from a template menu

- Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).
- Right-click the template menu folder where you want to delete the menu from, and then click **Delete**.
Civic Platform displays a confirmation window to delete the menu from the template menu.
- Click **OK**.
Civic Platform confirms you successfully deleted the menu.

Adding Built-in Menu Items to a Menu

Built-in menu items are the default menu items in Civic Platform. You create a menu by adding and arranging menu items in a list. A menu is complete after you add the menu items, arrange them, and organize them in the drop-down list. You add menu items at the same time you create a menu or when modifying existing menus. You can add up to a maximum of 16 menu items to a menu.

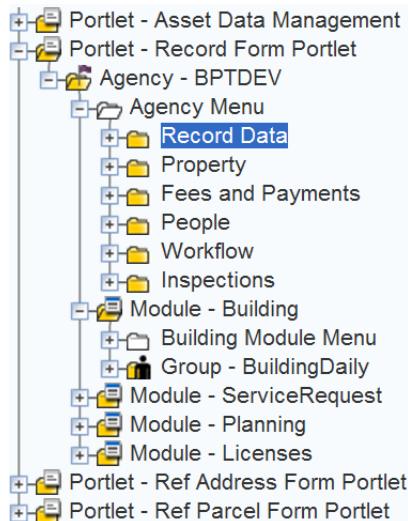
To add and arrange Built-in menu items to a menu, use the side-to-side and up/down arrow buttons. To move a menu item from the from the Built-in menu item list to the Selected menu item list highlight the Built-in menu item you want to move and click the single side-to-side arrow button. The single arrow button moves Built-in menu items to the Selected menu item list one at a time. The double arrow button moves all the Built-in menu items to the Selected menu item list. When you have added all the menu items you want to display, arrange the order of the Selected menu items with the up/down arrows.

To add menu items to a menu

- Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).

2. Expand the folders to the Template menu folder level.

Civic Platform displays the menus associated with the template.



3. Click the menu folder you want to add menu items to.

Civic Platform displays a Menu detail form portlet.

Use the tree to define the menu for a specified portlet

Menu Name *	Description
<input type="text" value="Agency Menu"/>	

[check spelling](#)

Template Name

4. Click the **Menu Items** tab.

Civic Platform displays the Menu Items portlet.

The screenshot shows the 'Menu Items' portlet interface. At the top are three buttons: 'Submit', 'New', and 'Help'. Below them are two tabs: 'Menu Detail' (selected) and 'Menu Items'. The main area has two sections: 'Built-in Menu Items' and 'Selected Menu Items'. The 'Built-in Menu Items' section contains a list of items: Activity Summary, Address, Addtl Info, AGIS, Application History, Assess Fee History, Assets, Assign, Assign Inspection, and Assign Task. The 'Selected Menu Items' section contains a list of items: Summary, Record, Activities, Comments, Conditions, App Specific Info, App Specific Info Tables, Documents, and Related Records. Between the two sections are four arrow buttons: a double up arrow, a single right arrow, a single left arrow, and a double down arrow.

- From the **Built-in Menu Items** list, select and highlight the menu item you want to add and click the right **Single Arrow** button to move the menu item to the Selected list. To select all the Built-in Menu Items, click the right **Double Arrow** button.

Civic Platform moves the Menu Item to the Selected Menu Items box.

This screenshot shows the same 'Menu Items' portlet after an item has been moved. In the 'Built-in Menu Items' list, 'Record' is highlighted. In the 'Selected Menu Items' list, 'Workflow', 'Fee', 'Education', and 'Summary' are listed. The arrow buttons between the lists remain the same.

- Use the **Up/Down Arrows** to select the order the menu items are to display. These buttons only effect the order the Selected Menu Items display.
- Click **Submit**.

Civic Platform confirms you successfully added the menu items to the menu.

Adding Custom Menu Items

You can add custom menu items that reference data not stored in Civic Platform using a hyperlink to a valid URL. For example, if a building permit clerk needs to reference building codes stored on your agency's Intranet, you can create a custom menu item that links with your agency's Intranet.

To add a custom menu item

- Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).
- Expand the portlet folder where you want to add the template menu.
Civic Platform displays the template menu.
- Click the menu folder where you want to add menu items.
Civic Platform displays a Menu detail form portlet.

Use the tree to define the menu for a specified portlet

- Portlet - Asset Data Management
- Portlet - Record Form Portlet
 - Agency - BPTDEV
 - Agency Menu**
 - Record Data
 - Property
 - Fees and Payments
 - People
 - Workflow
 - Inspections
 - Module - Building
 - Building Module Menu
 - Group - BuildingDaily
 - Module - ServiceRequest
 - Module - Planning
 - Module - Licenses
 - Portlet - Ref Address Form Portlet
 - Agency - BPTDEV
 - Agency - Ref Parcel Form Portlet

4. Click the **Menu Items** tab.

Civic Platform displays the Menu Items detail page.

Administration

- Portlet - Asset Data Management
- Portlet - Record Form Portlet
- Agency - SACRAMENTO
 - GenericMenu
 - Module - Building
 - BuildingMenu
 - Record**
 - Activities
 - Activity Summary
 - Addtl Info
 - App Specific Info
 - App Specific Info Tables
 - Summary
 - Record
 - Documents
 - Comments
 - Conditions
 - Status
 - Application History
 - Related Records
 - Renewal

5. Click **New**.

Civic Platform displays the Menu Items detail form portlet.

Submit Reset Cancel Help

Menu Detail Menu Items

Menu Item Name *	Menu Name
	Record Data
Description	Link *
<input type="text" value="https://"/>	
check spelling	
Menu Item Label	

6. Complete the applicable fields. For a list of field descriptions, see [Table 7: Custom Menu Item Detail Fields](#). When adding a Custom menu item you are referencing a URL outside of Civic Platform.
7. Click **Submit**.

Civic Platform confirms you successfully created the menu item and adds it to the menu.

Table 7: Custom Menu Item Detail Fields

Description	Enter a description for the menu.
Link	Enter a valid URL of the website for the custom menu item.
Menu Item Label	Enter the label for the menu item that you want to display in the drop-down menu.
Menu Item Name	Enter the name of the menu item.
Menu Name	The name of the menu for the menu item displays as read-only

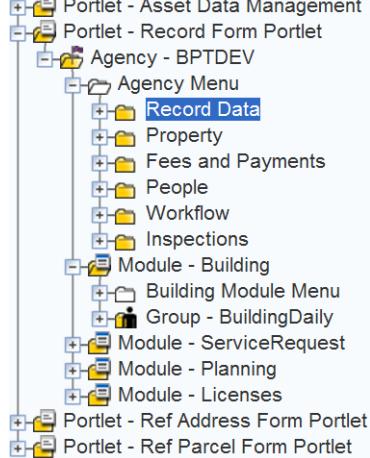
Removing Menu Items from a Menu

You can delete menu items you no longer want to display.

To delete menu items from a menu

1. Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).
2. Expand the folders to the template menu folder.

Civic Platform displays the menus associated with the template.



3. Click the menu folder from where you want to remove menu items.

Civic Platform displays a Menu Detail form portlet.

Use the tree to define the menu for a specified portlet

- Portlet - Asset Data Management
- Portlet - Record Form Portlet
 - Agency - BPTDEV
 - Agency Menu
 - Record Data
 - Property
 - Fees and Payments
 - People
 - Workflow
 - Inspections
 - Module - Building
 - Building Module Menu
 - Group - BuildingDaily
 - Module - ServiceRequest
 - Module - Planning
 - Module - Licenses
 - Portlet - Ref Address Form Portlet
 - Agency - BPTDEV
 - Portlet - Ref Parcel Form Portlet

4. Click the **Menu Items tab.**

Civic Platform displays the **Menu Items** portlet.

Submit New Help

Menu Detail Menu Items

Built-in Menu Items	Selected Menu Items
Activity Summary	Summary
Address	Record
Addtl Info	Activities
AGIS	Comments
Application History	Conditions
Assess Fee History	App Specific Info
Assets	App Specific Info Tables
Assign	
Assign Inspection	Documents
Assign Task	Related Records

5. From the **Selected Menu Items list, select and highlight the menu item you want to remove and click the right Single Arrow button to remove the menu item from the Selected list. To remove all the Selected Menu Items, click the right Double Arrow button .**

Civic Platform moves the menu item to the **Built-in Menu Items** box.

Submit New Help

Menu Detail Menu Items

Built-in Menu Items	Selected Menu Items
Activity Summary	Summary
Address	Record
Addtl Info	Activities
AGIS	Comments
Application History	Conditions
Assess Fee History	App Specific Info
Assets	App Specific Info Tables
Assign	
Assign Inspection	Documents
Assign Task	Related Records

6. Click **Submit.**

Civic Platform confirms you successfully removed the menu item.

Managing Tabs

The record detail tabs by default include every detail about a record that Civic Platform can support. If you want to select and display a few tab items instead, you can create a tab menu and add the desired tab items in the tab menu. Then the detail tabs only display the tab items in the tab menu. Users can quickly and easily grasp what they want to know about a record and what they should do for the record.

What tab items display as the detail tabs rely on both the tab menu configuration and the template menu “Show All Tabs” setting. For more information, see [Table 6: Tab Items to Display as Record Detail Tabs](#).

You create tabs in the template menu folders in the menu navigation tree. Each template menu folder can only hold one tab menu. Each tab menu inherits the settings from its template menu. For example, when you disable a template menu, it also disables the tab menu.

In addition to select tab items for a tab menu, you can define the order of the tab items, and customize the tab item labels.

See [Figure 10: Tab Menu Sample](#). The record details portlet has a custom tab menu with four tab items. Record, Related Records, Inspections and Work Order Tasks.



Note:

If you set the Function Identification for a tab to no access for a user group, those users are not be able to view the tab, regardless of whether you add it to the tab menu.

Topics

- [Adding a Tab Menu to a Template Menu](#)
- [Setting Tab Item Labels in a Tab Menu](#)
- [Deleting a Tab Menu](#)

The screenshot shows a record detail page for a Building Permit. At the top, there's a header bar with 'Building Permit ID: 13CAP-00003006' and buttons for 'Menu', 'Save', 'Reset', 'Summary', and 'Help'. Below this is a navigation bar with tabs: 'Go To', 'Summary', 'Record Info', 'Attachments (0)', 'Address (0)', 'Addtl Info', and 'App Specific Info'. The 'Summary' tab is selected. The main content area contains several input fields and dropdown menus. On the left, there are fields for 'Record # (13CAP-00003)' and 'Record Type (Building/Allen/...)'. On the right, there are fields for 'Record ID (13CAP-00000)', 'Est. Job Cost', 'Priority (Select...)', 'Est. Prod. Units', 'Assigned Date (02/19/2013)', 'Opened Date (02/19/2013)', 'Est. Cost Per Unit', 'Assigned to Department (Current Department)', 'Status', 'Total Job Cost (0)', 'Assigned to Staff (Current User)', 'Scheduled Date', and 'Total Pay (0.00)'. The 'Current Department' and 'Current User' links are underlined, indicating they are active tabs in the menu.

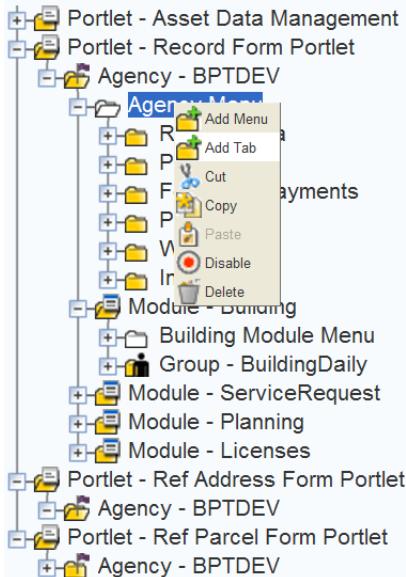
Figure 10: Tab Menu Sample

Adding a Tab Menu to a Template Menu

You can create tabs for detail portlets. Before you add a tab menu to a portlet, decide whether you want to enable the tab menu for the whole agency, specific modules, or individual user groups. Then follow the instructions in [Creating a Template Menu](#) to create a template menu in the agency, specific module, or individual user group.

To add tab menu to a template menu

1. Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).
2. Navigate to the template menu with which you plan to create the tab menu. The template menu can reside in the agency, module, or user group folder, depending on the scope in which you want the tab menu to take effect.
3. Right-click the template menu folder, and then click **Add Tab**.



Civic Platform displays the Tab Detail form portlet next to the menu navigation tree.

Tab Name *	Description
Tab	<input type="text"/>
check spelling	
Template Name	
Agency Menu	

4. Complete the following fields.

Description	Enter a description for the tab menu.
Tab Name	This read-only field displays "Tab," the default name reserved for tabs.
Template Name	This read-only field displays the template name.

5. Click **Submit**.

Civic Platform confirms you successfully created the tab menu.

6. Click the **Tab Items** tab.

Civic Platform displays the Tab Items portlet.

Built-in Tab Items

- Activities
- Address
- Addtl Info
- AGIS
- App Specific Info Tables
- Application History
- Assets
- Assignments and Costs
- Calendar
- Classic Reports
- Comments

Selected Tab Items

- Activity Summary
- App Specific Info
- Assess Fee History

7. Take the following actions to select tab items for the tab menu:

From the **Built-in Tab Items** list, select and highlight the tab item you want to add and click the right Single Arrow button to move the tab item to the Selected list. To remove all the Built-in Tab Items, click the right Double Arrow .

- a.** Civic Platform moves the Tab Item to the Selected Tab Items box.

Built-in Tab Items

- Activities
- Address
- Addtl Info
- AGIS
- App Specific Info Tables
- Application History
- Assets
- Assignments and Costs
- Calendar
- Classic Reports
- Comments

Selected Tab Items

- Activity Summary
- App Specific Info
- Assess Fee History**



Note:

- (1) Although available as built-in tab items, the following items only work as menu items and cannot display in the detail tabs: Copy, Clone and Assign, including Assign Inspection and Assign Task.
- (2) If you select "Application Spec Info" tab item, all the ASI screens display in the detail tabs.
- (3) If the Selected list is empty, all built-in tab items display in the detail tabs.

- b.** If you want to remove a tab item from the Selected list, select the item and click the left **Single Arrow** button. If you want to clear the Selected list, click the left **Double Arrow** button.

c.



Use the **Up/Down Arrows** to select the order the menu items are to display. These buttons only effect the order the Selected Menu Items display.

- 8.** Click **Submit**.

Civic Platform confirms you successfully added the tab items to the tab menu.

Setting Tab Item Labels in a Tab Menu

You can specify labels for any tab items in a tab menu. The labels are what users see for the corresponding tab items in the detail tabs. Without labels, the tab item names represent tab items in the tabs.

To set tab item labels in a tab menu

1. Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).
2. Expand the portlet folder where the tab menu resides.
3. Click the plus (+) sign next to the tab menu folder in which you want to set labels to tab items. The menu navigation tree expands the tab menu and displays all the tab items in the menu.
4. Select the tab item for which you want to set the label.

Civic Platform displays a Tab Item detail form portlet.

Tab Item Name *	Tab Name
Activity Summary	Tab
Description	Link
<input type="button" value="check spelling"/>	
Tab Item Label	<input type="text"/>

5. Enter the new label in the **Tab Item Label** field. The label is what users see for the tab item in the detail tabs.



Note:

You can ignore the **Link** field in the tab item detail portlet. This field is applicable for navigation menu items only. See [Adding Custom Menu Items](#) for the description of the field.

6. Click **Submit**.

Civic Platform confirms you successfully added the label to the tab menu.

Deleting a Tab Menu

You can delete tab menus that are not applicable for the portlet. You can remove the tab menu from the agency, module, or user group folder. After the deletion, all the built-in tabs display in the detail tabs for the agency, module, or user group.

To delete a tab menu from a template menu

1. Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).
2. Navigate to the template menu and find the tab menu you plan to delete. The template menu can reside in the agency, module, or user group folder, depending on the scope in which the tab menu takes effect.

3. Right-click the tab menu and click **Delete.**

Civic Platform displays a deletion confirmation window.

4. Click **OK.**

Civic Platform confirms you successfully deleted the tab menu.

Creating Template Menus for Modules

There are six modules in Civic Platform: building, service request, enforcement, licenses, permits, and planning. All these modules perform unique tasks in Civic Platform, which requires you to create a template menu for each module. When you add a template menu to a module you can add, delete, and modify the menus associated with the module.

This section includes these topics:

- [Adding a Template Menu to a Module](#)
- [Deleting a Template Menu from a Module](#)

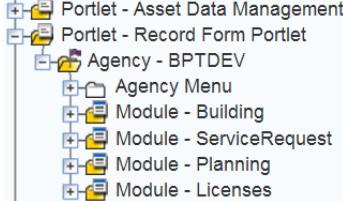
Adding a Template Menu to a Module

Creating template menus for specific modules streamlines the different tasks for each department in the agency. For example, the building department and the enforcement department perform some similar tasks, but they also have some unique, department-specific tasks. Creating module specific template menus helps users navigate to tasks that are unique to their department.

To add a template menu to a module

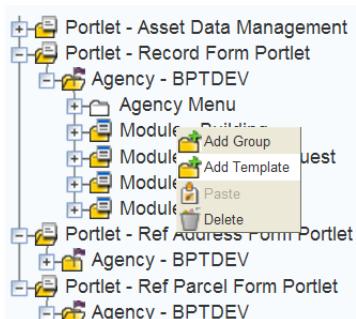
1. Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).
2. Expand the portlet folder where you want to add a template menu to a module.

Civic Platform expands the navigation tree to the module's folder level.

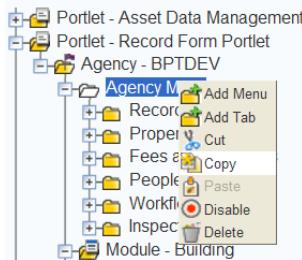


3. To add a template menu, choose one of the following steps:

- Right-click the module folder and click **Add Template**.



- Right-click the template menu folder you want to copy and click **Copy**.



4. To add the template menu, choose one of the following options:

- Create a Template Menu. For information on how to do this, see [Creating a Template Menu](#).
Civic Platform displays the Menu Template detail form portlet.

Submit	Reset	Help
Menu Template Name *	Portlet Name	
	Ref Address Form Portlet	
Description	Show All Tabs	
	Yes	
check spelling		
Status	Disabled	

- Click the module folder you want to copy the template menu to and click **Paste**.
Civic Platform displays the Copy page.



5. To complete the template menu, choose one of the following options:

- Complete the fields that display. For a list of field descriptions, see [Table 5: Template Menu Fields](#) and click **Submit**.
Civic Platform confirms the template menu was successful created and added to the module.
- If the template menu name is the same as the copied template menu, click **OK**. If you want to change the name of the template menu you are copying enter a new name in the Name field and click **OK**.
Civic Platform copies the template menu to the assigned module.

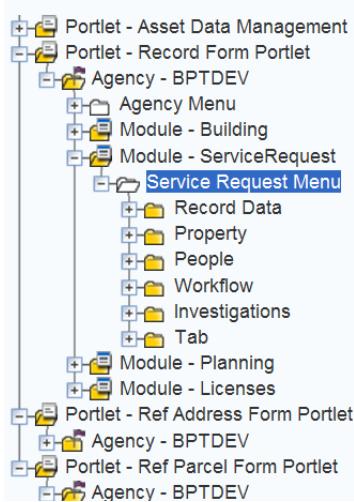
Deleting a Template Menu from a Module

If a template menu is no longer applicable to a specific module you can delete a template menu from that module. For example, if a department within the agency has restricted access and all the tasks change for that department, the template menu no longer applies to that department. It might be easier to delete the existing template menu and create a new one instead of editing the existing template menu. You must delete all the template menus sub-items before you can delete the template menu from the module.

To delete a menu from a module

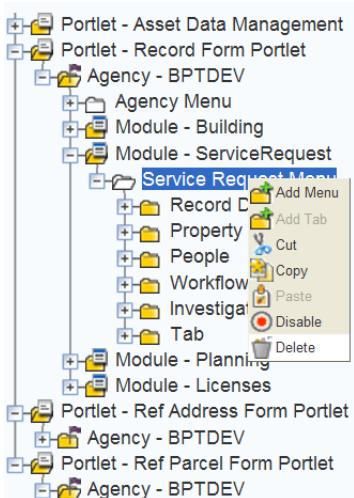
- Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).

2. Expand the portlet and module folders where you want to remove the group.



3. Right-click the template menu folder located in the module folder and click **Delete**.

Civic Platform displays a confirmation window delete the module.



4. Click **OK**.

Civic Platform confirms you successfully deleted the template menu.

Creating Template Menus for User Groups

Civic Platform assigns users to a user group, which enables you to control the menus and tasks users view in each module. For example, administrators can create a menu with tasks specific to permits for users in the permit group. Menus and template menus automatically display in the module assigned to the group where you assign the menu or template menu.

This section includes these topics:

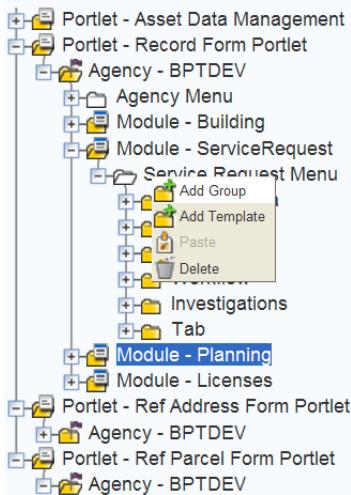
- [Adding a Template Menu to a Group](#)
- [Deleting a Template Menu from a Group](#)

Adding a Template Menu to a Group

Each user performs tasks specific to the user group you assigned them to in Civic Platform. Creating and adding template menus for specific user groups helps streamline the different tasks for each user in the department. Not everyone in a user group performs the same tasks. For example, in the permit user group administrators can create two different menus with tasks specific to a permit processor and a permit inspector. Creating and adding template menus to user groups helps users navigate to task that are unique to their job and department.

To add a menu template to a group

1. Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).
2. Open the portlet and module folders where you want to add a template menu to a group.



3. Right-click the module folder where you want to add a group and click **Add Group**.
Civic Platform displays a user group list.

User Group - Tree View



4. Click the user group you want to add to the module and click **Submit**.
Civic Platform confirms you successfully added the user group to the module.



User Group - Tree View



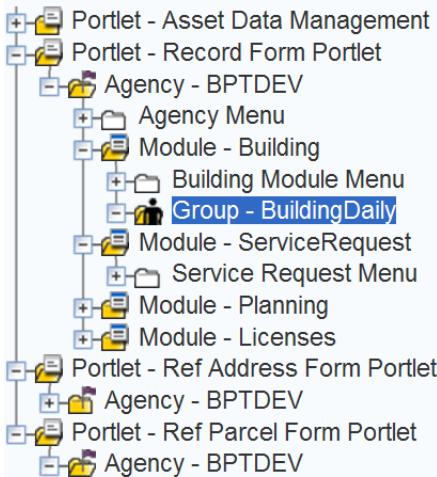
Deleting a Template Menu from a Group

If a template menu is no longer applicable to a specific user group you can delete a template menu from that user group. For example, if a user group within the building department has restricted access and all the tasks change for that user group the template menu no longer applies to that user group. It might be

easier to delete the existing template menu and create a new one instead of editing the existing template menu for that user group. You must delete all the template menu's sub-items before you can delete the template menu from a user group.

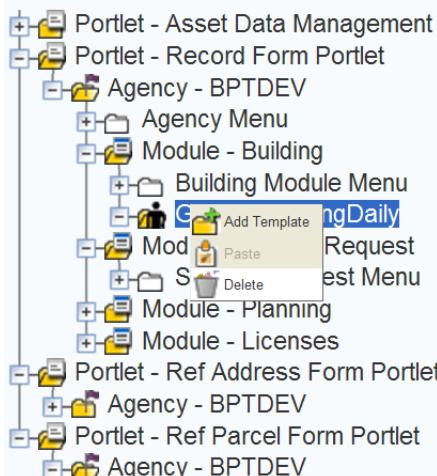
To delete a menu template from a group

1. Access the Menu Navigation portlet ([Accessing Menu Navigation](#)).
2. Open the portlet and module folders where you want to remove the group.



3. Right-click the group folder you want to delete the template menu from and click **Delete**.

Civic Platform displays a confirmation window to delete the group from the template menu.

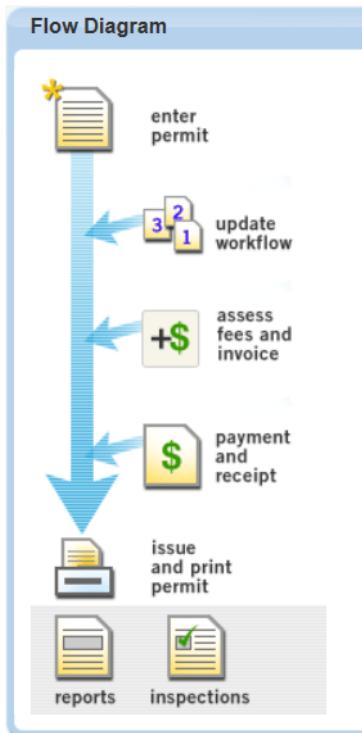


4. Click **OK**.

Civic Platform confirms you successfully deleted the template menu.

Creating User Flow Diagrams

You use the My Navigation portlet to define user flow diagrams. Flow diagrams provide users with a visual representation of the steps they follow to accomplish specific tasks. The icons in the flow diagram link to the portlets or URLs from where users perform their tasks.



To create user flow diagrams

1. Access the My Navigation portlet ([Accessing the My Navigation Portlet](#)).
- Delete an existing flow diagram.
 1. Locate an existing flow diagram by clicking on it in the My Navigation Name column or by searching for it.
 2. Click **Delete**.
- Edit an existing flow diagram.
 1. Locate an existing flow diagram by clicking on it in the My Navigation Name column or by searching for it.
 2. Complete the flow diagram configuration () .
- Create a new flow diagram.
 1. Click **New**.
 2. Complete the flow diagram configuration () .
2. Complete the flow diagram configuration.
 - a. Complete the **Diagram General** tab.

My Navigation Name	Enter the name for the new flow diagram. For example, you might enter “Counter Clerk” for a diagram to assist counter clerks with a simple workflow process for issuing a permit.
Description	Enter a description of the flow diagram. For example, you might enter “Counter Clerk workflow for issuing a new permit.”
Comments	Enter any comments about the flow diagram. The entered comments display at the bottom of the flow diagram portlet.

b. Complete the **Flow Nodes** tab.

- Delete a flow node.
 1. Select the checkbox next to the flow node(s) you want to delete.
 2. Click **Delete**.
- Change the order of the flow nodes.
 1. Modify the order number(s) next to the flow node(s) you want to reorder.
 2. Click **Submit**.
- Add a new node.
 1. Click the **New Node** button.
 2. Select the link type (portlet or URL) for the new node.
 3. Click **Submit**.
- Edit an existing node.
 1. Click the hypertext link for the node you want to edit.

c. Define new node parameters or edit existing node parameters ([Table 8: Flow Nodes Fields](#)).

Table 8: Flow Nodes Fields

Order	Indicates the relative order of the flow node (lowest/top to highest/bottom) in the overall diagram. Two nodes with the same order number appear on the same line in the flow diagram.
Portlet	For portlet link type only. The name of the portlet for the flow node.
Icon	For URL link type only. Select the icon you want to use for the flow node from the Icon drop-down list.
Target	The portlet frame the flow node points to.capForm. Specifies the form portlet frame.capList. Specifies the list portlet frame.
Text Align	The alignments of the text that displays next to the flow node icon.
Text	The text you want to display for the flow node icon.
Alternative Text	The text you want to display as the alternate text for the icon. The alternate text displays when the cursor hovers over the icon.
URL	For URL link type. The URL to the portlet for the flow node.
Onclick	Specifies the JavaScript function to run when a user clicks the flow node.doReport(). Runs a report.new(). Creates a new record.

d. Complete the **Recipient** tab ([Setting Up Security Policies](#)).

e. Click **Submit**.

Creating Shared Drop-down Lists

Shared drop-down lists are configurable lists you can apply to different group codes and templates in Civic Platform. When you define shared drop-down lists, users can access them from drop-down list values in the specified product area.

Example Use Case

You can create a drop-down list for a People template that indicates a licensed professional's years of experience. In other circumstances, you can create a drop-down list for an Application Specific Information group indicating the number of floors in a building.

You can populate a shared drop-down list by adding values and defining their display order.

When you create a shared drop-down list, you must apply it to a specific product area (see [Applying a Shared Drop-down List](#)).

To create a shared drop-down list

1. Access the Shared Drop-down list portlet ([Accessing the Shared Drop-down List Portlet](#)).
2. From the **Shared Drop-down List** tab, delete, deactivate, edit, or create a shared drop-down list.
 - Delete an existing shared drop-down list.
 1. Locate an existing shared drop-down list by clicking on it in the Name column or by searching for it.
 2. Click **Delete**.
 - Inactivate an existing shared drop-down list.
 1. Locate an existing shared drop-down list by clicking on it in the Name column or by searching for it.
 2. Set the **Status** field to Inactive.
 3. Click **Save**.
 - Edit an existing shared drop-down list.
 1. Locate an existing shared drop-down list by clicking on it in the Name column or by searching for it.
 2. Complete the shared drop-down list configuration.
 - Create a new shared drop-down list.
 1. Click **New**.
 2. Complete the shared drop-down list configuration.
3. Complete the shared drop-down list configuration.

Name	Enter the name you want to associate with the shared drop-down list.
Status	Use the drop-down list indicate if the drop-down list is active or inactive.
Description	Provide a brief description for the drop-down list.
4. Click **Submit** or Save.

5. From the **Values** tab, delete a value, change the order of values, add a value, or edit a value.
 - Delete a value.
 1. Select the checkbox next to the value(s) you want to delete.
 2. Click **Delete**.
 - Change the order of the values.
 1. Modify the order number(s) next to the value(s) you want to reorder.
 2. Click **Save**.
 - Add a new value.
 1. Click **New**.
 2. Complete the fields for the new value.
 3. Click **Submit**.
 - Edit an existing node.
 1. Click the hypertext link for the value you want to edit.
 2. Edit the field value(s).
 3. Click **Submit**.
6. Click the **Associations** tab to view the shared drop-down list associations.

Applying a Shared Drop-down List

When you create a shared drop-down list, you must apply it to the group or template where you want it to display. Civic Platform accommodates shared drop-down lists for multiple groups and templates. For more information on applying shared drop-down lists in available product areas, see [Shared Drop-down List Product Areas](#).

Table 9: Shared Drop-down List Product Areas

Activity Specific Information Groups	See Working with Activity-Specific Information Group Codes .
APO Templates	See Applying a Shared Drop-down List .
Application Specific Information Groups	See Applying a Shared Drop-down List .
Asset Attributes	See Creating an Attribute .
People Templates and Info Tables	See Applying Shared Drop-down Lists in people templates.
Task Specific Information Groups	See Applying Shared Drop-down Lists for workflows.

Configuring Record Detail Tabs

This section describes how to configure record detail tabs.

Configuring the Related Records Tab

You can configure a related records tab that enables users to build and view hierarchical relationships between records. These relationships are referred to as parent, child, and sibling relationships in Civic Platform.

Building relationships between records streamlines communication between different departments in your agency and enables batch processing – an efficient way for users to execute common processes on multiple related records. For example, users can create a set of related records that share the same workflow, and execute a batch process that updates the workflow task status for the entire set.

This section focuses strictly on how to configure related records. For complete details on how to this feature, including how to designate records as parents and children, and the other practical uses of this feature, refer to the online help available from the Help menu in Civic Platform.

Setting Related Records FIDs and Standard Choices

To enable this feature you must configure the following FIDs and Standard Choices, according to your agency's business objectives. For complete instructions on how to configure FIDs and Standard Choices refer to the Civic Platform Configuration Reference and the Administrator training modules available in Accela Success Community – specifically Configuring Related Records, parts 1 - 3.

Related Records FIDs

- FID 8154 - Application Hierarchy: enables the related records tab
- FID 8236 - Related CAPs Search: enables the Look Up button
- FID 8292 - Create Multiple Related CAPs: enables the Clone Mult button
- FID 8293 - Open New Related CAP in SPEAR: enables the Clone Sgl button
- FID 8323 - Update Related CAPs: displays an Update Related Records button, enabling users to update or refresh the list of related records.
- FID 8395 - CAP Summary: displays record summary information about related records. Works in conjunction with SC RELATED_CAP_SUMMARY; you must set both.
- FID 8460 - Delete Related Records: displays a Delete button, enabling users to delete related records.

Related Records Standard Choices

- RELATED_CAP_CONFIG specifies the fields (including the Application Name field) that display in the hierarchical view of the related records tab.
- RELATED_CAP_SUMMARY enables users to display record summary information about related records. Works in conjunction with FID 8395; you must set both.
- CAP_CHILD_DOCUMENT enables users to display documents associated with related records. Related documents only display on the parent record. Child records do not display the documents of the parent records.

Configuring the Application Summary Tab

You can create a customized Application Summary that contains a brief summary of the application, field information, and links to relevant portlets.

For a complete list of sections you can add to the Record Summary tab, see [Table 10: Application Summary Page Sections](#).

To configure the summary tab

1. Access the Form Portlet Designer ([Accessing the Form Portlet Designer](#)).
2. Select Portlet > Record Summary.

The screenshot shows the 'Form Portlet Designer' interface. At the top, there are buttons for 'New', 'Delete', 'Copy', and 'Help'. Below that is a navigation bar with tabs: 'Agency', 'Module', 'User Group', 'User', 'Personalization', and 'Dynamic Text'. The 'Agency' tab is selected. On the left, a list of portlets is shown, with 'Record Summary' highlighted. To the right, under the heading 'Copy to', there is a section for 'Agency' which is set to 'SACRAMENTO'. Below this, there are dropdown menus for 'Module', 'Group', and 'User', all set to 'Select [Module/Group/User]'. A preview area on the right shows a list of names, each preceded by the word 'SACRAMENTO'.

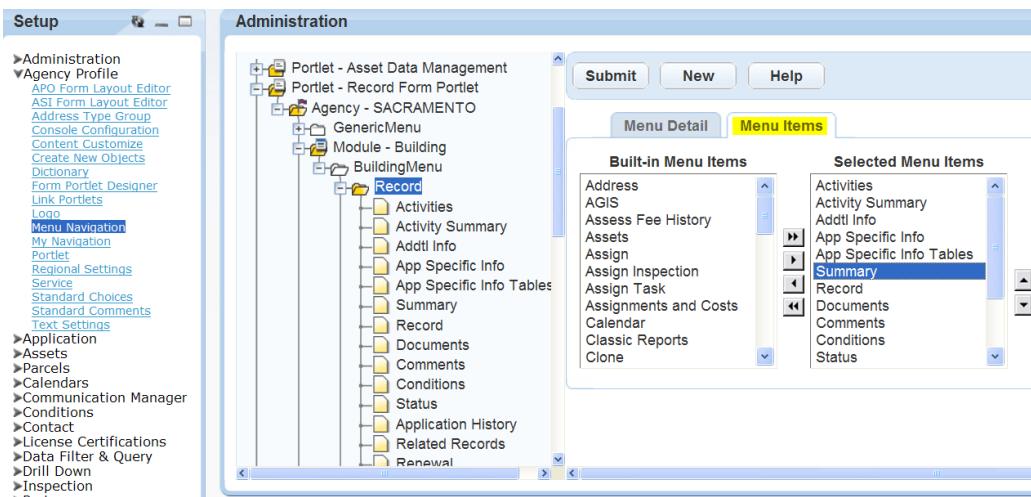
- Click **New** and assign the view as described in [Designing Forms for Portlets](#). For example, select the level you need, such as Agency, and then Click **Submit**.
3. For each field you want to display on the summary, select the field and Click **OK** on the **Available Fields** page. To manage fields, click Available Fields.
 4. Arrange the fields on the form in the same order you want them to appear to users when they complete the form. For instructions on arranging the form, see [Designing Forms for Portlets](#).
 5. Rename any of the field labels, according to your agency's business objectives, as follows:
 - a. Double click a field name to access the properties page for the field.
 - b. Modify the text that displays in the Label field. You cannot change the database label (DB Label).
 - c. Click **OK**.
 Civic Platform displays the form with your customized field name.
 6. To modify the properties of fields that display as sections or lists on the Summary page:

- a. Double click a section name or list name to access its properties page.
Civic Platform displays the Properties page for the section or list.

Properties:

Label	Contact Info
DB Label	Contact Info
Access key	
Tab index	
Required	No ▾
Read Only	No ▾
Mask	[]
By Range	[]
Customize Sub-section	[]
OK	

- b. Click **Customize Sub-section**. Refer to [Designing Forms for Portlets](#) for details on modifying the properties of sections and lists.
7. To restrict the display of fields based on your agency's business objectives, you can use Expression Builder functions. For complete details, refer to [Using Expression Builder](#).
Note, however, that because the Record Summary page is read-only, certain functions are not available for the Record Summary page. The only functions available for use with the Record Summary page are the OnLoad expressions.
8. Enter a descriptive **Filter Name**. The **Filter Name** is the name you can use later to locate the form if you need to make additional changes.
9. Click **Save**.
10. Configure the Application Summary page in the Menu Navigation (Go To) drop-down list so that agency users can easily navigate to different record tabs. For instructions on how to configure Menu Navigation, refer to [Customizing Menus, Tabs, and Drop-down Lists](#) .
11. Add the Summary tab to the Menu Navigation, so that it displays for users when they open a record.
 - a. From the Setup portlet, click **Agency Profile > Menu Navigation**.
 - b. From the Record Form Portlet, select the Agency > Module > Group > User > and Tab folder for whom you want the Summary tab to display.
 - c. Go to the **Menu Items** tab, add the **Summary** tab from the **Built in Menu Items list on the left**, and then arrange the order using the arrow buttons. See [Adding Built-in Menu Items to a Menu](#).



d. Click **Submit**.

Table 10: Application Summary Page Sections

Application Summary Page Section	Section Description
Adhoc Task Status	This section displays the status of any ad hoc tasks associated with the application.
Application Comments	This section displays application comments.
Application Detail	Click application detail to view the Record portlet.
Custom Fields	This section displays any Custom Fields your agency has added for the selected application type.
Application Type	Click application type to view the Record portlet. The application type displays as the record alias, if present. If a record alias is not present, the application type displays the 4-level organization path of the record.
Application Status	Click application status to view the Application Status portlet.
Balance	Click balance amount to view the Payment portlet.
Conditions of Approval	Click a condition name to navigate to the Condition of Approval portlet.
Condition Status	Click a condition to view the associated Condition Detail and History portlets.
Contact Info	This section displays the contact detail for application contacts.
Description of Work	Click description of work in this section to view the Record portlet.
Documents	This section displays documents associated with the application. Click a document's file name to navigate to Document Information portlet, where you can change a document's status and view document details, such as Document Review Tasks and Document Review History.
File Date	This section displays the date the application was submitted.

Application Summary Page Section	Section Description
Resulted Inspections	This section displays completed inspections associated with the application. For more information on the Inspections section, see Configuring the Record Summary Tab Inspection Section .
Scheduled/Pending Inspections	This section displays scheduled and pending inspections associated with the application. For more information on the Inspections section, see Configuring the Record Summary Tab Inspection Section .
Job Value	Click job value amount to view the Additional Information Form detail portlet.
Licensed Professional Info	This section displays licensed professionals associated with the application. Click the license number of a licensed professional to view the Professionals detail portlet.
Parcel No	This section displays parcels associated with the application. Click a parcel number to view the Parcel detail portlet.
Required Inspections	This section displays inspections public users must complete for Civic Platform to accept the application.
Structure	This section displays structures associated with the application.
Total Fee Assessed	This section displays the total amount of fees assessed to the application. Click total fee assessed to view the Fee detail portlet.
Total Fee Invoiced	This section displays the total amount of the fees invoiced to the application. Click total fee invoiced to view the Payment detail portlet.
Tracking #	This section displays the application tracking number.
Workflow Status	This section displays the workflow tasks associated with the application, including an Assigned To field. The current application status displays as a link, which enables you to view the Workflow Task portlet.

Configuring the Record Summary Tab

Users can view a summary of an application by clicking the Record Summary tab in a record list. The Record Summary tab displays read-only information; users cannot edit the content that displays.

Configuring the Record Summary Tab Inspection Section

The Inspections section displays pending, scheduled, and resulted inspections associated with the selected application.

When agency users access the Inspections section, they can review the inspection type, the scheduled date, the inspector, and the status for any pending, scheduled, or resulted inspection. Agency users can also click the link for any inspection that displays and view the associated inspection detail.

For a complete list of the fields that display in the Inspections section, see [Table 11: Application Summary Page Inspection Fields](#).

To display the Inspections section, you must first configure the Application Summary page. For instructions on how to configure the Application Summary page, see [Configuring the Application Summary Tab](#). You can remove the Inspections section from the Application Summary page using the Form Portlet Designer. For instructions on removing a display section from the Application Summary page, see [Designing Forms for Portlets](#).

Table 11: Application Summary Page Inspection Fields

Inspection Date	This field indicates the inspection date, and displays it in the Resulted subsection of the Inspections section.
Inspection Type	Displays the inspection category, such as electrical, insulation, or building.
Inspector	Displays the name of the inspector scheduled to conduct the inspection.
Resulted	Resulted inspections associated with the selected application display in this subsection. Inspection results must correspond to the Approved or Denied Result Type to display in this subsection.
Scheduled Date	This field displays in the Scheduled/Pending subsection and indicates the scheduled date for the inspection.
Scheduled/Pending	Scheduled or pending (requested) inspections associated with the selected application display in this subsection.
Status	This field displays in the Scheduled/Pending subsection and the Resulted subsection. In the Scheduled/Pending subsection, this field indicates whether a public user has scheduled or requested an inspection. In the Resulted subsection, this field indicates the result of an inspection, such as Approved or Denied.

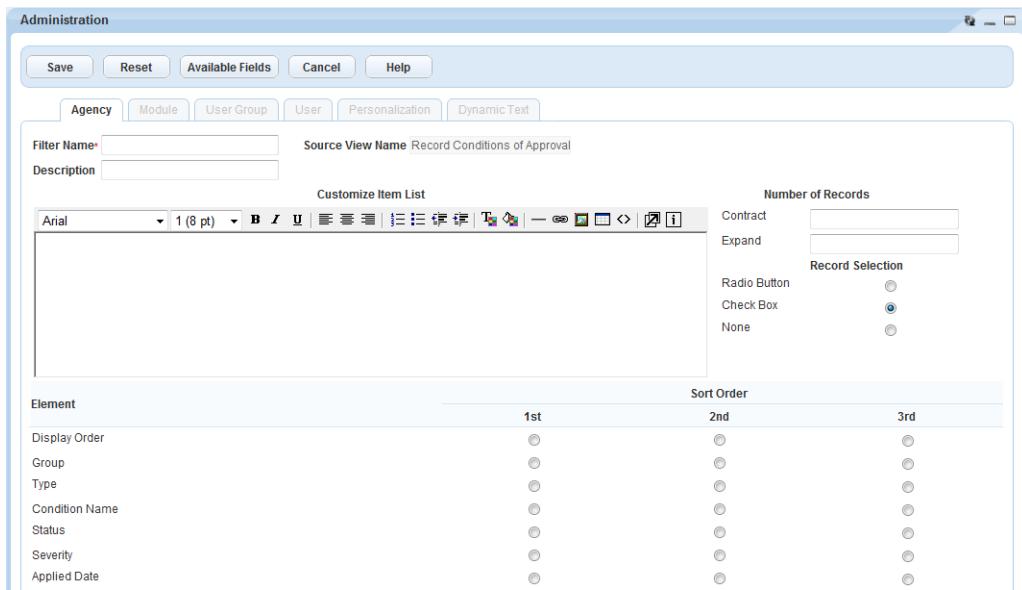
Configuring the Conditions of Approval Tab

Use the Form Portlet Designer to customize what information displays and how it appears on the Conditions of Approval tab for a record, an inspection, or a record set.

You can also decide which condition of approval fields appear as links in the Sort By area on the Conditions of Approval tab. By default, the Group, Priority, and Applied Date links are available in the Sort By area. Clicking a Sort By link sorts the conditions of approval by the corresponding field. Civic Platform sorts the conditions of approval by group, type, status type, severity, and then priority, if users do not click any of the links in the Sort By area.

To customize the Conditions of Approval tab

1. Access the Form Portlet Designer ([Accessing the Form Portlet Designer](#)).
2. Select one of these options from the **Portlet** drop-down list:
 - Record Conditions of Approval List (Conditions of Approval tab for a record)
 - Inspection Conditions of Approval List (Conditions of Approval tab for an inspection)
 - Set Conditions of Approval List (Conditions of Approval tab for a record set)
3. Click **New** and assign the view as described in [Designing Forms for Portlets](#). For example, select the level you need, such as Agency, and then Click **Submit**.
Civic Platform displays a layout editor.

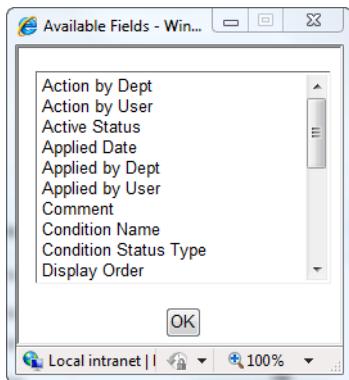


4. Complete the following fields.

- | | |
|------------------|--|
| Filter Name | Enter a descriptive name for the filter, so that you can identify it later if you need to locate it. After you save a form, the Filter Name displays in the Name column. |
| Description | Enter a descriptive name to help identify the purpose of the form. |
| Source View Name | The Source View Name is inactive; you cannot modify it. |

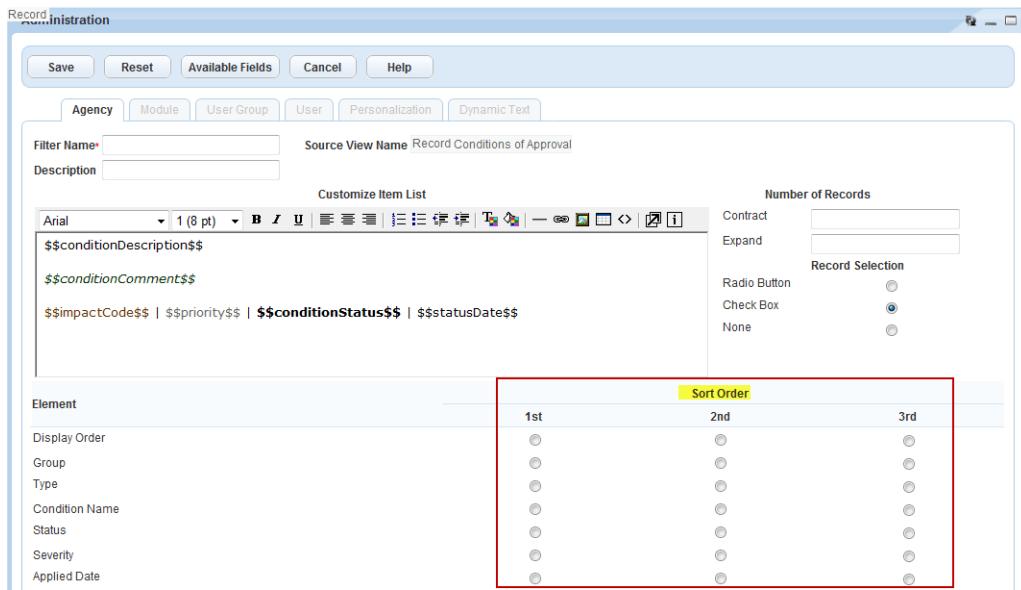
5. Click the **Available Fields** button.

Civic Platform displays the Conditions of Approval fields.



6. Double-click the field that you want to display for each condition of approval.

Civic Platform adds the field to the HTML editor as a predefined variable enclosed in the double dollar signs, for example, \$\$conditionDescription\$\$.



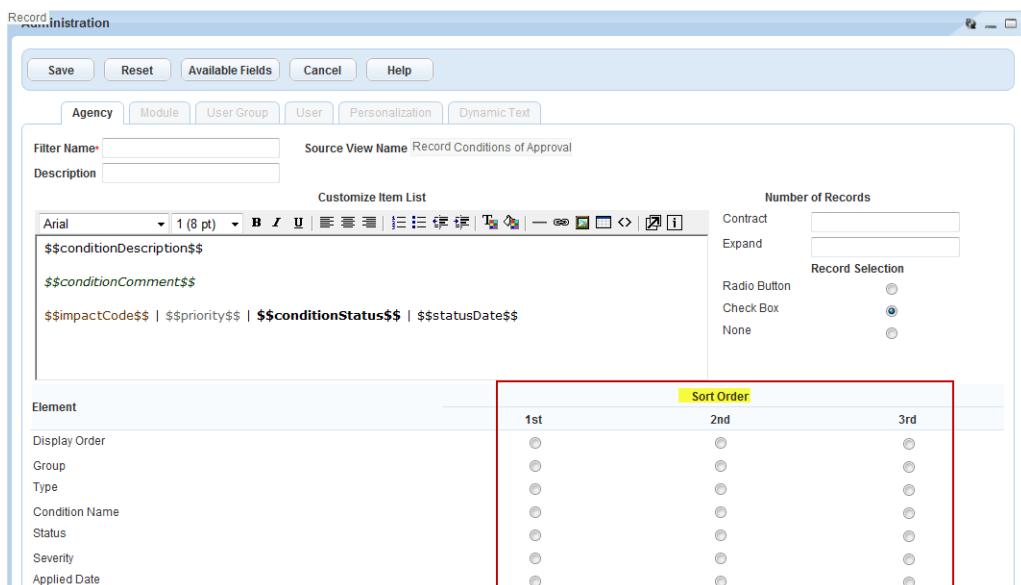
You can enter the predefined variables for the condition of approval fields into the HTML editor, as needed. For a list of the condition of approval fields and the corresponding variables, see [Table 12: Condition of Approval Variables](#). For a description of the condition of approval fields, see the *Civic Platform Online Help*, and search for “Conditions Form Fields.”

7. Use the HTML editor to format the fields, such as changing the font size and color.
8. In the Sort Order area, choose the options (do not choose display order – see note below) you want to appear as links in the Sort By area of the Conditions of Approval tab.



Note:

Do not select the Display Order field, as Civic Platform does not allow you to sort conditions of approval by display order.



Civic Platform displays the fields as links on the Conditions of Approval tab.

Record ID: ORE12-00000038

This record was placed on HOLD on 2012-05-10.
Condition BENENERGY - Rough energy inspection required Severity: Hold
Total conditions: 2 (Hold: 1, Required: 1)

[Learn more about this hold and how to resolve it](#)

Menu ▾ New Mark Selected as Met Change Priority ▾ Reset Delete View Log Help My QuickQueries --Select--

Go To ▾ Condition of Approval (6) Workflow Workflow History (1) Related Records Assets (0)

Summary: Pending(2) | Met(4) Sort By: Group Priority Applied Date Type to find

Conditions of Approval - 2 Pending 1 Met
Optional for Building/Building Permit/Commercial/Restaurant
BENENERGY
Rough energy inspection required Actions ▾
Pending | Critical | 05/10/2012

Required for Building/Building Permit/Commercial/Restaurant
BCE_ALM
Fire alarm permit completed Actions ▾
Pending | Low | 05/10/2012

B-BASEMENT
Basement inspections have been added. Actions ▾
Met | Medium | 05/10/2012

Table 12: Condition of Approval Variables

Field Name	Variable
Action by Dept	\$\$statusByUser.deptOfUser\$\$
Action by User	\$\$statusByUser.fullName\$\$
Active Status	\$\$auditStatus\$\$
Applied Date	\$\$issuedDate\$\$
Applied by Dept	\$\$issuedByUser.deptOfUser\$\$
Applied by User	\$\$issuedByUser.fullName\$\$
Comment	\$\$conditionComment\$\$
Condition Name	\$\$conditionDescription\$\$
Condition Status Type	\$\$conditionStatusType\$\$
Display Order	\$\$displayOrder\$\$ Note: Do not add the Display Order field or enter this variable into the HTML editor because the field is not visible on the Conditions of Approval tab.
Effective Date	\$\$effectDate\$\$
Expiration Date	\$\$expireDate\$\$
Group	\$\$conditionGroup\$\$
Long Comments	\$\$longComment\$\$
Priority	\$\$priority\$\$
Public Display Message	\$\$publicDisplayMessage\$\$
Record ID	\$\$capID\$\$
Resolution Action	\$\$resolutionAction\$\$
Severity	\$\$impactCode\$\$
Status	\$\$conditionStatus\$\$
Status Date	\$\$statusDate\$\$
Type	\$\$conditionType\$\$

Defining the Create New Menu

The Civic Platform console provides a Create New button on the toolbar that opens a drop-down menu of options for creating records or performing other operational tasks. Administrators determine the Create New button menu options by defining how many items display, which items display, and the order in which the items display in the Create New Objects administration portlet ([Figure 11: Create New Menu Drop-Down Menu](#)).

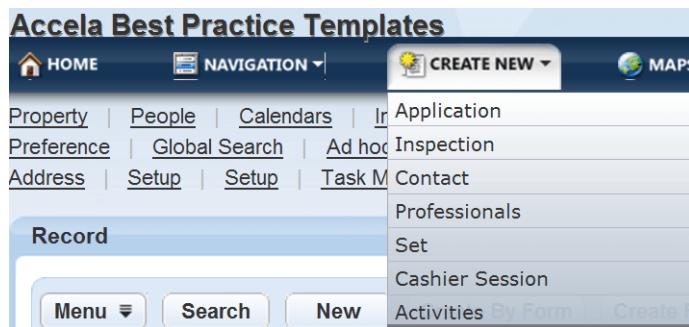


Figure 11: Create New Menu Drop-Down Menu

To define the Create New menu

1. Access the Setup Portlet ([Navigating to the Setup Portlet](#)).

2. Click **Agency Profile > Create New Objects**.

Civic Platform displays the Create New Objects administration portlet.

 A screenshot of the 'Create New Objects' administration portlet. The page title is 'Administration' and the sub-page title is 'Create New Objects'. There are buttons for Submit, Reset, and Help. The main content area has a table with columns for 'Objects', 'Display', and 'Display Order'.

Objects	Display	Display Order
Application	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Permit	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Inspection	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Invoice	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Contact	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Professionals	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Asset	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Task	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Work Order	<input checked="" type="radio"/> Yes <input type="radio"/> No	
License	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Service Request	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Case\Incident\Citation	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Set	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Structures & Establishments	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Time Accounting	<input checked="" type="radio"/> Yes <input type="radio"/> No	

a. In the **Display** column, select the option to indicate if an object displays in the Create New drop-down menu.

Choose **Yes** to include the object in the drop-down menu.

Choose **No** to hide the object as an option in the drop-down menu.

b. Enter a number in the **Display Order** column for each object you want to display in the drop-down menu. This number indicates the object position from top to bottom. The number 1 indicates the first position in the menu.

c. Click **Submit**.

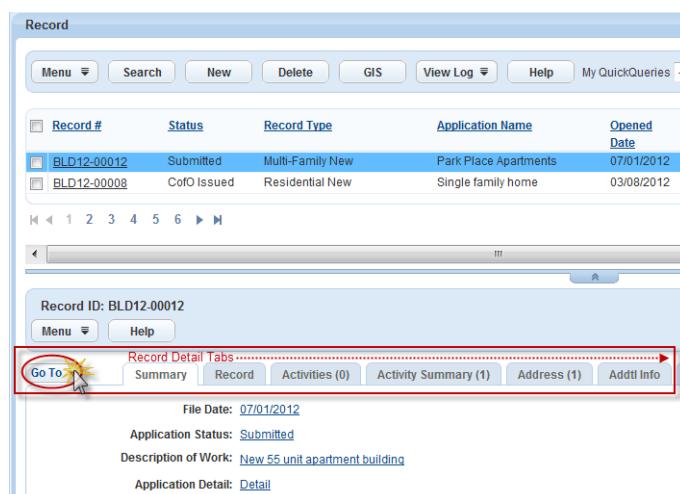
Customizing Go To Menus

You can group the record detail tabs into a drop-down menu called a Go To menu. The Go To menu provides a way to quickly navigate the record detail tabs.

To access the Go To menu

1. Locate a form portlet that contains a customized Go To menu.

Civic Platform displays the customized Go To menu tab.

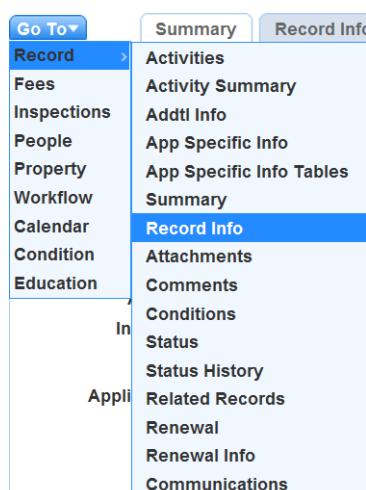


2. Click **Go To** and choose the appropriate option from the drop-down list.

The menu items in the drop-down list are the same as the record detail tabs listed across the portlet.

System administrators can define whether users have access to the **Go To** menu, record detail tabs, or both.

Civic Platform displays the detail portlet for the selected tab.



Creating Custom Portlets

You can configure custom link portlets that provide users with links to both external websites and to internal Civic Platform portlets.

Click a topic title below for full details.

Related Information

[Working with Link Portlets](#)

[Working with the Portlets Portlet](#)

Working with Link Portlets

Civic Platform provides 23 custom link portlets (three FAQ portlets and 20 Quicklinks portlets).



Figure 12: Sample Custom Link Portlet

To enable this functionality, first create the custom link portlet, then give users access to it by adding a main link to it ([Setting Up Your Console and Home Page](#)) on the console page.

To delete, edit, or create a link portlet

1. Access the Link Portlets portlet ([Accessing the Link Portlets Portlet](#)).

2. Create, edit, or delete a link portlet, as follows.

a. To create a new link portlet:

a. Click **New**.

b. Complete the fields in the **Portlet** tab.

 A screenshot of a web form titled 'Portlet'. At the top, there are four buttons: 'Menu', 'Submit', 'Reset', and 'Help'. Below these are two tabs: 'Portlet' (which is selected) and 'Links'. Under the 'Portlet' tab, there are two required fields: 'Portlet System Name *' (with a dropdown menu showing '-Select-') and 'Name *' (with an empty text input field). Below these fields is a 'Description' section containing a large text area with a scroll bar. At the bottom of the form is a link labeled 'check spelling'.

a. To delete an existing link portlet:



Note:

Removing a link portlet removes it from any primary tabs of Civic Platform that currently display the portlet. It also removes all links within the portlet.

a. Locate an existing list portlet by clicking on it in the Name column or by searching for it.

- b. Select the checkbox for the item to delete.
- c. Click **Delete**.
- b. To edit an existing list portlet:
 - a. Locate the portlet you want to edit.
 - b. Complete the fields in the **Portlet** tab ()�.
- 3. Enter information in the following fields:

Portlet System Name	The name of the link portlet.
Name	The name to display for the link portlet. By default, Civic Platform sets this to the Portlet System Name.
Description	The description of the portlet.
- 4. From the **Links** tab, delete a link, add a link, or edit a link.
 - Delete a link.
 1. Select the checkbox next to the link(s) you want to delete.
 2. Click **Delete**.
 - Edit an existing link.
 1. Click the hypertext link for the link you want to edit.
 2. Edit the field value(s).
 3. Click **Submit**.
 - Add a new link.
 1. Click **New**.
 2. Select the link type.
 3. Click **Submit**.
 4. Complete the fields by entering the name of the link you want to display and the target destination of the link (either a URL or portlet specification).
- 5. Click **Submit**.

Working with the Portlets Portlet

You use the Portlets portlet to specify which portlets you can add a link to from a link portlet.

To work with the Portlets portlet

1. Access the Portlets portlet ([Accessing the Portlets Portlet](#)).
2. Do any of the following:

- Create a portlet.
 1. Click **New**.
 2. Complete the fields (see [Table 13: Portlet Details](#)).
 - a. For the **Portlet URL** field, right-click anywhere in the portlet, and choose **Properties**.
The URL of the portlet displays in the Address (URL) field of the **Properties** window.
 - b. Enter the portlet URL in either of the following two formats:
The complete URL. For example, <https://sample.accela.com:32443/portlets/reports/adHocReport.do?>
The shortcut URL which omits the server address. For example: /portlets/reports/adHocReport.do?
 3. Click **Submit**.
- Edit an existing portlet.
 1. Click the link to the portlet you want to update.
 2. Update the fields (see [Table 13: Portlet Details](#)).
 - a. For the **Portlet URL** field, right-click anywhere in the portlet, and choose **Properties**.
The URL of the portlet displays in the Address (URL) field of the **Properties** window.
 - b. Enter the portlet URL in either of the following two formats:
The complete URL. For example, <https://sample.accela.com:32443/portlets/reports/adHocReport.do?>
The shortcut URL which omits the server address. For example: /portlets/reports/adHocReport.do?
 3. Click **Submit**.
- Delete a portlet.
 1. Select the checkbox next to the portlet(s) you want to delete.
 2. Click **Delete**.

Table 13: Portlet Details

FID	The Function Identification (FID) that Civic Platform uses to control access to the portlet. The FID setting controls access to the portlet and visibility of the link to the portlet. For example, if you are adding the Parcels portlet, you can enter 0005 in the field (FID 0005 controls the accessibility of the Parcels portlet). In a link portlet which contains the link to the Parcels portlet, the link is only visible to the users who have access permission to the Parcels portlet. For more information about portlet FIDs, see the <i>Accela Civic Platform Configuration Reference</i> .
Portlet Description	The description for the portlet. You can enter the name of the portlet and any other defining characteristics.
Portlet Icon	The icon to display for the portlet if you add the portlet to a flow diagram in the My Navigation portlet. The icon does not display for the portlet.
Portlet Page ID	NA. The field is no longer used.
Portlet URL	The URL for the portlet.

Filtering the Display of Data

Filters and queries enable users to find information easily and efficiently. You can configure filters and queries to display only the data that is relevant to the user in the context of their current business objective or use-case scenario.

Click a topic title below for full details.

Related Information

[Creating a Data Filter](#)

[Assigning a Data Filter](#)

[Removing a Data Filter Assignment](#)

[Data Filter Enabled Portlets](#)

[Managing Global QuickQueries](#)

[Managing User Defined QuickQueries](#)

[QuickQuery Enabled Portlets](#)

Creating a Data Filter

When you create a data filter, you specify the list that contains the fields you want to filter, the values for each field, and the users who have access to the filter.

To create a data filter

1. Access the Data Filter portlet ([Accessing the Data Filter Portlet](#)).

2. Select the portlet to which you want to apply the data filter.

3. Click **Submit**.

Civic Platform displays a list of the filters defined for that portlet.

4. Click **New** to create a new filter.

Civic Platform displays a blank form.

5. Enter a name and description to help you identify the purpose of the data filter.

6. In the **Search By** section, do the following:

a. Use the first drop-down to select the **Field** you want to filter.

**Note:**

The portlet you select at the beginning of this procedure determines which filter fields are available in this drop-down:

- The filter fields for the Record List portlet include all the fields that display in the record search form, any custom fields, Address/Parcel/Owner (APO) template fields*, and module.
*Please note that only record-searchable APO template attributes are available.
- The filter fields for the Reference Address (Parcel, or Owner) portlet include the address (parcel, or owner) fields, and APO template fields.
- The filter fields for other portlets are the fields that display in the search form for each portlet.
- If you select Custom Fields as the filter field in the drop-down, Civic Platform displays the Custom Fields groups page. Select a Custom Fields group code, and then find and click the desired field in the navigation tree to specify the field you want to filter.

The screenshot shows the 'Data Filter' tab selected. The 'Name' field contains 'PublicWorks/Certificate of Com'. The 'Search By' dropdown shows 'LIKE' selected, and the 'Value' field contains 'PublicWorks/Certificate'. The 'Resulting Query' pane shows a query structure: ASI Group Code -Select-. The 'ASI Field' node is expanded, showing options like Date_Balint, Number_Balint, Radio_Balint, Text_Balint, and Dropdown_Balint.

- If you select **Address Template**, **Parcel Template**, or **Owner Template** as the filter field in the drop-down, Civic Platform displays all the active template attributes. Click the desired attribute to specify the field you want to filter.

The screenshot shows the 'Data Filter' tab selected. The 'Name' field contains 'RecordType!'. The 'Search By' dropdown shows '!=', and the 'Value' field contains 'Building/ACA/Arm/Arm'. The 'Resulting Query' pane shows a query structure: Address Template -> Date_Balint, Number_Balint, Radio_Balint, Text_Balint, and Dropdown_Balint.

- Use the second drop-down to select the **Relational Operator** you want to use. See [Relational Operators](#).
- In the third field enter the **Value** you want to compare the field against. The value must match a value in your agency's database. You can click the button to the right of the field and select a variable from the Variable picker, or enter the variable into the field manually.

See [Data Filter Parameters](#).



- If you select a user name field such as Requestor, Civic Platform displays three fields where you can specify the first, middle, and last name of a person. See [User Name List Portlets and Search Fields](#).

However, if you pick a variable as the search criteria, Civic Platform turns the three fields into a read-only Full Name field and populates the field with the specified variable.

- d. If you are filtering additional fields, enter the **logical operator** in the fourth field to determine how you want to combine the field-level filters. See [Logical Operators](#).
7. If you are filtering more than one new field:
 - a. Click the **New Field** button located at the top of the portlet.
Civic Platform adds a condition to the Search By section for the additional field.
 - b. Repeat for every new field.
8. To delete a field from your query, select the field and click **Delete Field**.
9. Click the **Preview SQL** button to view the SQL in the Resulting Query text field.

10. Click **Submit**.

Civic Platform displays a message informing you whether you created the data filter successfully, and updates the data filter list.

Table 14: Relational Operators

Operator	Description
!=	Not equal to
<	Less than
<=	Less than or equal to
=	Equal to
>	Greater than
>=	Greater than or equal to

Operator	Description
IS NOT NULL	Used to query fields that contain any value, regardless of what that value is. When you use this operator, do not use a variable in the third field.
IS NULL	Used to query fields that do not have a value. For example, you might set up a data filter to query for records associated with a certain department, but not to any individual within the department. When you use this operator, do not use a variable in the third field.
Like	The alphabetic character field values that you want to include in the filter or query contain a string (alphabetic characters). For example, if you want to set up a query to list all contacts with the string "Jeff" in their email addresses, choose "Like" as the relational operator and enter "Jeff" as the value.

Table 15: User Name List Portlets and Search Fields

List Portlet	"Search By" Field
AMS Asset CA List	Inspector
AMS PM Schedule Log List	Processed By Staff
Inspection Conditions of Approval List	<ul style="list-style-type: none"> • Action by User • Applied by User
Inspection List	<ul style="list-style-type: none"> • Inspection Contact Name • Inspector • Requestor
My Workflow Task List	<ul style="list-style-type: none"> • Action By (Staff) • Assigned to Staff
Record Conditions of Approval List	<ul style="list-style-type: none"> • Action by User • Applied by User
Record Inspection List	<ul style="list-style-type: none"> • Inspection Contact Name • Requestor
Set Conditions of Approval List	<ul style="list-style-type: none"> • Action by User • Applied by User

Table 16: Data Filter Parameters

Variable	Name	Description
\$\$DEPARTMENT\$\$	Department	The department to which the current user belongs.
\$\$GAUSER ID\$\$	User ID	The logged in user's ID.
\$\$USERFULLNAME\$\$	User Full Name	The logged in user's full name.
\$\$GROUP\$\$	Group	The logged in user's user group.
\$\$MODULE\$\$	Module	The name of the module for which the alert you created the alert.
\$\$ORGANIZATION\$\$	Organization	All organizations. A Citizen Access term.
\$\$OWNORGANIZATION\$\$	Own Organization	The logged in citizen user's organizations. A Citizen Access term.
\$\$OWNLICENSE\$\$	Own License	The logged in citizen user's licenses. A Citizen Access term.
\$\$PUBLICUSER_EMAIL\$\$	Public User's Email	The logged in citizen user's email. A Citizen Access term.
\$\$SERV_PROV_CODE\$\$	Service Provider Code	The logged in user's agency code

Variable	Name	Description
\$\$TODAY+/-#\$\$	Today	Today's date, based on the workstation's system clock. You can use this variable parameter in calculations to specify a date range. For example, you could enter \$\$Today-7\$\$ to query for all records over the last week.
\$\$TODAY+n\$\$	Today +n	Date range beginning with today's date. For example, you could enter \$\$Today-7\$\$ to query for all records over the last week.
\$\$USERID\$\$	User ID	The ID of the user currently logged on to Civic Platform.

Table 17: Logical Operators

Operator	Description
And	Use this logical boolean operator to display values included only in multiple fields (results in a smaller list of matches).
Or	Use this logical boolean operator to display values included in one field or another (results in a larger list of matches).

Editing a Data Filter

This section describes how to edit the data filter information that displays on the Data Filter tab.

To edit a data filter

1. Access the Data Filter portlet ([Accessing the Data Filter Portlet](#)).
2. Select the view with the data filter you want to modify.
3. Click **Submit**.

Civic Platform displays a list of the filters defined for the selected view.

The screenshot shows the Civic Platform interface with the 'Administration' menu bar. Below it is the 'Data Filter' portlet. The portlet has a toolbar with 'Menu', 'Search', 'New', 'Delete', and 'Help' buttons. The main area displays a table with two columns: 'Name' and 'Description'. There are three filter entries listed:

Name	Description
PublicWorks/Certificate of Compliance	
RecordType!	

4. In the Name column, click the link of the filter you want to edit.

Civic Platform displays the filter details in the record tab.

The screenshot shows the Civic Platform interface with the 'Administration' menu bar. Below it is the 'Data Filter' portlet. The portlet has a toolbar with 'Submit', 'Reset', 'New Field', 'Delete Field', 'Preview SQL', and 'Help' buttons. The main area displays a table with two columns: 'Name' and 'Description'. The 'Name' column contains a single entry: 'RecordType!'. The 'Description' column is empty. Below the table is a 'Search By' section with a dropdown menu set to 'Building/ACA/Amv/Amy/Test'. A sidebar titled 'Resulting Query' lists several filter options under a 'Address Template' category:

- Date_Balint
- Number_Balint
- Radio_Balint
- Text_Balint
- Dropdown_Balint

5. Modify the following fields if you want:

Name	Enter a brief name to identify the data filter.
Description	Enter a description to help you identify the purpose of the data filter.

6. Review and edit the Search By section:

- To delete a field from your query, select the field and click **Delete Field**.
- If you want to modify the filter condition for a field, find the target field, select the new Relational Operator you want to use for the field, and enter the new Value that you want to compare the field against.
- If you want to add a new field, enter the Logical Operator in the last field to determine how you want to combine the field-level filters, click the **New Field** button, and perform the following:
 - Use the first drop-down to select the Field you want to filter,
 - Use the second drop-down to select the Relational Operator you want to use.
 - In the third field enter the Value that you want to compare the field against. The value must match a value in your agency's database. You can click the button to the right of the field and select a variable from the Variable picker, or enter the variable into the field manually.
 - Repeat the preceding step for every new field.

7. Click the **Preview SQL** button to view the SQL in the Resulting Query text field.

8. Click **Submit**.

Civic Platform displays a message informing you whether you updated the data filter successfully.

Deleting a Data Filter

This section describes how to remove a data filter from Civic Platform.

To remove a data filter

1. Access the Data Filter portlet ([Accessing the Data Filter Portlet](#)).

2. Select the view with the data filter you want to delete.

3. Click **Submit**.

Civic Platform displays a list of the filters defined for the selected view.

Name	Description
PublicWorks/Certificate of Compliance	
RecordType!	

4. Select each data filter you want to delete.

5. Click **Delete**.

Civic Platform updates the data filter list for the selected view.

Assigning a Data Filter

You can assign data filters to individual users as well as entire user groups to limit what field values they can see in their list views.

By default, Civic Platform applies the primary filter which you specify to any portlet. If you defined multiple filters for a portlet, authorized users can choose which filter to apply to the view. Only one filter can apply to a portlet at any given time. If you do not give a user the option to choose from a list of available data filters for a portlet, Civic Platform automatically applies the primary data filter you have defined for that portlet and assigned to that user.

To assign a data filter

1. Access the Data Filter portlet ([Accessing the Data Filter Portlet](#)).
 2. Select the portlet with the data filter you want to modify.
 3. Click **Submit**.
- Civic Platform displays a list of the filters defined for the selected portlet.
4. In the **Name** column, click the link of the filter you want to assign (click **Search** if you do not see the filter you want).
 5. Click the **Recipients** tab.

Civic Platform displays the users and user groups you assigned the filter to.

Recipient Type	Recipient Key
<input type="checkbox"/> Module	<input type="checkbox"/> Building
	<input type="checkbox"/> RecordType!

6. Click **Assign Module**, **Assign Group**, or **Assign User** to assign recipients to the filter.
7. If you want the data filter to be the primary data filter for the selected user group or user, do the following:

- a. Click the Recipient Key link next to the user group or user you want to make the primary.

Civic Platform displays the Primary information.

Name	Primary
PublicWorks/Certificate of Compliance	<input type="radio"/>
RecordType!	<input type="radio"/>

- b. Select the **Primary** option.
- c. Click **Submit**.

Removing a Data Filter Assignment

This section describes how to remove a data filter from a user or user group. If a user or group has had a particular data filter assigned to limit their access to information, you can remove that filter if it no longer applies.

To remove a data filter assignment

1. Access the Data Filter portlet ([Accessing the Data Filter Portlet](#)).
2. Select the portlet with the data filter you want to modify.
3. Click **Submit**.
Civic Platform displays a list of the filters defined for the selected portlet.
4. In the **Name** column, click the link to the filter with the recipient you want to remove (click **Search** if you do not see the filter you want).
5. Click the **Recipients** tab.
Civic Platform displays a list of recipients.
6. Select each recipient you want to remove from the list.
7. Click **Delete**.
Civic Platform displays a confirmation message and updates the recipient list.

Data Filter Enabled Portlets

This list details the administration portlets where you can set up and use data filters.

- AMS Asset Attribute Table List: The Attribute Table list portlet.
- AMS Asset Template List: The Attribute Template list portlet.
- AMS Asset Type List: The Asset Type list portlet.
- AMS Attribute List: The Attribute list portlet.
- AMS Condition Assessment List: The Condition Assessment administration list portlet.
- AMS Cost Group List: The Cost Group list portlet.
- AMS Cost Item List: The Cost Item list portlet.
- AMS Part Contact List: The Part Contact list portlet.
- AMS Part Location List: The Part Location list portlet.
- AMS RefRating List: The Rating Type list portlet.
- AMS WO Task Definition List: The Work Order Task list portlet.
- AMS Work Order Template List: The Work Order Template list portlet.
- StructEstabl Type List: The Structure & Establishment Types portlet.

This list details the daily user portlets where you can set up and use data filters:

- Citizen Access Record List: The record list in Citizen Access.
- AMS Asset CA List: The Asset Condition Assessment list portlet.

- AMS Asset Data List: The Assets list portlet.
- AMS Asset Work Order List: The Work Order tab in the Assets portlet.
- AMS Part Inventory List: The Part Inventory list portlet.
- AMS Part Transaction List: The Part Transaction tab in the Part Inventory portlet.
- AMS PM Schedule List: The PM Schedules list portlet.
- AMS Work Order Asset List: The Assets tab in the Work Orders portlet.
- Batch Invoice List: The Invoices list portlet.
- Batch Job List: The Batch Jobs list portlet.
- Contact Record List: The Record List tab in the Contacts portlet.
- Global Search Record List: The Record List tab in the Global Search portlet.
- Inspection List: The Inspections list portlet, and the Inspections tab in the My Tasks portlet.
- My Document Task List: The Document Review Tasks tab in the My Tasks portlet.
- My Workflow Task List: The Workflow Tasks tab in the My Tasks portlet.
- Point of Sale Transaction List: The Point of Sale list portlet.
- Record List: The Record list portlet.
- Record Set Member List: The Set Members tab in the Set: Records portlet.
- Record Status History List: The Application History tab in the Record portlet.
- Reference Address List: The Addresses list portlet.
- Reference Contact List: The Contacts list portlet.
- Reference Owner List: The Owners list portlet.
- Reference Parcel List: The Parcels list portlet.
- Reference Professional List: The Professionals list portlet.
- Reference StructEstabl List: The Structures & Establishments list portlet.
- Related Record List: The Related Records tab in the Record portlet.
- Trust Account List: The Trust Account list portlet.

QuickQueries

A QuickQuery is a search predefined by an administrator that helps users to quickly access a list of items. For example, you can set up a QuickQuery that refines a list of records to show only those records assigned to a certain department. A QuickQuery does not display fields or values a data filter excludes. For more information about data filters, see [Filtering the Display of Data](#).

You can filter data for any field name in a list portlet. You must designate the modules, groups, or users that can access each Global QuickQuery you create. Global QuickQueries not assigned to the user do not appear in the user's My QuickQueries drop-down list in the list portlet. If you set up multiple queries for a portlet, users can add any of those queries to their My QuickQueries drop-down list, and specify one of them as a default QuickQuery.

Multiple daily users can assign a QuickQuery the same name. Civic Platform differentiates these QuickQueries by the user's login name. For example, John Q. Smith and Ann Jensen can both create a query called "Projects Due Today." A user or administrator who wants to create two QuickQueries with the same name on the same login account must differentiate the two. For example, "Opened Today with Balance (Global)" and "Opened Today with Balance (My QQ)."

Managing Global QuickQueries

Global QuickQueries are QuickQueries you define for your Civic Platform users. Civic Platform gives you the flexibility to assign QuickQueries to every user in the agency, make them available to a specific group only, or even limit them to an individual user. If needed, you can edit, delete, and un-assign QuickQueries previously assigned.

Topics

- [Creating a Global QuickQuery](#)
- [Editing a Global QuickQuery](#)
- [Deleting a Global QuickQuery](#)
- [Assigning a QuickQuery](#)
- [Removing a QuickQuery](#)

Creating a Global QuickQuery

For each portlet list, you can create any number of QuickQueries. For example, in the Building portlet, you might want to sort the records by the Record ID and the street name.

You also have the option to designate one of the Global QuickQueries as the primary QuickQuery within each portlet. You can only assign one primary Global QuickQuery at a time. If the daily user assigns a user defined QuickQuery as primary, Civic Platform overrides the primary Global QuickQuery with the user's choice.

To create a QuickQuery

1. Access the Global QuickQueries portlet ([Accessing the Global QuickQueries Portlet](#)).
2. From the portlet drop-down list, choose the portlet for which you want to create a query.
3. Click **Submit**.

Civic Platform displays a list of the queries defined for that view.

Administration	
Global QuickQueries	
<input type="button" value="Menu"/> <input type="button" value="Search"/> <input type="button" value="New"/> <input type="button" value="Delete"/> <input type="button" value="Help"/>	
◀ ▶ 1 2 3 4 ▶ ▶	
Name	Description
<input type="checkbox"/> AA Projects-Active	Accela Projects
<input type="checkbox"/> Active Current Planning Projects	DR, ER, IR, P, PB, Z files; In Progress or Waiting
<input type="checkbox"/> Applications Created Today	Default
<input type="checkbox"/> Bal Due (Bld-Apps)	Building apps with a balance due
<input type="checkbox"/> Bal Due (BLD-Permits)	Building Permits with a balance due
<input type="checkbox"/> Balance Due (expired)	
<input type="checkbox"/> Balance Due (PLN)	All Planning Module Files with a Balance Due
<input type="checkbox"/> Balance Due (WST)	Water Supply Files with a Balance Due
<input type="checkbox"/> Balance Due (WST) Complete	Water Supply Files with a Balance Due and Complete Status
<input type="checkbox"/> BLD Formal Review	Formal Review Not Started

4. Click New.

Civic Platform displays a blank form in the secondary tab.

<input type="button" value="Submit"/> <input type="button" value="Reset"/> <input type="button" value="New Field"/> <input type="button" value="Delete Field"/> <input type="button" value="Preview SQL"/> <input type="button" value="Help"/>	
<input type="radio"/> Quick Query <input type="radio"/> Recipient	
Name * <input type="text"/>	Description <input type="text"/>
Search By * <input type="checkbox"/> <input type="text"/> --Select-- <input type="button" value="▼"/> <input type="radio"/> <input type="text"/> <input type="button" value="▼"/> <input type="checkbox"/> <input type="text"/> <input type="button" value="AND"/> <input type="button" value="▼"/>	
Resulting Query <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>	

5. Complete these fields:

Name Enter a brief name to identify the QuickQuery.

Description Enter a description to help you identify the purpose of the QuickQuery.

6. In the Search By section:

- a. Use the first drop-down to select the **Field** you want to filter.



Note:

The portlet you select sets the filter fields available in this drop-down:

- The filter fields for Record List portlet include all the record fields that display in the record search form, Application-Specific Info, Address Template, Owner Template, Parcel Template, and Module Name.
- The filter fields for the Reference Address (Parcel, or Owner) Portlet include the address (parcel, or owner) fields, and Address Template (Parcel Template, or Owner Template).
- The filter fields for other portlets are the fields that display in the search form of each portlet.

- If you select **Application-Specific Info (ASI)** as the filter field in the drop-down, Civic Platform displays all the ASI groups.

Name *
PublicWorks/Certificate of Com

Description

Search By *

Resulting Query

ASI Group Code
-Select-
ASI Field

Select an ASI group code, and then find and click the desired ASI field in the **ASI Field** navigation tree to specify the field you want to filter.

- If you select **Address Template**, **Parcel Template**, or **Owner Template** as the filter field in the drop-down, Civic Platform displays all the active template attributes. Click the desired attribute to specify the field you want to filter.

Submit Reset New Field Delete Field Preview SQL Help

Data Filter Recipient

Name *
RecordType!

Description

Search By *

Resulting Query

ASI Group Code
-Select-
Address Template
Date_Balint
Number_Balint
Radio_Balint
Text_Balint
Dropdown_Balint

- Use the second drop-down to select the **Relational Operator** you want to use. See [Table 18: Relational Operators](#).
- In the third field, enter the Value that you want to compare the field against. The value must match a value in your agency's database. You can click the button to the right of the field and select a variable from the Variable picker, or enter the variable into the field manually.

See [Table 19: QuickQuery Parameters](#)



- If you select a user name field such as Requestor, Civic Platform displays three fields where you can specify the first, middle, and last name of a person. See [Table 15: User Name List Portlets and Search Fields](#).

The screenshot shows the 'Search By' section of a search form. It includes fields for 'Requestor' (set to 'John'), 'Inspector' (set to '\$\$USERIDS\$\$'), and 'Inspection Type' (set to 'Commerical Building'). Red arrows point from the labels 'First Name', 'Middle Name', and 'Last Name' to the respective input fields for 'Requestor', 'Inspector', and 'Inspection Type'.

However, if you pick a variable as the search criteria, Civic Platform turns the three fields into a read-only Full Name field and populates the field with the specified variable.

- If you are filtering additional fields, enter the **Logical Operator** in the fourth field to determine how you want to combine the field-level filters. See [Table 20: Logical Operators](#).

7. If you are querying more than one field:

- Click the **New Field** button located at the top of the portlet.

Civic Platform adds a condition to the Search By section for the additional field.

The screenshot shows the 'Search By' section of a search form. It includes fields for 'Record Type' (set to 'Building/Administration/IT Project'), 'Status' (set to 'Active'), 'Status' (set to 'Pending'), 'Status' (set to 'On Hold'), 'Status' (set to 'Waiting for CRC'), and a dropdown menu ('--Select--'). Red arrows point from the labels 'Record Type', 'Status', 'Status', 'Status', 'Status', and 'Resulting Query' to the respective input fields and dropdown menus.

- Repeat for each new field.

8. To delete a field from your query, select the field and click **Delete Field**.

9. Click the **Preview SQL** button to view the SQL in the Resulting Query text field.

Submit Reset New Field Delete Field Preview SQL Help

Quick Query Recipient

Name *	Description
AA Projects-Active	Accela Projects

Search By *

(Record Type = 'Building/Administration/IT Projects/Accela') AND ((Status = 'Active') OR (Status = 'Pending') OR (Status = 'On Hold') OR (Status = 'Waiting for CRC'))

Resulting Query

```
(Record Type = 'Building/Administration/IT Projects/Accela') AND ((Status = 'Active') OR (Status = 'Pending') OR (Status = 'On Hold') OR (Status = 'Waiting for CRC'))
```

10. Click Submit.

Civic Platform informs you if you created the QuickQuery successfully and updates the Global QuickQueries list.

11. To set the QuickQuery as the primary QuickQuery for the portlet:

- Click the **Recipient** tab.

Civic Platform displays a list of Recipients.

Menu Assign Module Assign Group Assign User Delete Help

Quick Query Recipient

Recipient Type	Recipient Key
Staff	SAC/DSD/ADMIN/NA/NA/NA/Rebecca J Blair, [Module: Building]

- Click the **Recipient Key** link.

Civic Platform displays the Recipient Key list.

Recipient Key:

Name Primary

AA Projects-Active

- Select the **Primary** option.

- Click **Submit**.

Table 18: Relational Operators

Operator	Description
!=	Not equal to
<	Less than
<=	Less than or equal to
=	Equal to
>	Greater than
>=	Greater than or equal to

Operator	Description
IS NOT NULL	Used to query fields that contain any value, regardless of what that value is. When you use this operator, do not use a variable in the third field.
IS NULL	Used to query fields that do not have a value. For example, you might set up a data filter to query for records assigned to a certain department, but not to any individual within the department. When you use this operator, do not use a variable in the third field.
Like	The field values that you want to include in the filter or query contain a string of alphabetic characters. For example, if you want to set up a query to list all contacts with the string “Jeff” in their email addresses, choose “Like” as the relational operator and enter “Jeff” as the value.

Table 19: QuickQuery Parameters

Variable	Name	Description
\$\$DEPARTMENT\$\$	Department	The department to which the current user belongs.
\$\$GAUSER_ID\$\$	User ID	The logged in user's ID.
\$\$GROUP\$\$	Group	The logged in user's user group.
\$\$MODULE\$\$	Module	The name of the module for which you created the alert.
\$\$ORGANIZATION\$\$	Organization	All organizations. A Citizen Access term.
\$\$OWNORGANIZATION\$\$	Own Organization	The logged in citizen user's organizations. A Citizen Access term.
\$\$OWNLICENSE\$\$	Own License	The logged in citizen user's licenses. A Citizen Access term.
\$\$PUBLICUSER_EMAIL\$\$	Public User's Email	The logged in citizen user's email. A Citizen Access term.
\$\$SERV_PROV_CODE\$\$	Service Provider Code	The logged in user's agency code
\$\$TODAY+/-#\$\$	Today	Today's date, based on the workstation's system clock. You can use this variable parameter in calculations to specify a date range. For example, you could enter \$\$Today-7\$\$ to query for all records over the last week.
\$\$USERID\$\$	User ID	The ID of the user currently logged on to Civic Platform.

Table 20: Logical Operators

Operator	Description
And	Use this logical (boolean) operator to display values included only in multiple fields (produces a smaller list of matches).
Or	Use the logical (boolean) operator to display values included in either one or other of the fields (produces a larger list of matches).

Editing a Global QuickQuery

This section describes how to edit information associated with a QuickQuery, including how to designate a QuickQuery as the primary QuickQuery for the portlet.

To edit a QuickQuery

1. Access the Global QuickQueries portlet ([Accessing the Global QuickQueries Portlet](#)).
2. From the Portlet drop-down list, choose the portlet for which you want to edit a query.

3. Click **Submit.**

Civic Platform displays a list of the queries defined for that view.

4. From the list of queries, click the link in the **Name column of the query you want to edit.**

Civic Platform displays the query details in the secondary portlet.

5. Modify these fields if you want:

Name Enter a brief name to identify the QuickQuery.

Description Enter a description to help you identify the purpose of the QuickQuery.

6. Review and edit the Search By section:

a. To delete a field from your query, select the field and click **Delete Field.**

b. If you want to modify the filter condition for a field, find the target field, select the new Relational Operator you want to use for the field, and enter the new Value that you want to compare the field against.

c. If you want to add a new field, enter the Logical Operator in the last field to determine how you want to combine the field-level filters, click the **New Field button, and perform the following:**

a. Use the first drop-down to select the Field you want to filter,

b. Use the second drop-down to select the Relational Operator you want to use.

c. In the third field, enter the Value that you want to compare the field against. The value must match a value in your agency's database. You can click the button to the right of the field and select a variable from the Variable picker, or enter the variable into the field manually.

d. Repeat the preceding step for every new field.

For more information on adding new fields in **Search By**, see [Creating a Global QuickQuery](#).

7. If you are querying more than one field, click the **New Field button located at the top of the portlet.**

Civic Platform adds a condition to the Search By section for the additional field.

8. Repeat for each new field.

To delete a field from your query, select the field and click **Delete Field**.

9. Click the **Preview SQL button to view the SQL in the Resulting Query text field.**

10. Click **Submit.**

Civic Platform updates the Global QuickQueries list.

11. To set the QuickQuery as the primary QuickQuery for the portlet:

a. Click the **Recipient tab.**

Civic Platform displays a list of Recipients.

Recipient Type	Recipient Key
Staff	SAC/DSD/ADMIN/NA/NA/NA/Rebecca J Blair, [Module: Building]

b. Click the **Recipient Key link.**

Civic Platform displays the Recipient Key list.

Name	Primary
AA Projects-Active	

- c. Select the **Primary** option.
- d. Click **Submit**.

Deleting a Global QuickQuery

This section describes how to remove a QuickQuery from your system.

To delete a QuickQuery

1. Access the Global QuickQueries portlet ([Accessing the Global QuickQueries Portlet](#)).
2. Select the portlet with the query you want to delete.
3. Click **Submit**.
Civic Platform displays a list of the queries defined for that portlet.
4. From the list of queries, select each query you want to delete.
5. Click **Delete**.
Civic Platform updates the Global QuickQueries list.

Assigning a QuickQuery

You can assign QuickQueries to individual users, to entire groups, or to modules in the Recipient tab of the Global QuickQueries portlet ([Navigating to the Setup Portlet](#)). After you assign a query to a user or group, those users can see the query in their My QuickQuery drop-down list in the toolbar for the applicable list portlet. If you created multiple queries for that portlet, the user can select a primary QuickQuery to apply to the portlet.

For more information, see [Setting Up Security Policies](#).

Removing a QuickQuery

This section describes how to remove a QuickQuery from a user or user group.

To remove a QuickQuery from a user or user group

1. Access the Global QuickQueries portlet ([Accessing the Global QuickQueries Portlet](#)).
2. Select the portlet with the QuickQuery you want to modify.
3. Click **Submit**.
Civic Platform displays a list of the QuickQueries defined for the selected portlet.
4. In the **Name** column, click the link to the QuickQuery with the recipient you want to remove.
If you do not see the QuickQuery you want, click Search.
Civic Platform displays the QuickQuery details in the secondary portlet.
5. Click the **Recipients** tab.
Civic Platform displays a list of recipients.

6. Select each recipient you want to remove from the list.

7. Click **Delete**.

Civic Platform displays a confirmation message and updates recipient list.

Managing User Defined QuickQueries

If you allow your agency Civic Platform users to create their own personal QuickQueries, known as My QuickQueries, you can manage them through the Administration portlet. You can search for user defined QuickQueries, edit them (if permitted), and delete them as needed.

Multiple daily users can assign a QuickQuery the same name. Civic Platform differentiates these QuickQueries by the user's login name. For example, John Q. Smith and Ann Jensen can both create a query called "Projects Due Today." A user or administrator who wants to create two QuickQueries with the same name on the same login account must differentiate the two. For example, "Opened Today with Balance (Global)" and "Opened Today with Balance (My QQ)."

For more information about defining user QuickQueries, see "Understanding QuickQueries" in the *Accela Civic Platform User Guide*.

Topics

- [Searching for User Defined QuickQueries](#)
- [Editing User Defined QuickQueries](#)
- [Deleting User Defined QuickQueries](#)

Searching for User Defined QuickQueries

Depending on the size of your agency, you might have hundreds of user defined QuickQueries that agency users create. Civic Platform enables you to search for QuickQueries created by users so you can manage them as needed.

To search for user defined QuickQueries

1. Access the My QuickQueries portlet ([Accessing the My QuickQueries Portlet](#)).
2. Select the view for which you are creating the query.
3. Click **Submit**.

Civic Platform displays a list of the queries defined for that view.

The screenshot shows a web-based administration interface for 'Global QuickQueries'. At the top, there's a menu bar with 'Administration', 'Menu', 'Search', 'New', 'Delete', and 'Help' buttons. Below the menu is a navigation bar with icons for back, forward, and page numbers (1-4). The main area is titled 'Global QuickQueries' and contains a table with two columns: 'Name' and 'Description'. The table lists several queries:

Name	Description
AA Projects-Active	Accela Projects
Active Current Planning Projects	DR, ER, IR, P, PB, Z files; In Progress or Waiting
Applications Created Today	Default
Bal Due (Bld-Apps)	Building apps with a balance due
Bal Due (BLD-Permits)	Building Permits with a balance due
Balance Due (expired)	
Balance Due (PLN)	All Planning Module Files with a Balance Due
Balance Due (WST)	Water Supply Files with a Balance Due
Balance Due (WST) Complete	Water Suply Files with a Balance Due and Complete Status
BLD Formal Review	Formal Review Not Started

4. Click **Search**.

Civic Platform displays a search form.

5. Complete any fields that display to search for a QuickQuery.

6. Click **Submit**.

Civic Platform displays a list of queries that match your search criteria.

Editing User Defined QuickQueries

Civic Platform enables you to edit QuickQueries created by users so you can manage them as needed.

To edit user defined QuickQueries

1. Access the My QuickQueries portlet ([Accessing the My QuickQueries Portlet](#)).

2. Select **Record List** from the Portlet drop-down list, then click **Submit**.

Civic Platform displays the list of User Created QuickQueires.

3. Locate and select the QuickQuery you want to modify.

Civic Platform displays the Query with all fields editable.

The screenshot shows the 'My QuickQueries' portlet interface. At the top, there are buttons for 'Submit', 'Reset', 'New Field', 'Delete Field', 'Preview SQL', and 'Help'. Below these are tabs for 'Quick Query' (which is selected) and 'Recipient'. The main area has two sections: 'Name' and 'Description'. The 'Name' field contains 'AA Projects-Active' and the 'Description' field contains 'Accela Projects'. Below this is a section titled 'Search By' with six dropdown menus for 'Record Type', 'Status', 'Status', 'Status', 'Status', and a placeholder '-Select-'. To the right of each dropdown is a comparison operator ('=', 'LIKE', 'BETWEEN', etc.), a value field, and a logical operator ('AND', 'OR'). At the bottom, there's a section titled 'Resulting Query' with a large text area.

4. Modify any of the fields as necessary
5. Click **Submit**.

Deleting User Defined QuickQueries

You can delete user defined QuickQueries as needed. You might need to delete a user defined QuickQuery, for example, if an employee changes departments and you no longer want them to have access to data they for which they created a QuickQuery. You might also want to delete QuickQueries for employees who are no longer at your agency, to help keep unnecessary data out of your database.

To delete user defined QuickQueries

1. Access the My QuickQueries portlet ([Accessing the My QuickQueries Portlet](#)).
2. Select the view for which you are creating the query.
3. Click **Submit**.
Civic Platform displays a list of the queries defined for that view.
4. From the list of queries, select each query you want to delete.
If you do not see the QuickQuery you want, you can search for it by clicking the Search button located in the toolbar.
5. Click **Delete**.
Civic Platform updates the Global QuickQueries list.

QuickQuery Enabled Portlets

This list details the administration portlets where you can set up and use global or user-defined quickqueries.

- AMS Asset Attribute Table List: The Attribute Table list portlet.
- AMS Asset Template List: The Attribute Template list portlet.
- AMS Asset Type List: The Asset Type list portlet.
- AMS Attribute List: The Attribute list portlet.
- AMS Condition Assessment List: The Condition Assessment administration list portlet.
- AMS Cost Group List: The Cost Group list portlet.
- AMS Cost Item List: The Cost Item list portlet.
- AMS Part Contact List: The Part Contact list portlet.
- AMS Part Location List: The Part Location list portlet.
- AMS RefRating List: The Rating Type list portlet.
- AMS WO Task Definition List: The Work Order Task list portlet.
- AMS Work Order Template List: The Work Order Template list portlet.

- StructEstabl Type List: The Structure & Establishment Types portlet.

This list details the daily user portlets where you can set up and use global or user-defined quickqueries.

- ACA My Permit List: The My Permit List on the record home page in Citizen Access.
- Citizen Access Record List: The record list in Citizen Access.
- AMS Asset CA List: The Asset Condition Assessment list portlet.
- AMS Asset Data List: The Assets list portlet.
- AMS Asset Work Order List: The Work Order tab in the Assets portlet.
- AMS Part Inventory List: The Part Inventory list portlet.
- AMS Part Transaction List: The Part Transaction tab in the Part Inventory portlet.
- AMS PM Schedule List: The PM Schedules list portlet.
- AMS Work Order Asset List: The Assets tab in the Work Orders portlet.
- Batch Invoice List: The Invoices list portlet.
- Batch Job List: The Batch Jobs list portlet.
- Contact Record List: The Record List tab in the Contacts portlet.
- Fees List - The Payment tab in the Payment Processing portlet.
- Inspection List: The Inspections list portlet, and the Inspections tab in the My Tasks portlet.
- My Document Task List: The Document Review Tasks tab in the My Tasks portlet.
- My Workflow Task List: The Workflow Tasks tab in the My Tasks portlet.
- Point of Sale Transaction List: The Point of Sale list portlet.
- Record List: The Record list portlet.
- Record Set Member List: The Set Members tab in the Set: Records portlet.
- Record Status History List: The Application History tab in the Record portlet.
- Reference Address List: The Addresses list portlet.
- Reference Contact List: The Contacts list portlet.
- Reference Owner List: The Owners list portlet.
- Reference Parcel List: The Parcels list portlet.
- Reference Professional List: The Professionals list portlet.
- Reference StructEstabl List: The Structures & Establishments list portlet.
- Related Record List: The Related Records tab in the Record portlet.
- Trust Account List: The Trust Account list portlet.

Designing Forms for Portlets

Form Portlet Designer enables you to customize the forms in your Civic Platform system. “Forms” are where agency users enter data, and where Civic Platform collects all of the data that it stores in the back-end database. You can design forms for use at the agency, module, user group, and individual user levels, depending on your agency’s information-gathering requirements. Form layout designs and field characteristics apply to all sub-levels.

Click a topic title below for full details.

Related Information

[Working with Forms](#)

[Working with Lists](#)

[Working with Customized Views](#)

[Creating Dynamic Text Labels](#)

Working with Forms

Topics

- [Creating a Form](#)
- [Customizing a Form](#)
- [Setting Default Values for Fields in a Search Form](#)
- [Using the Edit View Feature](#)

Creating a Form

This section describes how to create a form using the Form Portlet Designer. To create a form, you select the portlet and then determine what organizational level you want to apply to the form. After determining the portlet and the organization levels, choose which fields to make available. Each field has unique attributes you can specify; for full details see [Customizing a Form](#).

To create a form

1. Access the Form Portlet Designer ([Accessing the Form Portlet Designer](#)).
2. Identify which users you are granting access to your new form. Click the tab that corresponds with the access-level you are creating for the form: Agency, Module, Group, or User tab.
Best practice is to design a form on the Agency tab and then restrict access based on any other user access: Module, User Group, and User.
If you choose the User tab you can limit access to just one user, which eliminates the possibility for other groups to access the form.
3. Choose from the Portlet, Agency, Module, Group, and User drop-down menus to specify where you want the form to display. For example, if you selected the Module tab, choose the Module from the drop-down menu. With each selection, Form Portlet Designer refreshes and displays available options. Also, depending on which tab you selected, the fields vary. For example, if you selected the Agency tab, you only need to choose an item from the Agency and Portlet drop-down menus.

Administration

Form Portlet Designer

New Delete Copy Help

Agency Module User Group User Personalization Dynamic Text

Agency OREGON
Module Select Module
Group Select Group
User Select User

Copy to

Name	Module
<input type="checkbox"/> Record Detail Spear Form - Building	Building
<input type="checkbox"/> Rule List	Building
<input type="checkbox"/> Process Form	Building
<input type="checkbox"/> Record List - Building	Building
<input type="checkbox"/> Record List - Building	Building
<input type="checkbox"/> ACA Parcel Form - Building	Building
<input type="checkbox"/> My Workflow Task List	Building
<input type="checkbox"/> Address Search	Building

4. Click New.

Civic Platform displays a layout editor and the Available Fields page.

Available Fields - Window... Global Search

Delete Available Fields Text Cancel Help

Group User Personalization Dynamic Text

Source View Name Single Entry New Record Form

Align Command --Select--

Filter Name: Record Detail Spear Form - Building

5. Complete the following fields.

Filter Name	Enter a descriptive name for the filter, so that you can identify it if you need to locate it later. After you save a form, the Filter Name displays in the Name column.
Description	Enter a descriptive name to help identify the purpose of the form.
Source View	The Source View Name is read-only and you cannot modify it.

6. Arrange the fields on the form in the same order you want them to appear for users when they complete the form.

For complete details, see [Customizing a Form](#).

7. Rename any of the field labels, according to your agency's business objectives, as follows:

- a. Double click a field name to access the properties page for the field.

- b. Modify the text that displays in the Label field. You cannot change the database label (DB Label).
 - c. Click **OK**.
- Civic Platform displays your customized field name.
8. When you are happy with the layout of the form click **Save**.

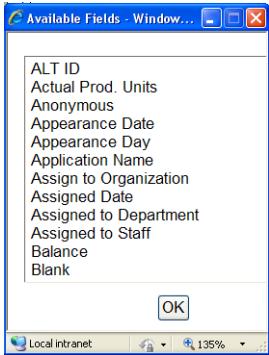
Customizing a Form

When you create or edit a form in the Form Portlet Designer, you can use the different controls to show, hide, move, make read-only, and alter the available fields according to your business objectives. This section explains the controls you can use to customize forms in the Form Portlet Designer.

To customize a form

1. Open the Form Portlet Designer by either creating or editing a form layout.
For instructions, see [Creating a Form](#) or [Customizing a Form](#).
2. Click **Available Fields**.

Civic Platform displays the Available Fields page.



3. To display or hide fields:

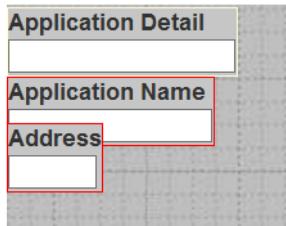
- a. To display fields, from the list of **Available Fields**, double-click each field you want to add to the form, and then click **OK**.
Civic Platform displays the selected field on the layout page and removes the selected fields from the Available Fields list.



Note:
The Available Fields list also provides the Address Template, Parcel Template, or Owner Template options. If you select any of those options, Civic Platform removes the option from the Available Fields list and displays all active attributes of the selected template as additional fields on the form. The APO Form Layout Editor defines the layout and display of each field in a template.

On the Record Search form, only record-searchable attributes display as available fields. You can specify which attributes are record-searchable when creating or editing a template.

- b. To hide a field, select the field on the layout page and click **Delete**.
4. To change the location of a field, drag the field to its new location on the layout page.
If your field arrangement causes any fields to overlap, the overlapping fields display with red borders, enabling you to easily identify them.

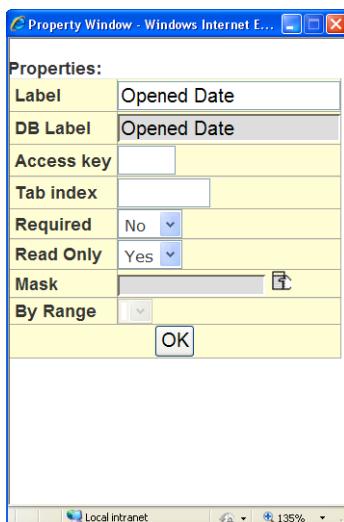


If you have any overlapping fields on your form when you attempt to save it, Civic Platform returns an error. To save the form, you must locate the overlapping fields (see the above example) and separate them.

5. To change a field name (Label) or any of the field's properties:

- Double-click the field you want to change.

Civic Platform displays the Field Properties page.



- Modify the field properties as necessary. Note: you cannot modify the database label (DB Label).

For a list of field descriptions, see [Table 21: Form Designer Field Properties](#)

- Click **OK**.

6. To add a URL link to the form:

- Click Text, which adds a dynamic label to the form. Then double-click the dynamic label and:

- In the Label field, enter the text of the link.
- In the URL field, enter the URL for the website that opens when a user clicks the link.

The screenshot shows the 'Text' tab selected in the top navigation bar. Below it, there are tabs for Agency, Module, User Group, User, and Personalization. The 'Filter Name' is set to 'Record Summary' and the 'Source View Name' is partially visible. The 'Description' is also 'Record Summary'. An 'Align Command' dropdown is set to '-Select-'. The main area displays a grid-based form layout with fields for Application Detail, Application Type, Address, Owner Name, Owner Address, and a dynamic label 'This is a dynamic label'. A red arrow points from the 'Text' tab to the dynamic label field.

- Click Preview to review the layout of your form.

Civic Platform displays a Preview page.

The screenshot shows the 'Preview' tab selected in the top navigation bar. Below it, there are tabs for Agency, Module, User Group, User, Personalization, and Dynamic Text. The 'Filter Name' is 'Record Summary', 'Source View Name' is 'Record Summary', 'Description' is 'Record Summary', and 'Align Command' is '-Select-'. The main area displays the same form layout as the designer, including the dynamic label 'This is a dynamic label'. A preview window titled 'Preview - [Form Portlet D...]' is open, showing the form layout.

To close the preview, simply close the preview page.

- When you are happy with the appearance of your form, click **Save**.

Table 21: Form Designer Field Properties

Access Key	Enter the shortcut key that users can press in addition to the ALT key to position the cursor in this field. For example, if you want users to be able to access the Asset ID field by pressing ALT+I, enter the letter I in this field.
------------	--

By Range	When applicable, allows the user to search this field based on a range of values. The default is Yes. If you select No, the field allows for searching on a single field, not on a range. (Optional)
DB Label	This field is display-only. It shows the actual name of the field as it displays in your database.
Default Value	<p>Set a default value for the field on a search form portlet. The default value you set appears in the field whenever users navigate to the search form portlet.</p> <p>If you do not supply a value, the field can either be blank (null) or it can display the value that the user entered during his or her last search, depending on the field type.</p> <p>If you want this type of field to always appear as blank (null) in a new search, select Set Null in the Default Value property setting for the desired field. This property is only available for fields on search form portlets.</p> <p>The default value varies depending on the By Range field property. When you set the By Range field property to Yes, Civic Platform displays the Default From and Default To properties instead of the Default Value property. When you set it to No, Civic Platform displays the Default Value property only.</p> <p>For more information on setting a default value for a search field, see Setting Default Values for Fields in a Search Form.</p>
Label	Enter a label for the field as you want it to display on the form.
Mask	Choose a mask type from the list of masks to apply to the field.
Read Only	<p>The default is No. Use the drop-down list and choose Yes to make the field read-only when users access the form. Whichever level you design the form for, the read-only characteristic then affects all of its sublevels.</p> <p>For example, if you design the form for the agency level, the read-only attribute applies to the sublevels of module, user group, and individual users. Or, if you design the form at the module level then the read-only characteristic applies to the sublevels of user group and users.</p>
Required	Specify if you want to make the field mandatory. When completing a form, users must enter information in a required field. Required fields display in the Form Layout Editor as well on the actual form with a red asterisk.
Tab Index	<p>Enter a number to determine the position of this field in a tab sequence. When a user is working with a form, he or she can press the TAB key to move from field to field.</p> <p>The index number determines the order in which this field becomes active in relation to other fields on the same form.</p>

Setting Default Values for Fields in a Search Form

This section explains how to set a default value for a field in a search form. The default values you set appear in the field whenever users navigate to the search form. For example, you can have the City field populated with the value of "Bridgeview" when the user opens the Owner Search form so the user does not need to manually select or enter the city name.

You can set default values in the Form Portlet Designer, in the Edit View feature, or any fields that allow you to enter a value in the Default Value property. If you do not supply a value, the field can either be blank (null) or it can display the value predefined by the search logic. If you want this type of field to always appear as blank (null) in a new search, select Set Null in the Default Value property setting for the desired field.

You can set a default value for a field of the text, numeric, date, radio button, or check box type. You can also set a default option for a drop-down list field. However, the Default Value property setting is not available for data picker fields such as Record Type, Department, and User, because the options for those fields vary by agency. For radio button fields, check box fields, and drop-down list fields, the default value must be a valid database value, instead of a label text.

Some numeric fields support a range of values as the search criteria. You can allow a range of values for a numeric field by setting the By Range property for the desired field to Yes. This way, you can specify a default minimum value, a maximum value, or both that you want to apply to the range of acceptable values.

To set a default value for a search field

1. Access the Form Portlet Designer ([Accessing the Form Portlet Designer](#)).

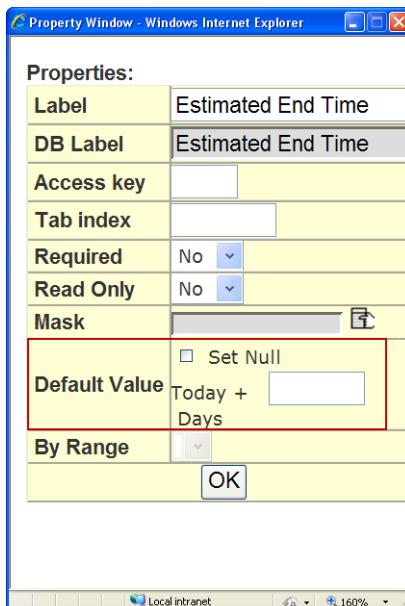
2. In the Portlet field, select the search form you want to customize.

Civic Platform displays the form layout editor.

3. Double-click field you want to change.

- Date fields

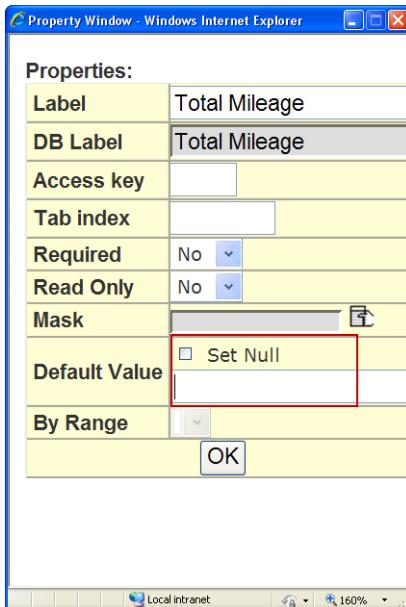
Civic Platform displays the Default Value property with a Set Null option and a Today + Days field.



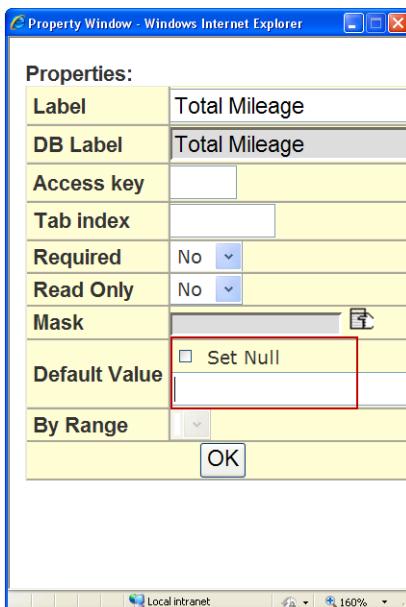
Note: The **Set Null** default value setting of the date field on a search form overrides the **FIND APP DATE RANGE** standard choice setting. For example, if **Set Null** is enabled for the Opened Date field on the Search Form Portlet Designer, and the **FIND APP DATE RANGE** standard choice value is set to 120 days, the Opened Date field on the form will be set to null.

- Fields of other types that do not support searches based on a range of values

Civic Platform displays the Default Value property with a Set Null option and a text field.



- Fields of other types that support searches based on a range of values
Civic Platform displays the Default From and Default To properties. Each default value property has a Set Null option and a text field.



4. Enter a default value for the field.

The value you can enter depends on the type of the field. For examples of default values, see [Table 22: Default Value Property Setting](#).

5. Click OK.

Table 22: Default Value Property Setting

Field Type	Example Default Value	Notes
Check Box	Y	Enter the key value of the check box status as stored in your database.

Field Type	Example Default Value	Notes
Date	Today + 90 Days	Specify a date range in the Today + <i>n</i> Days field. If you enter a positive integer, the default search criteria is within <i>X</i> days after the current date. If you enter a negative integer, the default search criteria is within <i>X</i> days before the current date.
Drop-down List	North	Enter the key value of a valid option as stored in your database. An easy way to identify the correct key value is to view the source code for the search form in your browser and locate the content of the option value.
Numeric	8887222352	If you set the By Range property for the field to Yes, enter a valid number in the Default Value property setting. If you set it to No, enter a valid number in the Default From property setting, the Default To property setting, or both.
Radio Button	Y	Enter the key value of a valid option that you have stored and identified in your database. An easy way to get the correct key value is to view the source code of the search form in your browser and locate the content of the option value.
Text	New	Enter valid alphanumeric characters in the Default Value property setting.

Using the Edit View Feature

Civic Platform provides the Edit View feature to customize how information displays in a form.

To edit the view of a form portlet

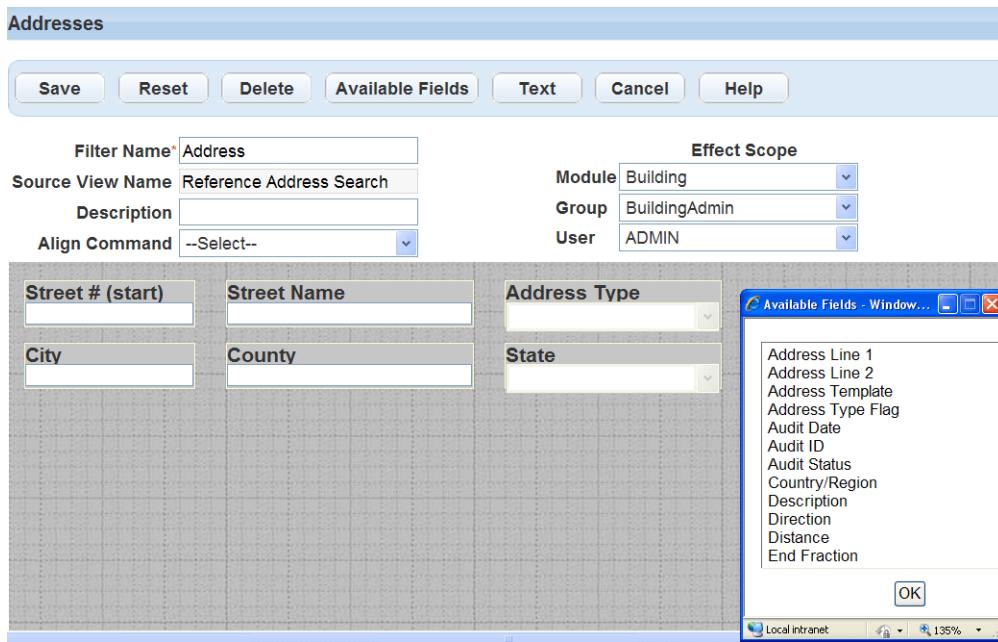
1. Locate the form portlet you want to customize and click **Menu**.

Civic Platform displays the menu options.

The screenshot shows a 'Addresses' form portlet. At the top, there is a 'Menu' button with a dropdown arrow, followed by 'Submit', 'Reset', 'Cancel', and 'Help' buttons. The 'Edit View' option is highlighted with a blue box in the dropdown menu. Below the menu, there are several input fields: 'Street Name' (with placeholder 'Street# (start)'), 'Address Type' (a dropdown menu with 'Select' option), 'City', 'County', and 'State'. The 'Street Name' field has a red border, indicating it is the active field.

2. Choose the **Edit View** option from the drop-down menu.

Civic Platform displays the Edit View page and the Available Fields page.



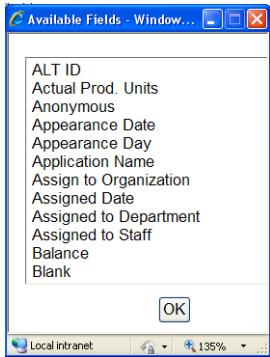
3. Complete the following fields:

- | | |
|------------------|---|
| Filter Name | Enter a descriptive name for the form portlet. This filter name is the name you can use to locate the form using the Form Portlet Designer. |
| Source View Name | This field is not editable. |
| Description | Enter a description to help identify the purpose of the form. |
| Align Command | Use this drop-down list after you have added fields to the form. Select one or more fields and choose the desired option from the drop-down list. |
| Effect Scope | Specify the availability of the customized filter for the desired module, user group, or user with the corresponding drop-down list. |

4. If you want to show an available field, do the following:

a. Click Available Fields.

Civic Platform displays the Available Fields page.



b. Select a field from the list of Available Fields. To select multiple fields, double-click each field.

c. Click OK.

Civic Platform places the selected field on the form and removes the field from the Available Fields list.

**Note:**

The Available Fields list also provides the Address Template, Parcel Template, or Owner Template options. If you select any of those options, Civic Platform removes the option from the Available Fields list and displays all active attributes of the selected template as additional fields on the form. The APO Form Layout Editor defines the layout and display of each active field in a template.

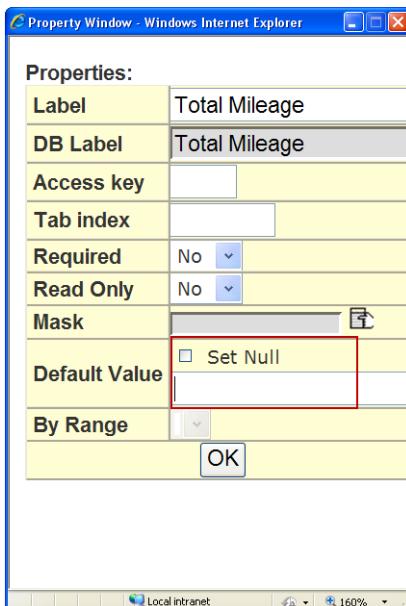
On the Record Search form, only record-searchable attributes can show up as additional fields. You can specify which attributes are record-searchable when creating or editing a template.

5. To hide a selected field, select the field on the form and click **Delete**.
6. To change the position of a field, drag the field to the new position on the form.
7. To change a fields name or its properties:

- a. Double-click the field you want to change.

Depending on the type of form you are editing, your options vary.

Civic Platform displays the Field Properties page.



- b. Complete the field properties as necessary.

For a list of field descriptions, see [Table 21: Form Designer Field Properties](#)

- c. Click **OK**.

8. When you are happy with the appearance of your form click **Submit**.

Working with Lists

The List Layout Editor enables you to customize the list portlets in Civic Platform. You can set up lists at the agency, module, user group, and even individual user levels, depending on what you want certain users to see. When you create a list design, it applies to all sub-levels.

Topics

- [Creating a List Portlet](#)
- [Editing a List Portlet Layout](#)

Creating a List Portlet

This section describes how to create a list portlet using the List Layout Editor. To do this, select the portlet and determine which organization level you want to apply to the list. After you determine the portlet and the affected organization level, you can determine which fields you want to make available on the list portlet using the List Layout Editor.

You can show or hide certain fields, make fields read-only, and control the field order and width of each field using the List Layout Editor. Fields on a list display as column headers.

To create a list portlet

1. Identify which users can access your new list and select an existing list to use as a template upon which to build your portlet.

For instructions to do this, see [Customizing Menus, Tabs, and Drop-down Lists](#).

2. Click **New**.

Civic Platform displays the List Layout Editor.

Element	Display Order	Width (pixels)	Required Label	Mask	Sort Order	A-Z Ascending
Last Name	1	140	Yes		1st	<input type="radio"/>
First Name	2	100	Yes		2nd	<input type="radio"/>
Middle Name	3	100	No		3rd	<input type="radio"/>
Organization Name	4	240	No			<input checked="" type="checkbox"/> A->Z Ascending
Type	5	100	Yes			<input type="radio"/>
Phone 2	6	80	No	Mobile Phone (XXX)XXX-XXXX		<input type="radio"/>
Phone 1	7	80	Yes	Home Phone (XXX)XXX-XXXX		<input type="radio"/>
E-mail	8	60	No			<input type="radio"/>
Reference Contact ID	9	100				<input type="radio"/>

3. Complete the fields as necessary.

For a list of field descriptions, see [Table 23: List Layout Editor Details](#).

4. Click **Save**.

Table 23: List Layout Editor Details

Available Fields	Displays the fields that are available to use but are not currently displaying in the list portlet. To move any field to the Selected Fields box, highlight the field and click the right-arrow. To move all fields, click double arrow. Hold the CTRL key to select multiple fields.
A > Z Ascending	Select this option to further sort a selected sort order field in an ascending order alphabetically from A to Z. This option is the default setting and is available when you select a sort order for a field.
Contract	Enter the minimum number of items to display on one page of a list.
Description	Enter a description for the form.

Display Order	Specify the order for displaying each field on the form.
Effect Scope	Specify the availability of the customized sort/filter using the drop-down feature for Module, Group, and User.
Element	Civic Platform lists the fields in the Selected Fields box in their current order.
Expand	Enter the maximum number of items to display on one page of a list.
Filter Name	Enter a descriptive name for the filter.
Label	If you want to customize the text label for a field, enter the new text label in the label field.
Mask	If you want to add a mask to the display of any field, click Mask to set up the mask.
Number of Records	The amount of records you want the user to see. The Contract option is the number of records displaying when a user contracts a list in a portlet and you have more than one portlet on your screen. The Expand field is the list of records shown when a user expands a list in one portlet.
Record Selection	Select the type of record selection icon you want to apply to the list. Civic Platform defaults to the Check Box record selection tool. If you do not want to allow users to select records, select None.
Required	Specify if you want to make the field mandatory. If you select Yes, a red asterisk displays on that field and a user cannot submit the form until that field has data entered in it.
Selected Fields	Displays the fields that currently display in the list portlet. To remove any field, highlight the field and click left-facing arrow. To move all fields, click double arrow. Hold the CTRL key to select multiple fields. To change the order, highlight a field and click up or down arrows.
Sort Order	Enter the sort order of a particular field. Civic Platform sorts lists based on the sort order. Civic Platform sorts fields with the lowest sort order (highest priority) first, to simplify organizing and grouping list items. For example, if you assign the sort order of the Type field to "1st" and the sort order of the Subtype field to "2nd," Civic Platform sorts the list first by type and then by subtype.  Note: If you want the newest record to appear at the top of the list, assign the Audit Date field to the 1st sort order. This field contains the record's creation date and time.
Source View Name	Civic Platform identifies the name of the form you are modifying.
Width	Enter the number of pixels for the column width.
Z > A Descending	Select this option to further sort a selected sort order field in a descending order alphabetically from Z to A. This option is available when you select a sort order for a field.

Editing a List Portlet Layout

You can show or hide certain fields, make fields read-only, and control the order in which fields display and their width, with the List Layout Editor. Fields on a list display as column headers.

To edit a list portlet layout

- Find the list to edit by identifying which users access the list.

For instructions to do this, see [Customizing Menus, Tabs, and Drop-down Lists](#).

- Click the list design you want to edit.

Civic Platform displays the List Layout Editor.

Element	Display Order	Width (pixels)	Required Label	Mask	1st	2nd	3rd	A-Z Ascending
Alternate ID	1	120	No	Record #	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Status	2	100	No		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expiration Status	3	100	No		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expiration Date	4	80	No		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Record Type Alias	5	180	No	Record Type	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Opened Date	6	80	No		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Application Name	7	180	No		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number	8	80	No	Street #	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Direction	9	40	No	Dir	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. Complete the fields as necessary.

For a list of field descriptions, see [Table 23: List Layout Editor Details](#).

4. Click **Save**.

Working with Customized Views

- [Removing a Customized View](#)
- [Copying a Customized View](#)
- [Accessing and Assigning the View](#)

Removing a Customized View

This section describes how to remove a customized form or list portlet. Removing a customized view allows users to see all available fields according to the default settings.

To remove a customized view

1. Identify which users access the customized view you want to remove.
For instructions to do this, see [Customizing Menus, Tabs, and Drop-down Lists](#).
2. Select the customized view you want to remove.
3. Click **Delete**.
Civic Platform removes the form design, and updates the list of available forms.

Copying a Customized View

This section describes how to copy a customized view to another user or group of users. For example, if you need to make a customized record list for all users who manage fee information, you need to make the list for the billing department as well as the cashier user group. The cashier user group might not belong to the same user group as the billing department. In such a case, you can create a customized view and copy it to all necessary user groups.

To create a copy of a customized view

1. Select the existing customized view to use as a pattern.
For instructions to do this, see [Customizing Menus, Tabs, and Drop-down Lists](#).
2. Use the **Copy to** Fields to identify which user or users you want to copy the customized view assignment to.
For descriptions of each field, see [Table 24: Copy to Field Details](#)
3. Select each view you want to copy.
4. Click **Copy** in the toolbar.

Civic Platform copies the view and identifies how many customized views it successfully copied.

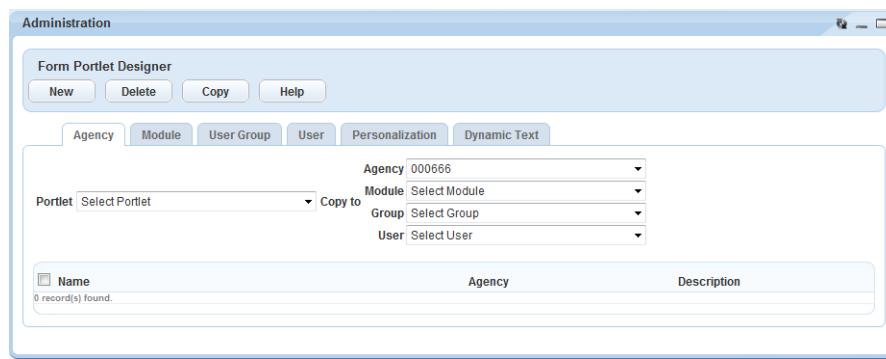
Table 24: Copy to Field Details

Agency	Select the agency to which you want to copy the customized view.
Module	Select the module to which you want to copy the customized view.
User Group	Select the user group to which you want to copy the customized view.
User	Select the user to which you want to copy the customized view.

Accessing and Assigning the View

To access and assign a view

1. Access the Form Portlet Designer ([Accessing the Form Portlet Designer](#)).
 2. Click one of the following tabs depending on the level of form you want to create: **Agency**, **Module**, **User Group**, **User**, **Personalization**, or **Dynamic Text**. We are using the Module tab to illustrate this example. For a list of fields, see [Table 25: View Filter Fields](#). Depending on the level (agency, module, user group, or user) of the design you create, you might not see all of these fields.
- The Personalization tab is view only. Administrators can only view and delete personal forms or lists. You cannot modify lists or forms using this tab.
- Civic Platform displays a list of all custom views defined for the selected organization level.



3. Use the filter menus to refine the list of views.

For a list of fields, see [Table 25: View Filter Fields](#). Depending on the level (agency, module, user group, or user) of the design you create, you might not see all of these fields.

Civic Platform updates the list to reflect the selected agency, module, user group, and view.

4. Choose one of the following as appropriate:

- Add a new customized form. For instructions, see [Creating a Form](#).

- Add a new customized list. For instructions, see [Creating a List Portlet](#).
- Edit an existing form. For instructions, see [Customizing a Form](#).
- Edit an existing list. For instructions, see [Editing a List Portlet Layout](#).
- Remove an existing customized view. For instructions, see [Removing a Customized View](#).
- Copy an existing view. For instructions, see [Copying a Customized View](#).

Table 25: View Filter Fields

Agency	Select the agency that contains the module you want to work with.
Module	Select the module that contains the user group you want to work with.
Portlet	Select the list or form view you want to work with.
User Group	Select the user group that contains the user you want to work with.
User	Select the view you want to work with. A view is either a list or a form in Civic Platform. Every list or form you can modify appears in this drop-down menu.

Creating Dynamic Text Labels

The Dynamic Text Tab enables you to create text labels that allow users to switch languages in customized form layouts. Use the buttons at the top of the portlet to search for, add, or delete a dynamic text label. After you create a label, you must add it to the form layout where you want it to display. For instructions on creating a form layout, see [Creating a Form](#).


Note:

The dynamic text label feature specifically applies to Civic Platform systems configured for Internationalization.

To create a dynamic text label

1. Access the Form Portlet Designer ([Accessing the Form Portlet Designer](#)).
2. Click **Dynamic Text** tab.

Civic Platform displays the Dynamic Text List view.

Key	Display Text	Language	Country/Region
key.label	key.label	English	United States

3. Click **New**.

Civic Platform displays the Dynamic Text New page.

The screenshot shows a top navigation bar with buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. Below this is a form with three fields: 'Key' (a text input field), 'Display Text' (another text input field), and 'Language' (a dropdown menu). The 'Key' field has a red asterisk indicating it is required.

4. Complete these fields:

- | | |
|--------------|--|
| Key | The name of the text label. |
| Display Text | The text that displays on the screen to the user. |
| Language | If your system is localized/internationalized, select the desired language from the available drop-down list to apply to the display text. |

5. Click **Submit.**

Civic Platform adds the label to the Dynamic Text List view.

Part 2: Setting Up Agencies, Organizations, and People

Civic Platform provides functions to set up your agency.

Related Information

[Configuring Organizations, Departments, and Users](#)

[Managing Contacts, Licensed Professionals, and Public Users](#)

[Setting Up Cross-Agency Operations](#)

[Customizing Regional Settings](#)

Configuring Organizations, Departments, and Users

This section contains the information you need to structure your organization and conduct user administration tasks, such as resetting passwords and assigning access permissions.

Click a topic title below for full details.

Related Information

[Working with Organizations](#)

[Establishing User Groups](#)

[Managing Users](#)

Working with Organizations

Topics

- [Adding a Level to an Organization Structure](#)
- [Establishing an Organization Structure](#)
- [Editing an Organization Structure](#)
- [Establishing an Organization Alias](#)
- [Editing an Organization Level](#)

Adding a Level to an Organization Structure

When you set up your organization in Civic Platform, you define up to six organization levels. The main level is the service provider. Civic Platform provides this value when you implement Civic Platform. Your service provider code is a unique code that distinguishes your agency from all other jurisdictions for which Civic Platform is the service provider. You cannot change this value.

You can define these six levels:

- **Agency.** You determine this value for one or more agencies that you set up. When you search for departments within Civic Platform, this is the first level within an organization structure you can select. You also use your agency name when you log in to Civic Platform.
- **Bureau.** An organization level within an agency.
- **Division.** An organization level within a bureau.
- **Section.** An organization level within a division.
- **Group.** An organization level within a section.
- **Office.** An organization level within a group. An office is the final level within an organization structure. You cannot add a branch to this organization level.



Note:

When you set up an organization structure, you must include all six levels, or branches. Even if you do not use the lower organization levels, you should add an “NA” branch for each level to include in the structure.

Examples:

Metroville > building > na > na > na > na > na > Counter Technicians

Metroville > building > inspections > na > na > na > na > Inspectors

Metroville > buidling > na > na > na > na > Inspections > Inspectors

Civic Platform uses this structure in two places:

- To identify the department assigned to the Task in a process stack
- To assign a user to a department

When a user does anything, Civic Platform inserts not only the user name but also the assigned department. Also, when assigning inspections or tasks, the manager can look up the department and select a user in that department to do the required inspection or task.

To set up a hierarchy among departments, you can define branches within each branch.

Here is an example of a typical setup:

- Your Civic Platform implementation specialist defines the Service Provider as the main agency when during your initial system set up.
- Add the first level to the main agency. Usually, this level matches or is equal to the available modules turned on for Civic Platform. For example, if you had Building, Enforcement, and Planning modules, you can add three levels to the Agency called Building, Enforcement, and Planning.
- Add under each first level a level called Bureau. The setup looks like this example: Metroville > Building > Inspections Metroville > Enforcement > Inspections Metroville > Planning > Inspections
- Add additional levels to the Bureau level. For example, in Building you might have Inspections, Counter, BuildingAdmins, and Cashier. The setup looks like this example: Metroville > Building > Inspections Metroville > Building > Counter Metroville > Building > BuildingAdmins Metroville > Building > Cashier
- Each agency could have multiple nodes at the Bureau level. Enforcement might have Inspections, Counter, BuildingAdmins, or Cashier. The setup looks like this example: Metroville > Enforcement > Inspections Metroville > Enforcement > Counter Metroville > Enforcement > BuildingAdmins Metroville > Enforcement > Cashier

When you have no more levels to add, use NA.

To add a level to an organization structure

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose **User Profile > Organizations**.

Civic Platform displays the Set Up Organization page with links to each organization level.

[Set Up Organization](#)

Click name to show all branches one level below:

Service Provider > Agency > Bureau > Division > Section > Group > Office
[SACRAMENTO](#)

3. Click the link to the appropriate level to which you want to add a branch. For example, click **Metroville**. Civic Platform displays a list of all of the branches embedded within a level. For example, if you click the link to a specific agency, Civic Platform displays a list of all of the bureaus defined for that agency.
4. Continue to click the link to the next level as needed to add a branch to that level.

For example, to add an office to a group, click the link to the agency, then the link to the bureau, then the link to the division, then the link to the section. Lastly, click the link to the group to which you want to add the office branch.

5. Click Add.

Civic Platform displays an Add Branch window, where you can view the current level of the branch you are about to add.

6. Complete these fields:

Name	Enter the name of the branch that helps to identify it.
Description	Enter a description of the branch that helps to identify its purpose.
Status	If you want the branch to be available in Civic Platform, select Enable ; otherwise, select Disable .

7. Click Add.

Establishing an Organization Structure

After you identify the branches for each organization level in your agency, you can set up an organization structure. An organization structure, similar to a department, identifies a certain group of staff members. When a user searches for departments in Civic Platform, they can find the organization structures you have set up.



Note:

Before you can define a new organization structure, you must define branches and include all six levels of organization branches within the structure. To set up branches, see [Adding a Level to an Organization Structure](#).

To establish an organization structure

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose User Profile > Organization.

Civic Platform displays the Set Up Organization page with links to each organization level.



Note:

Your service provider code shows up as a link under the Service Provider heading.

3. Click the link to the agency you want to include in your organization structure.

Civic Platform displays a list of all of the bureaus within the agency.

4. Click the link to the bureau you want to include in your organization structure.

Civic Platform displays a list of all of the divisions within the bureau.

5. Click the link to the division you want to include in your organization structure.

Civic Platform displays a list of all of the sections within the division.

6. Click the link to the section you want to include in your organization structure.

Civic Platform displays a list of all of the groups within the section.

7. Click the link to the group you want to include in your organization structure.

Civic Platform displays a list of all of the offices within the group.

8. Click the link to the office you want to include in your organization structure.

9. Click Add.

Civic Platform displays an Add Structure screen. In this window, you can view the definition of the structure you are about to add.

10. Complete these fields:

Description	Enter a unique description for the structure.
Status	If you want the structure to be available in Civic Platform, select Enable ; otherwise, select Disable .

11. Click Add.

Editing an Organization Structure

After you add an organization structure to Civic Platform, you might need to change the description. You might also need to disable a structure that represents an obsolete department within your agency.



Note:

Because departments link directly to tasks, if you change a department name, you must rework every related task and associated user in Civic Platform. Accela recommends that you do not change organization names.

It is best practice to inform users of any departments that you disable. Departments affect many areas of the Civic Platform system, including conditions, workflow, and inspections. If users try to use a disabled department, Civic Platform displays a message informing them that the department is not active and to contact their agency administrator.

To edit an organization structure

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose **User Profile > Organization**.

Civic Platform displays a list of structures at the bottom of the window.

3. In the list of structures, click the red dot that appears next to the structure you want to edit.

Civic Platform displays the Edit Structure pop-up window. In this window, you can view the definition of the structure you are about to edit.

4. Update these fields:

Description	Enter a unique description for the structure.
Status	If you want the structure to be available in Civic Platform, select Enable ; otherwise, select Disable .

5. Click **Update**.

Establishing an Organization Alias

An organization contains six organization levels. If enabled, you can have the option to specify a department name alias. Aliases enable you to replace a multi-level organization description with an abbreviated and descriptive alias, such as Records Department.

After you establish an alias, users can choose from a list of organization aliases when selecting a department in these situations:

- Assigning a workflow task
- Creating a new user

- Scheduling an inspection
- Assigning an inspection
- Looking up inspection statistics
- Applying conditions
- Updating the workflow status for a set of applications
- Creating a tickler

**Note:**

If you choose not to establish an alias for an organization structure, Civic Platform displays the 6-level combined version of the department name when users search for a department.

You must establish an organizational structure before you can apply an alias to the structure. For instructions, see [Establishing an Organization Structure](#).

To establish an organization alias

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > Organization**.
Civic Platform displays the Set Up Organization page.
3. Scroll down the page to display the list of organizational structures.
4. Click the red dot that appears to the left of the organization structure you want.
Civic Platform displays the Edit Organization Structure window.
5. Complete this field:

Department	Enter a unique alias that clearly represents the organization structure.
------------	--
6. Click **Update**.

Editing an Organization Level

After you add a branch to an organization level, you might need to change the branch description. You can enable and disable branches in your organization as needed.

It is best practice to inform users of departments that you disable. Departments effect many areas of the Civic Platform system including conditions, workflow, and inspections, for example. If users try to use a disabled department, Civic Platform displays a message informing them that the department is not active and to contact their agency administrator.

To edit an organization level

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > Organization**.
Civic Platform displays the Set Up Organization page with links to each organization level.
3. Click the link to the appropriate level for which you want to edit a branch.
Civic Platform displays a list of all of the branches embedded within a level. For example, if you click the link to a specific agency, Civic Platform displays a list of all of the bureaus defined for that agency.
4. Continue to click the link to the next level as needed to edit a branch at that level.

Click the link to the agency > the link to the bureau > the link to the division > the link to the section. Lastly, click the link to the group where you want to edit that branch.

5. Click the red dot that appears next to the branch you want to edit.

Civic Platform displays an Edit Branch pop-up window. In this window, you can view the current level and the name of the branch you are about to edit.

6. Update these fields:

Description	Enter a description of the branch that helps to identify its purpose.
Status	If you want the branch to be available in Civic Platform, select Enable ; otherwise, select Disable .

7. Click **Update**.

Establishing User Groups

Topics

- [Adding a User Group](#)
- [Searching for a User Group](#)
- [Editing a User Group](#)

Adding a User Group

Before you can grant a user certain privileges in Civic Platform, you must determine what privileges you want to include in the user group. When you add a new user group you can determine each function you want to make available to users who are part of the group. You can also determine what level of access you want to apply to each function—for example, “full access” or “read only.”



Note:

Although you cannot delete a user group, you can disable the user group.

To add a user group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > User Group**.
3. Click **Add**.
4. Complete the fields as described in [Table 26: User Group Fields](#).
5. For each function, select the level of access you want to grant to the user group.
6. Click **Save**.

Table 26: User Group Fields

Group Name	Enter a unique name for this user group that describes the functions and privileges of the group. For example, enter “Admin Full” or “Inspectors.”
------------	--

Module	Select the module you want to make accessible to users in this group. If you want to give this user group access to additional modules, you can set up a new user group with the same name, but choose a different module.
Description	Enter a description of the user group.
Status	If you want the user group to be available to use Civic Platform, select Enable ; otherwise, select Disable .

Searching for a User Group

You can search for any user group on your system, including those you previously disabled. For example, you can search for a user group to update information or to change its status.



Note:

To see a list of all user groups, Click **Submit** without entering the group name.

To search for a user group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > User Group**.
3. Enter the name of the user group in the **Group Name** field.
4. Click **Submit**.
Civic Platform displays the User Group Browse page.
5. Click the red dot next to the group you want to edit.

Editing a User Group

After you create a user group, you might need to change some of the functions and privileges within the user group. You can change the group name as well as the group status. If you no longer use a user group, you can disable it.

To edit a user group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > User Group**.
3. Search for the user group you want to edit.
4. Complete the necessary fields as described in [Table 26: User Group Fields](#).
5. For each function, select the level of access you want to grant to the user group.
6. Click **Save**.

Managing Users

Topics

- [Adding a User](#)

- [Viewing a User](#)
- [Editing a User](#)
- [Setting a User's Default Module](#)
- [Setting a User Account Disable Time Frame](#)
- [Setting a User Password Time-out Time Frame](#)
- [Manually Enabling a User Account](#)
- [Changing a User Password](#)
- [Synchronizing External User Data](#)

Adding a User

As your agency's staff changes, you might need to add new users to your system. You can determine the ID and password information that the user needs to log in to Civic Platform. You can also determine the department and the user group to which the new user belongs.



Note:

If a specific user is an inspector and you choose to automatically assign and schedule inspections, you must identify the inspector profile. For instructions, see [Inspections](#).

To add a user

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > User**.
3. Click the **Add New User** button.
Civic Platform displays the User-Add page.

User - Add
Use this form to add User.

User Login ID * : AA User External User

Password * : Password Strength Requirements

Distinguished Name:

User Name: First Mi Last

Initials:

Display Initials in ACA:

Title:

Employee ID:

Email:

Phone Number:

IVR User Number: 000015367

IVR Pin Number:

Department * :

Account Disable Time Frame: 365 (days)

Password Timeout Time Frame: 365 (days)

Password Change: By User By Administrator

User must change Password at next Logon: Yes No

Billing Rate: 0.0 (\$/hour)

Daily Inspection Units:

Cashier ID:

Status: Enable Disable

Last Login Date:

Access Mode: Standard Alternate

Inspector Status: Enable Disable

Section 508 Support:

Allow Access to AGIS (Bing Maps + ESRI): Licenses Available for Use: Unlimited Licenses in Use:

Allow Access to AMO: Licenses Available for Use: Unlimited Licenses in Use:

Allow Access to AW: Licenses Available for Use: Unlimited Licenses in Use:

User cannot log in to AA and does not consume an AA license:

User Group/Privilege * :

Asset Management Solution Modules

Licenses Available for Use: Unlimited	Licenses in Use: 29
Module	User Groups
<input type="checkbox"/> AMS	<input checked="" type="radio"/> 13215- AMSAdmin <input checked="" type="radio"/> 13216- AMSPublicUser

Save Cancel

4. Complete the fields as described in [Table 27: User Fields](#).

5. In the **User Group/Privilege** section, mark the check box next to each module you want the user to be able to access.
6. For each module that you marked, choose the user group you want to assign the user to within that module. A single user can belong to only one user group for each module.

7. Click **Save**.

Table 27: User Fields

Access Mode	Mark either the Standard or Alternate option. In Standard access mode, pop-up windows sometimes display. In Alternate access mode, Civic Platform displays information in a new window instead of in pop-up windows. This accommodates users who depend on accessibility devices to interpret the content of web pages, because these devices typically cannot interpret the JavaScript used with pop-up windows.
-------------	---

Account Disable Time Frame	Enter the number of days a user account can remain inactive before it becomes disabled. Enter this value as a non-negative integer. When the number of days since the Last Login Date is greater than the value in this field, the account becomes disabled. Mark the Enable option for the Status field to manually reactivate an account. If you leave this field blank, Civic Platform uses the agency account disable time frame. If both the user and agency Account Disable Time Frame fields are blank, Civic Platform uses the default value of 90 days.
Billing Rate	Enter the billing rate per hour for the user.
Cashier ID	Enter the cashier identification number for the user. Civic Platform uses this number in the receipt number to identify the cashier and workstation. The ID number must be no more than 10 characters.
Confirm Password	This field displays on the User Profile Edit page; Civic Platform uses this field together with the New Password field to change a user password. Enter the same password you typed in the New Password field.
Daily Inspection Units	Enter the units the user is available for inspections each day. Typically, a unit is one hour.
Department	Use this button to choose the department that this user belongs to. You must choose all six levels or organization. For the user account of a contract inspector or a self-certified inspector, this field is ready-only and Civic Platform sets the department to <agency>/<agency>/<agency>/PUBLIC/NA/NA/NA.
Display Initials in Citizen Access	Civic Platform uses this field to indicate the display of the user's initials in Citizen Access. Mark the check box to display the user's initials or clear the check box to display the user's name in Citizen Access.
Distinguished Name	If you previously authorized this user for a LDAP services, enter the LDAP identifier. Agencies often use LDAP as user's repository.
Email	Enter the user's email address. Public users in Citizen Access can have permissions to view the email address provided in this field to notify the agency user of the completion of an action item or an inspection.
Employee ID	Enter the ID, abbreviation, or code your agency uses to represent this user.
Initial	Enter the user initials you want displayed in Civic Platform. For example, initials display as an indication of who re-scheduled an inspection or completed a task in workflow. Clear this field if you do not want user initials to display.
Initial (Default)	This is a read-only field displaying the default user initials based on the user's first, middle, and last name.
Inspector Status	You can identify users as inspectors and assign them to inspections. Mark the Enable option to identify users as inspectors; otherwise, mark the Disable option. For the user account of a contract inspector or a self-certified inspector, Civic Platform marks the Enable option by default.
Integrated	This field displays only if you are integrating an Active Directory user into Civic Platform. Mark Yes if you want to add an integrated user. Mark No if you do not want to add an integrated user.
IVR User Number	An interactive voice response user number automatically generates in this field.
IVR Pin Number	Enter the user's IVR pin number.

Last Login Date	This read-only field automatically populates with the most recent date the user logged into their account. When an agency administrator manually changes the Status from Disabled to Enabled , this field resets.
Mobile Phone	Enter the user's mobile phone number.
New Password	This field displays on the User Profile Edit page; Civic Platform uses it together with the Confirm Password field to change a user's password. Enter the user's new password in this field. Then, enter this same password into the Confirm Password field. Note that the password strength indicator displays a visual representation of the password security strength against the agency's minimum password requirements. If you have trouble entering a valid password, click the Requirements link to view the agency's minimum password requirements.
Password	Enter any combination of alphanumeric characters that the new user wants to use to log in to Civic Platform. As a security measure, Civic Platform displays an asterisk instead of the actual characters you enter. Note that the password strength indicator displays a visual representation of the password security strength against the agency's minimum password requirements. If you have trouble entering a valid password, click the Requirements link to view the agency's minimum password requirements. You cannot use special characters (@ * ! % \$ #) in a password.
Password Change	Use these options to determine who sets the user's password when the old password expires. Select the By User option to allow users to change their own password when their previous password expires. Select the By Administrator option to require the administrator to change passwords. This field defaults to agency settings. If your agency allows users to change their passwords, Civic Platform automatically selects the By User option. If your agency requires an administrator to change passwords, Accela Automation automatically selects the By Administrator option.
Password Time-out Time Frame	Enter the number of days a user password can remain valid before Civic Platform requires a password change. Enter this value as a non-negative integer.
Preferred Channel	Select which contact information to expose as the preferred method of contact on Accela's Contractor app. Choices include Email, Mobile Phone, Office Phone (uses Agency level phone number), and None (default).
Section 508 Support	If you want to enable the Accessibility mode for the user, mark the check box next to the field; otherwise, clear the check box. For more information about configuration and usage instructions for the Accessibility features in Civic Platform and Citizen Access, see the <i>Accessibility Configuration and Compliance Guide</i> .
Status	If you want the user to be able to access Civic Platform, mark the Enable option; otherwise, mark the Disable option.
Title	Enter the user's job title. For example, enter "Building Inspector" or "Supervisor."
User cannot log in to Civic Platform and does not consume a Civic Platform license	When selected, the user cannot log in to Civic Platform with this account, and does not need a Civic Platform license. However, the user can log in to Accela apps with this account but he must obtain an Mobile Office license for app access. For user accounts of public users, Civic Platform selects the check box by default. When cleared, the user must obtain a Civic Platform license and can log in to Civic Platform with this account. If the user wants to log in to Accela apps with this account, the user must also obtain an Mobile Office license.

User Group Permission	Use this section to define user access permissions, and to assign the user to the appropriate user groups. Select each module for which you want to grant access. Select each user group for which you want to grant access.
User Login ID	Enter a unique combination of alphanumeric characters that the new user wants to use to log in to Civic Platform. You cannot use special characters (@ ! # \$ % *) in a login ID. You can, however, use the underscore symbol.
User must change Password at next Logon	Use these settings to control when you want the user to change their password. Select Yes to force the user to change their password at next login; which is best practice if you feel the password is not secure. Select No to allow the user to change the password when they reach the designated password Time-out Time Frame.
User Name	Enter the first, middle, or last name of the user.

Viewing a User

You can search for any user on your system, including those that you previously disabled. If you are using Active Directory and integrating users, you can also search for Active Directory users. You might need to search for a user to update information or change the user's status. You can also view all users.

To view users

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose **User Profile > User**.

Civic Platform displays the User—Search window.

3. To display all users, click the **Browse All Users** button.

4. To search for a user, complete the applicable fields:

User Login ID Enter the user login identification.

User Name Enter as much of the user name as you know.

Status Select the status types you are searching for.

Exclude Public Users Choose **Yes** to display only agency users. Choose **No** to display agency and public users.

5. Click **Submit**.

Civic Platform displays the User Browse window. If you have activated this feature, Active Directory users see a "Yes" in the Integrated column.

6. Click the red dot next to the user you want to view.

Civic Platform displays the User - Edit page.

Editing a User

After you create users in Civic Platform, you might need to change certain details about the user's profile. For example, you might need to update the users email address if it changes. If you use Active Directory, administrators can also either convert external users to Civic Platform users, or convert Civic Platform users to external users.

Although you cannot delete a user from Civic Platform, you can disable a user that should no longer have access to Civic Platform. This feature is useful when an employee leaves your agency.

To edit a user

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > User**.
3. Search for the user you want to modify. For instructions, see [Viewing a User](#).
4. If you use Active Directory, choose either Civic Platform user or External User, according to your agency's needs.
5. Update the fields as necessary. For a list of fields, see [Table 27: User Fields](#).
6. In the **User Group/Privilege** section, select each module you want the user to be able to access.
7. For each module that you select, choose the user group to which the user belongs within that module.



Note:

A single user can belong to only one user group for each module.

8. Click **Save**.

Civic Platform updates the user profile.

Setting a User's Default Module

Civic Platform provides enhanced user group management functionality, including the ability to: view and search all users in a group, add/remove a user from a group, move a user from one group to another, and view/change a user's default module setting.

Administrators can view and change users' default module settings using their Administrator login account to make such changes.

To view and change a user's default module setting

1. Log in to Civic Platform as an Administrator.
2. Navigate to **Classic Administration > User Profile > User**.

3. Edit the user profile to change the user's module setting:

User - Edit

Use this form to edit User.

Inspector Status: Enable Disable

Section 508 Support:

Allow Access to AGIS (Bing Maps + ESRI): **Licenses Available for Use: Unlimited**

Allow Access to AMO: **Licenses Available for Use: Unlimited**

Allow Access to AW: **Licenses Available for Use: Unlimited**

User cannot log in to AA and does not consume an AA license:

Default Module * : Building

User Group/Privilege * :

Asset Management Solution Modules

Licenses Available for Use: Unlimited **Licenses in Use: 17**

Setting a User Account Disable Time Frame

Configure your system to disable individual user accounts that are inactive for a set period of time. When an account becomes disabled, the user must contact the agency administrator, who can manually reactivate accounts. To manually enable an account, see [Manually Enabling a User Account](#).

You can set account disable time frames at the agency and the individual user level. The user account disable time frame defaults to the agency-level account disable time frame, if you specified one. If you have not set an agency disable time frame, Civic Platform uses the default time frame of 90 days. Any value you set at the user level overrides the default value or the agency value. If the Account Disable Time Frame field in a User Profile is blank, Civic Platform defaults to the agency-level time frame. For information on setting an agency-level account disable time frame, see “Adding an Agency” in the Civic Platform On-premise Administrator Supplement.

To set an account disable time frame

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
 2. Choose **User Profile > User**.
 3. Search for the user profile for which you want to create an account disable time frame. For instructions, see [Viewing a User](#).
 4. In the **Account Disable Time Frame** field, enter the number of days an account can be inactive before it becomes disabled.
 5. Click **Save**.
- Civic Platform updates the user profile and begins checking its activity.

Setting a User Password Time-out Time Frame

You can require users to regularly change their password to increase your system’s security. If you choose to allow users to change their own password, they begin receiving messages prompting them to change their password 15 days before it expires. Users can change their password immediately, at a later log in, or at any time during their Accela session. If users fail to change their password within the time frame, they

must change their password or have it changed by their administrator before they can log in. To change a password during an Accela session, see [Changing a User Password](#).

You can set password time-out time frames at the individual user level, and multi-agency administrators can set a password time-out time frame at the agency level. Any value set at the user level overrides the default time frame or the agency time frame, if you have set one. If the Password Time-out Time Frame field in a user profile is blank, Civic Platform defaults to the agency-level time frame. If you have not set an agency time frame, the default value is 90 days. For information on setting an agency-level account disable time frame, see “Adding an Agency” in the “Agencies and Functions” chapter in the Civic Platform On-Premise Administrator Supplement.

To set a password time-out time frame

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > User**.
3. Search for the user profile for which you want to create a password time-out time frame. For instructions, see [Viewing a User](#).
4. Complete the following fields:

Password Time-out	Enter the number of days that a password can remain active.
Password Change	Select By User to allow users to change their own passwords. Select By Administrator to only allow agency administrators to change passwords. For information on changing a password, see Changing a User Password .
Must Change Password	Civic Platform automatically sets this option to Yes after the password time-out time frame has passed. When the user or the administrator changes the password, Civic Platform sets this option to No . You can also set this option manually.
Next Login	

5. Click **Save**.

Civic Platform updates the user profile and begins monitoring its password time-out time frame.

Manually Enabling a User Account

After a user account becomes inactive longer than the agency or user account disable time frame, or if the account password has expired, the user cannot access Civic Platform. The agency administrator must manually enable the account.

To manually enable a disabled account

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > User**.
3. Search for the user profile you want to enable. For instructions, see [Viewing a User](#).
4. Select **Enable** in the **Status** field.
5. Click **Save**.

Civic Platform clears the Last Login Date field and enables the user account.

Changing a User Password

When you set the password time-out time frame, you can choose to allow users to change their own passwords or require that administrators change their password. For instructions on setting a password time-out time frame, see [Setting a User Password Time-out Time Frame](#).

To change a user password

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > User**.
3. Search for the user profile you want to change the password for. For instructions, see [Viewing a User](#). Civic Platform displays the User - Edit page.
4. Complete the following fields:

New Password	Enter the new password for this user. If you experience trouble entering a valid password, click the Requirements link to view your agency's minimum password requirements.
--------------	---



Note:

The password strength indicator displays a visual representation of your password security strength against the agency's minimum password requirements.

Confirm Password	Enter the new password again.
------------------	-------------------------------

5. Click **Save**.

Civic Platform updates the user's password

Synchronizing External User Data

You can synchronize external user data with user data already in your agency's database. To do this, you must add an Active Directory server to your Civic Platform security policies. After you do this, when a user logs in and Civic Platform validates their credentials, Civic Platform compares the external user data with the existing user data on the Civic Platform server and updates the Civic Platform data as needed. Administrators can also add external users to the Civic Platform database if you activate this feature. Additionally, administrators can either convert external users to Civic Platform users, or convert Civic Platform users to external users. For instructions, see [Editing a User](#).



Note:

An administrator user (ADMIN) and public users cannot be external users.

The Civic Platform user login procedure authenticates the user directly against the Civic Platform database. When an external user logs in, Accela sends the authentication request to the external source for validation. If the user passes the validation, Civic Platform compares the attributes of the external source and the Civic Platform database. If there are any changes in the external source, Civic Platform corrects the data in the Civic Platform database.

Because this procedure affects the Civic Platform database, it also affects all Accela products, including add-ons. This means that all external users who Civic Platform has validated using this process can log in to products such as Civic Platform, Accela Wireless, or Citizen Access.

Topics

- [Adding an Active Directory Server](#)
- [Integrating a User from Active Directory](#)

Adding an Active Directory Server

To synchronize external user data with user data already in your agency's database, you must add an Active Directory server to your Civic Platform security policies.

To add an Active Directory server

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose **Agency Profile > Security Policy**.

Civic Platform displays the Agency Security Policies—Select Policy page.

[Agency Security Policies](#)
[Policy - Select Policy](#)
[Application Type Security](#)
[Workflow Task Security](#)
[Inspection Type Security](#)
[Inspection Default Value Policy](#)
[Inspection Type and Status Security](#)
[Condition Type Security](#)
[EDMS Access Security](#)
[External User Policy](#)

3. Click the **External User Policy** link.

Civic Platform displays the Agency Security Policies page.

[Agency Security Policies](#)
[Policy - External User Policy](#)
Scope - Agency

Provider URL * :	<input type="text"/>
Provider Port * :	<input type="text"/>
Access User Name * :	<input type="text"/>
Access User Passwd * :	<input type="password"/> •••••
Access User OU * :	<input type="text"/>
Access User DC * :	<input type="text"/>
OU Filter * :	<input type="text"/>
Additional Directory Entries:	<input type="text"/>
Status * :	<input type="button" value="Enable"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>

4. Complete the External User Policy fields. For a list of field descriptions, see [Table 28: External User Policy Fields](#).

5. Click **Save**.

Table 28: External User Policy Fields

Provider URL	Enter the IP address of the external user server for the specified domain controller. For example, enter the LDAP server URL. You can use SSL LDAP with “ldaps://” URL.
Provider Port	Enter the external user server's IP port for LDAP access to Active Directory. This port number is usually 389.
Access User Name	Enter the ID of the user who can access Active Directory when performing a search to add new integrated users. Enter the CN (common name) from the DN of the access user entry.
Access User Passwd	Enter the password for the user ID that can access Active Directory.
Access User OU	Enter the base organization unit you want to use for searches. Access User OU is the location within Active Directory where Civic Platform should search for users. The Active Directory administrator provides this information.

Access User DC	Enter the DC (domain component) of the parent entry of the access user entry. The Active Directory administrator provides this information.
	<p> Note: Civic Platform accesses the LDAP server with the following user information: CN=<Access User Name>,<Access User OU>,<Access User DC>.</p>
OU Filter	Required. OU Filter defines the organization unit from which to filter users in the Access User DC and Additional Directory Entries from the LDAP server. If undefined, Civic Platform searches all the OUs in the Access User DC and the Additional Directory Entries. You can specify multiple filters, separated by comma, joined by OR.
Additional Directory Entries	Enter more organization units from which to retrieve user entries. Note that you must specify the DC and root of each organization unit. In case you want to enter multiple additional organization units, separate them by comma.
Status	To use Active Directory to synchronize the Civic Platform server, select Enable from the drop-down list; otherwise, select Disable .

Integrating a User from Active Directory

You can synchronize existing external user data with user data already in your agency's database. After you have added an Active Directory server to your Civic Platform security policies, you can search for external users to add to your database. You can also indicate the department and user group to which an added external user belongs.



Note:

An administrator user (ADMIN) and public users cannot be external users.

To integrate a user from Active Directory

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > User**.
Civic Platform displays the User—Search page.
3. Click **Add**.
Civic Platform displays the User—Add page.
4. Select **External User**.
Civic Platform displays the External User Search button on the User—Add page.

User - Add

Use this form to add User.

AA User External User

User Login ID *:

Distinguished Name *:

User Name: First Mi Last

Initials:

Display Initials in ACA:

Title:

Employee ID:

Email:

Phone Number:

IVR User Number: 00000020301

IVR Pin Number:

Department *:

Billing Rate: 0.0 (\$/hour)

Daily Inspection Units:

Cashier ID:

Status: Enable Disable

Last Login Date:

Access Mode: Standard Alternate

Inspector Status: Enable Disable

Section 508 Support:

Allow Access to AGIS (Bing Maps + ESRI): Licenses Available for Use: Unlimited Licenses in Use: 482

Allow Access to AMO: Licenses Available for Use: Unlimited Licenses in Use: 147

Allow Access to AW: Licenses Available for Use: Unlimited Licenses in Use: 146

User cannot log in and does not consume user licenses:

Save **Cancel**

5. Click the External User Search button.

Civic Platform displays the External User—Search page.

External User - search

Use this form to search external User

OU Search Root: (E.g. OU=IT)

Common Name:

Surname:

Search **Cancel**

6. Complete any of these fields:

- | | |
|----------------|---|
| OU Search Root | Enter the base organization unit to search. |
| Common Name | Enter the given, or first, name of the user you want to locate. |
| Surname | Enter the family, or last, name of the user you want to locate. |

7. Click Search.

Civic Platform displays the search results.

Use this form to select an external user

< pages: 1 >						Search	Cancel
Common Name	Given Name	Surname	Title	Distinguished Name	Integrated		
jack	jack	zhang	Sr.Engineer	CN=jack,OU=test,DN=local	Yes	Select	
jack1	jack1	zhang	Sr.Engineer	CN=jack1,OU=test,DN=local	No	Select	
< pages: 1 >						Search	Cancel

8. Click **Select** for the user that you want to integrate from Active Directory.

Civic Platform auto-populates the User Login ID field with the selected user.



Note:

If you specify an Active Directory attribute (for example, Common Name) in the Standard Choice DEFAULT_USER_LOGIN_ID, Civic Platform uses the attribute value of the selected user to populate the User Login ID field. Otherwise, Civic Platform uses userPrincipalName of the selected user from Active Directory to populate the field.

9. Do one of the following:

- Enter the department that you wan to associate the integrated user with.
- Click the **Department** button to choose a department from a list and click **Submit**.

10. In the **User Group/Privilege** section, select each module you want the user to be able to access.

11. For each module that you selected, choose the user group to which the user belongs within that module.



Note:

A single user can belong to only one user group for each module.

12. Click **Save**.

Civic Platform displays a confirmation massage indicating that you successfully integrated the user.

Managing Contacts, Licensed Professionals, and Public Users

Civic Platform divides contacts into two categories: reference contacts that serve as the reference database, and daily contacts that users add to records. Best practice is to manage contact types by defining only generic reference contact types, such as Individual and Organization. Record each individual or organization as one reference contact. Then link reference contacts to records in various roles, such as Applicant, License Holder, etc. This enables you to easily track all the transactional and reference information about every individual and organization.

After you implement Civic Platform, you might need to add new licensed professionals, as appropriate for your agency. After you add a licensed professional, users can search for the licensed professional when creating or editing an application.

Anyone who uses the public facing portion of Citizen Access, IVR, or other Accela add-on products are called public users. Public users include Anonymous Users and Registered Users who either navigate the agency's Citizen Access website or who use IVR and follow the call flow. System administrators can control which functions are available for both types of public users.

Click a topic title below for full details.

Related Information

[Establishing People Templates](#)

[Managing Licensed Professionals](#)

[Managing Contacts](#)

[Creating a Public User Account](#)

[Searching for a Public User Account](#)

[Managing Accounts for Registered Agencies](#)

[Editing a Public User Account](#)

[Associating Addresses, Parcels, and Owners with Public User Accounts](#)

[Changing a Public User Password](#)

[Managing Licenses Associated with Public User Accounts](#)

Establishing People Templates

Topics

- [Creating a People Template](#)
- [Adding People Fields to Forms](#)
- [Searching for a Template](#)
- [Editing a Template](#)
- [Adding an Attribute to a People Template](#)
- [Editing an Attribute](#)
- [Setting Values for a People Template Drop-down List](#)
- [Applying Shared Drop-down Lists](#)

Creating a People Template

When you create a new template, you determine the name, type, and description of the template. There are three main types of people templates: contact, professional, and Public User. You can define contact types and professional types in Standard Choices.

To create a template

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose People > People Template.
3. Click **Add**.
4. Complete the necessary fields as described in [Table 29: People Record Template Fields](#).
5. Click **Submit**.
6. Add one or more attributes to the template. For instructions, see [Adding an Attribute to a People Template](#).
7. Add the People template data to the various People forms. For instructions, see [Adding People Fields to Forms](#).

Adding People Fields to Forms

After you create your new People Template you must add this template data to the various “People” forms to enable users to see your new agency-defined People fields.

To add template data to forms

1. Navigate to the appropriate people tab (Contacts or Professionals) on the Record detail portlet.
2. To open the detail form, click the link to the contact or professional.
3. To add the new field to the form, choose *Menu* > *Edit View*.
4. From the list of fields, click **Template Data**.
5. Click **OK**.
6. In the *Effect Scope* section, set the user access.
7. Click **Save**.

Searching for a Template

You can search for any template defined on your system, including templates that you previously disabled. For example, you might need to search for a template to update information or to change the status of the template.

To see a list of all the templates on your system, click **Submit** without entering details about an individual template.

To search for a Template

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose People > People Template.
3. Complete the necessary fields as described in [Table 29: People Record Template Fields](#).
4. Click **Submit**.

Civic Platform displays the People Template—Browse window.

5. Click the red dot that appears next to the template that you want.

Table 29: People Record Template Fields

Template Name	Enter the template name.
Template Type	Select the type of template you want to find. For example, if you want to find a template for a billing contact, choose “Billing Contact.” Except for “Public User,” which is hard-coded into the drop-down list, Civic Platform pulls the other values from the values you set up as Standard Choice values for Contact Types and Licensed Professional Types. You can set up additional template types in these Standard Choices, as needed.
Description	Enter a description of the template that you want.
Status	Choose the current mode of the template you are searching for.

Editing a Template

After you create a template, you might need to change the description or status. You can also edit any attributes for the template. You can provide agency users with the ability to edit licensed professional template fields on detail and reference detail forms. This feature is available in both Civic Platform and Citizen Access. For more information on how to configure this feature, see [Editing a Template](#).



Note:

You cannot change the template name or its type, but you can add a new template and disable any templates that you no longer use.

To edit a template

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose People > People Template.
3. Search for the template that you want.
4. Click Edit to the right of the Template Information section.
Civic Platform displays the People Template—Edit window.
5. Complete the necessary fields as described in [Table 29: People Record Template Fields](#).
6. Click **Submit**.
7. Add one or more attributes to the template.
8. Edit any existing attributes for the template, as needed. For instructions, see [Editing an Attribute](#).

Adding an Attribute to a People Template

Each attribute that you define for the template shows up as an additional field. If the attribute is of contact or licensed professional type, the additional field shows up when you add or edit a contact or licensed professional of the same type as your template. If the attribute is of Public User type, the additional field displays on the Account Registration page and Contact Information section on the Account Management page.

If you add a drop-down list attribute to a template, you must set up the values that you want to include in the list. Users can then choose from the values when adding or updating contacts or professionals on your system.

To add an attribute to a people template

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose People > People Template.
3. Search for the template that you want.
4. Click **Add**.
5. Complete the necessary fields as described in [Table 30: People Record Template Attribute Fields](#).
6. Click **Submit**.

Table 30: People Record Template Attribute Fields

Attribute Name	Enter the name of the attribute.
Label	Enter the label for the attribute that you want to display when a user adds or edits contact information.
Data Type	Use the drop-down list to define the data information type for the field. For example, Text, Numeric, Date, or DropDownList. If you are populating field information by EMSE, you must choose the DropDownList data type for the attribute.
Description	Enter a description of the attribute that helps to identify its purpose.
Default Value	If you want to supply a default value, enter it here. If you are setting up a drop-down list, you can add values to the drop-down list so that a user has multiple values to choose from.
Unit	If you want to attach a unit such as square feet, dollars, or miles to the first field value, enter it here. Choose from standard choices.
New Unit	If the unit you want is not in the drop-down list, type in the new unit here.
Data Type	Choose the type of the attribute. You can choose from Date, Number, Radio, Text, or Drop-down List.
Display Order	Enter a number to determine the position of the first field in your Application Specific Information group. For example, if you want the field to display before any other fields, enter “1.”
Required Flag	If you want the record attributes to be mandatory for the people template, select Yes; otherwise, select No.
Citizen Access Display Configuration	Select the appropriate option(s) for implementation in Citizen Access. Indicate if you want the people template, such as the contact template, to be available on an online application intake form, a search form, or on the record detail page. Also, indicate if you want the template fields to be editable on both the record detail page and on the intake form. For more information, refer to the “Record Inquiry” chapter in the <i>Citizen Access Administrator Guide</i> .
Display in Citizen Access Lists	If you want to display the attribute as a column header in the People lists, such as Licensed Professional list, in Citizen Access, select Yes ; otherwise, select No . Civic Platform displays attributes with this option set to Yes in Citizen Access as one of the available options of column headers of the People lists. Administrators can set the option to be visible in the People lists. For complete information on how to set an attribute to be a column header, see the “Working with Web Pages” chapter in the Citizen Access Administrator Guide.
Status	If you want to let users see this field in Civic Platform, select Enabled ; otherwise, select Disabled .

Editing an Attribute

After you create a template, you might need to change it. You can update any attributes within the template by changing the label, data type, and any other features about the attribute.



Note:

You cannot change the attribute name or delete the attribute after you save it. You can add a new attribute and disable attributes that you no longer use, as needed.

To edit an attribute

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose People > People Template.
3. Search for the template that you want.
4. Click the red dot that appears next to the attribute that you want to edit.
5. Complete the necessary fields as described in [Table 30: People Record Template Attribute Fields](#).
6. Click **Submit**.

Setting Values for a People Template Drop-down List

You can add an attribute to a template that displays as a drop-down list. After you add a drop-down list attribute to a template, you must set up the values that you want to include in the list. You can also apply a drop-down list with preconfigured values, known as a shared drop-down list, to a template attribute. For more information, see [Applying Shared Drop-down Lists](#).

To set up values for a people template drop-down list

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose People > People Template.
3. Search for the template that you want. For instructions, see [Creating a People Template](#).
4. Click **Edit** next to the drop-down list attribute that you want.
Civic Platform displays a page where you can add, delete, or update drop-down list values.
5. Do one or more of the following:
 - To add a new value, click **Add**, enter the value in the Attribute Value field, then Click **Save**.
 - To update an existing value, enter the value, and then Click **Update**.
 - To delete a value, click **Delete**.
6. Click **Close** to return to the People Template—Detail window.

Applying Shared Drop-down Lists

You can apply a drop-down list with preconfigured values, known as a shared drop-down list, to a template attribute. Shared drop-down lists provide a useful way of capturing information that is generic to multiple people templates or people information tables.

For more information on creating shared drop-down lists, see [Customizing Menus, Tabs, and Drop-down Lists](#).

To apply a shared drop-down list

- Locate the People template to which you want to apply a shared drop-down list. For instructions, see [Searching for a Template](#).
 - Click the red dot next to the template to which you want to apply a shared drop-down list.
- Civic Platform displays the People Template Detail page.

People Template - Detail
Use this form to edit People Template.

Template Information							
Template Name: PERMIT OWNER Template Type: Owner Description: Status: Enable							
Attribute Information							
Label	Description	Unit	Data Type	Required Flag	ACA Display Configuration	Display in ACA Lists	Status
• 1			Text	No	Hide	No	Enable
• 2			DropdownList	No	Hide	No	Enable
• 3			Date	No	Hide	No	Enable
• NUMBER			Number	No	Hide	No	Enable
• RADIO			Radio	No	Hide	No	Enable

Add **Cancel**

- Click Edit next to the drop-down list you want to modify.
- Civic Platform displays the People Template Drop-down List Add page.

Accela Automation: ContactDropDownList - R0088-E - Windows Internet Explorer

Attribute Template Name: PERMIT OWNER	
Attribute Type: Owner	
Attribute Name: 2	
<input type="checkbox"/> Use Shared Drop Down Lists:	<input type="text"/>
Search	
Add	Close

- Click **Use Shared Drop-down Lists**.
- Do one of the following:
 - Click **Search** to return all shared drop-down lists.
 - Enter the first letter of the drop-down list, or enter any other search criteria, then click **Search**. Civic Platform returns the Shared Drop-down List Browse page.

Shared Drop Down List - Browse
Use this form to search for a Shared Drop Down List.

Name

SHARED_OCCUPANCY_2010	Select
SHARED_CONST_TYPE_2010	Select
RULE_TYPES	Select
SHARED_CATEGORY_ARCHIVE	Select
SHARED_CATEGORY_COMMERCIAL	Select
SHARED_CATEGORY_DEFERSUB	Select
SHARED_CATEGORY_DEFERSUB_RES	Select
SHARED_CATEGORY_DEMO	Select
SHARED_CATEGORY_HSG_RENTAL	Select
SHARED_CATEGORY_HSG_RENTAL_RES	Select

< 1 2 3 4 >

Search **Close**

- Click **Select** next to the drop-down list you want to apply.



Note:

You can only select one shared drop-down list.

Civic Platform returns to the People Template Drop-down List Add page with the Field Values from the shared drop-down list listed in blue.

7. Click **Update**.

Managing Licensed Professionals

Topics

- [Adding Licensed Professionals](#)
- [Searching for a Licensed Professional](#)
- [Editing a Licensed Professional](#)

Adding Licensed Professionals

After you implement Civic Platform, you might need to add new licensed professionals, as appropriate for your agency. After you add a licensed professional, users can search for the licensed professional when creating or editing an application.

A licensed professional can have the same license number for multiple license types, such as Electrical, Mechanical, and Plumbing licenses.



Note:

Depending on how you set up the licensed professional type, you might see other attributes or other fields, in addition to the standard attributes listed here.

To add a licensed professional

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose People > Licensed Professional.
3. Click **Add**.
4. Use the **License Type** drop-down list to choose the appropriate license type.
Civic Platform displays fields specific to the license type you chose.
5. Complete the fields specific to the license type you chose. For a list of common fields, see [Licensed Professional Fields](#).
Civic Platform pulls these values and fields from the values you set up as Standard Choices for LICENSED_PROFESSIONAL_TYPE. Refer to the *Civic Platform Configuration Reference*.
6. Click **Submit**.

Table 31: Licensed Professional Fields

Address	Enter the licensed professional's street address.
Address 3	Any additional address information.
Bond #	If the licensed professional holds a bond, enter the bond number.
Business License #	Enter the official number that identifies the business license issued to the professional by a local agency or a jurisdiction, such as a city. A licensed professional can have the same license number for multiple license types, such as an Electrical, Mechanical, or Plumbing license.

Business License Expiration Date	Enter the date when the business license is due to expire, or use the Date button to find the date on a calendar.
Business Name	Enter the name of the business associated with the business license.
City	Enter the city name or click Get City to choose the city from a standard list.
Comment	Enter any comments about the business license or licensed professional.
Comp Insurance Company Code	Enter the code associated with the Worker's Compensation Insurance Company. For example, Worker's Compensation Fund (WCF). Limit to 30 characters.
Contact Name	Enter the first, middle, or last name of the licensed professional. "F/M/L" stands for First/Middle/Last.
Contractor Business Name	Enter the contractor business name in the text field, if applicable. For example, AJ's Construction. Limit to 65 characters.
Contractor License Number	Enter the contractor's license number. Limit to 30 characters.
Email	Enter the licensed professional's email address.
Fax	Enter the licensed professional's fax number.
FEIN	If applicable, enter the licensed professional's federal Employer Identification Number.
Insurance Amount	Enter the cost, in dollar amounts, of the insurance policy.
Insurance Company	Enter the name of the licensed professional's insurance carrier.
Insurance Expiration Date	Enter the date when the insurance policy is due to expire, or use the Date button to find the date on a calendar.
License Expiration Date	Enter the date when the business license is due to expire, or use the Date button to find the date on a calendar.
License Issue Date	Enter license's issued date; you can click the Date button to locate the date on a calendar.
License Last Renewal Date	Enter the license's last renewal date; you can click the Date button to find the date on a calendar.
License Number	Enter the official number that identifies the business license issued to the professional by a local agency or a jurisdiction, such as a city.
License State	Choose the state that issued the professional business license.
License Type	Choose the type of license the professional holds.
Licensing Board	Choose the licensing board. For example, the Louisiana State Licensing Board for Contractors.
Phone	Enter the licensed professional's phone number.
Policy #	Enter the insurance policy number.
SSN	Enter the licensed professional's social security number.
State	Choose a state.
State License #	Enter the official number that identifies the business license issued by the state. If the licensed professional is an owner of a licensed food facility, enter the Alt ID field value of a record that conducts the inspection of the food facility. For more information about food facility inspection, see "Customizing Food Facility Inspection Search" in the Citizen Access Administrator Guide. Note: You can create a sequence definition for this field based on licensed professional type should an applicant fail to provide a number here. You must configure the People Number in the Sequence Mask Definition portlet. For information on how to create a mask, see Setting Up Number Sequences and Masks . For information on how to create a licensed professional type, see Accela Civic Platform Configuration Reference .

Status	If you want to let users search for this professional, select Enable ; otherwise, select Disable .
Type	Select the licensed professional type, and the organization the licensed professional belongs to. You can also select Individual.
Worker's Comp Exempt	Choose a value from the drop-down list. Yes indicates the licensed professional is exempt from Worker's Comp. No indicates they are not.
Worker's Comp Expiration Date	Use the picker to enter the expiration date of the Worker's Compensation Insurance Policy.
Worker's Comp Policy #	Enter the policy number for the Worker's Compensation Insurance. Limit of 30 characters.
Zip	Enter the ZIP code of the licensed professional.

Searching for a Licensed Professional

You can search for any licensed professional registered on your system, including professionals that you previously disabled. For example, you might need to search for a professional to update information or to change the status of the professional.



Note:

To see a list of all the professionals on your system, click **Submit** without entering details about an individual professional.

To search for a licensed professional

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
 2. Choose People > Licensed Professional.
 3. Complete the **License Type** field.
 4. Complete the fields specific to the license type you chose.
 5. For a list of common fields, see [Licensed Professional Fields](#).
 6. Do one of the following:
 - If you do not want to search using the license type specific fields, click **Submit** under the City field.
 - If you want to search by license-type information, complete the fields at the bottom of the window and click **Submit** at the bottom of the window.
- Civic Platform displays the results for your search.*

Editing a Licensed Professional

You can change information about individual professionals as necessary. For example, you might need to change a professional's status to "disabled" after the professional's license expires. A licensed professional can have the same license number assigned to multiple license types, such as Electrical, Mechanical, and Plumbing licenses. To duplicate a license number for a new professional license type, you must add a new licensed professional record.



Note:

Depending on how you set up this licensed professional type, you might see additional attributes and fields in addition to the standard attributes listed here.

To edit a professional

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose People > Licensed Professional.
3. Search for the professional that you want to edit. For instructions, see [Searching for a Licensed Professional](#).
4. Click the red dot next the professional you want to edit.
Civic Platform displays the Licensed Professional—Edit window.
5. Complete the fields as necessary. For a list of common fields, see [Licensed Professional Fields](#).
6. Complete the fields specific to the license type you are working with.
7. Click **Save**.

Managing Contacts

Civic Platform divides contacts into two categories: reference contacts that serve as the reference database, and daily contacts that users add to records. Best practice is to manage contact types by defining only generic reference contact types, such as Individual and Organization. Record each individual or organization as one reference contact. Then link reference contacts to records in various roles, such as Applicant, License Holder, etc. This enables you to easily track all the transactional and reference information about every individual and organization.

Before users add new reference contacts or associate contacts with records, you must set a number of Standard Choices to define the ways of managing contacts in Civic Platform, such as CONTACT TYPE, AUTO_SYNC_PEOPLE, and INDIVIDUAL_CONTACT_MATCH_CRITERIA. For instructions on configuring the Standard Choices, refer to the *Accela Civic Platform Configuration Reference*.

Users often look up existing reference contacts to associate the desired one with a record. You can specify contact identity fields to guarantee the uniqueness of each reference contact, and specify contact address identity fields to guarantee the uniqueness of each contact address in each contact.

By default, users have full access to all contact types from within all modules and the reference Contact portlet. If a contact type is available for a few modules, then you can limit the use of the contact type by module through specifying the applicable module in the Contact Type Setting portlet. For more information, see [Setting Up Security Policies](#).

Topics

- [Managing Contact Identifier Settings](#)
- [Adding a Contact](#)
- [Searching for a Contact](#)
- [Editing a Contact](#)
- [Enabling Close-Match Searches](#)

Managing Contact Identifier Settings

Topics

- [Managing Contact Address Identifier Fields](#)
- [Managing Reference Contact Identifier Fields](#)

Managing Contact Address Identifier Fields

You can configure one or more contact address identifier fields. Civic Platform checks whether a contact address is a duplicate of an existing active contact address in the same contact by comparing their identifier field values (joined by AND), and prevents users from saving duplicate contact addresses.

By default, there are no contact address identifier fields in Civic Platform. After you add several contact address identifier fields, Civic Platform executes the duplicate contact address checking in the following ways.

- When users add or update a duplicate contact address to a contact, an error message displays indicating the conflict.
- When you sync a record contact with a reference contact, if an address in the record contact duplicates with an address in the reference contact, the address in the reference contact replaces the contact address.
- When users add new contact addresses to replace old addresses, if the new address duplicates with an active one in the same contact, Civic Platform uses the existing active contact address as a replacement
- In previous versions, users were able to create duplicate contact addresses. Civic Platform automatically filters duplicate contact addresses when users look up and select contact addresses to add in records.

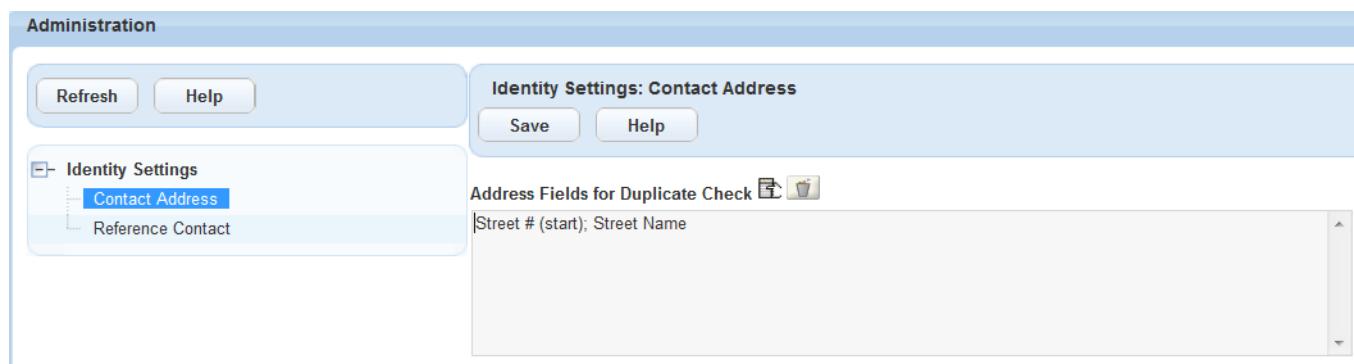
To manage the contact address identifier fields

1. Access the Identity Settings portlet ([Accessing the Contact Identity Settings Portlet](#)).

Civic Platform displays the Identity Settings portlet.

2. Expand the Identity Settings node in the navigation tree, and then click Contact Address.

The Identity Settings portlet displays the list of contact address fields that you previously set as identifier fields.

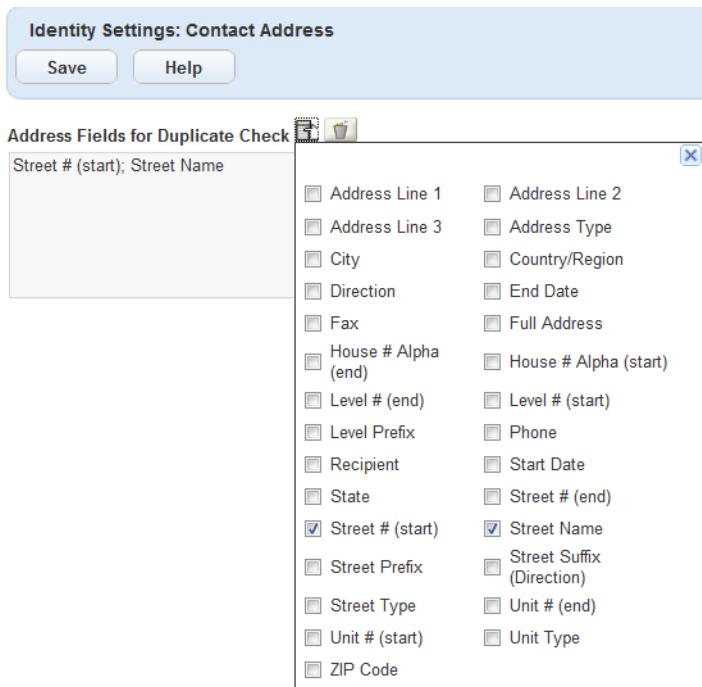


All the contact address identifier fields, joined by AND, work as one identifier in duplicate contact address checks.

3. To modify the selection of identifier fields

- a. Click the field selector next to the Address Fields for Duplicate Check label.

Civic Platform displays the list of contact address fields that you can set as identifier fields. The available field options include all the contact address fields, except for Status, Primary, Validate, and Contact Address ID.



- b.** Select the fields you want to set as identifiers.

- c.** Click the Close button.

Civic Platform updates the contact address identifier fields according to your latest selection.

To clear the selection of identifier fields

- a.** Click the recycle bin icon next to the field selector.

Civic Platform clears the current selection of identifier fields.

- 4.** Click the Save button to save the changes.

Managing Reference Contact Identifier Fields

You can choose to define a number of contact fields as reference contact identifier fields. [Table 32: Possible Reference Contact Identifier Fields](#) lists your options. Civic Platform checks whether a reference contact is a duplicate of an existing active contact by comparing their identifier field values and thus prevents users from saving duplicate contacts. To set the comparison rule with the identifiers, Civic Platform joins by OR the contact fields that you add separately as identifiers, and joins by AND the fields that you combine and add as one identifier.

By default, there are no contact identifier fields in Civic Platform. After you add several contact identifier fields, Civic Platform executes the duplicate reference contact checking in the following way.

- When users add or update a reference contact that has duplicate identifier field value with an existing reference contact, an error message displays indicating the conflict.

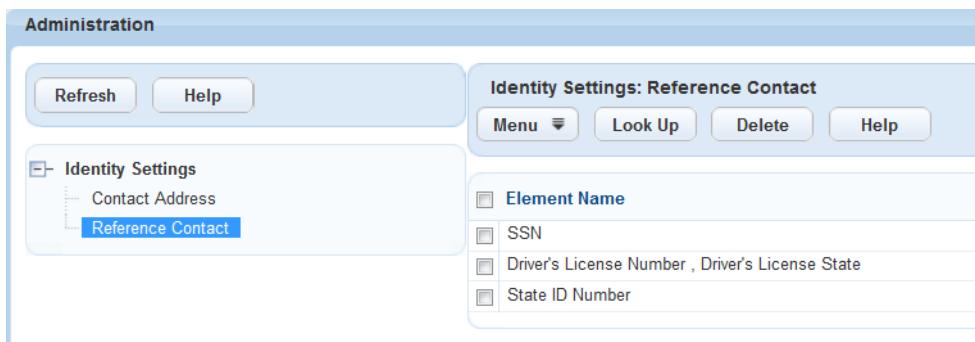
To manage the contact identifier fields

- Access the Identity Settings portlet ([Accessing the Contact Identity Settings Portlet](#)).

Civic Platform displays the Identity Settings portlet.

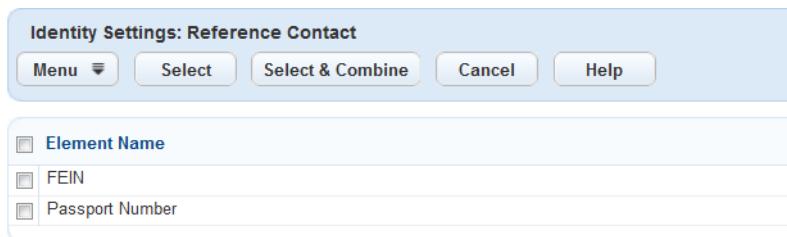
- Expand the Identity Settings node in the navigation tree, and then click Reference Contact.

The Identity Settings portlet displays the list of identifier fields.



3. To add an identifier field, click Look Up to add a contact field from [Table 32: Possible Reference Contact Identifier Fields](#).

Civic Platform displays the list of fields you can add as identifier fields.



4. Select the field, and then click Select. If you want two or more fields to work as one identifier (joined by AND), select several fields, and then click Select & Combine.

Civic Platform adds the selected fields as identifiers. If a user attempts to add a reference contact that contains an email address that exists in another contact record, Civic Platform prevents the user from saving the duplicate contact and displays the following notification.

Contact: Melissa Cheng

Action failed. The following field values duplicate with existing Reference Contact. These are identity fields that must have unique values for each Reference Contact.
E-mail : martha.liu@achieveo.com

Contact Type	<input checked="" type="radio"/> Individual	<input type="radio"/> Organization
Type *Required	Reference Contact ID	
--Select--	791416	
Contact Status	Enabled	
First Name	Middle Name	Last Name
Melissa		Cheng

5. To remove an identifier field, select the identifier field and click **Delete**.

Civic Platform no longer regards the field as an identifier field.

Table 32: Possible Reference Contact Identifier Fields

Identifier Field	Description
Email	The email address of the contact.

Identifier Field	Description
FEIN	This acronym stands for Federal Employer Identification Number and identifies a business for tax purposes. This field is only active when the Contact Type selected is Organization.
Driver's License Number	The driver's license number of the contact.
Driver's License State	The driver's license state of the contact.
Passport Number	The contact's passport number.
SSN	The contact's Social Security Number. This field is only active when the Contact Type selected is Individual.
State ID Number	The contact's state ID number.

Adding a Contact

To enable users to search for a contact, you must add the contact to your reference database. Your reference database acts like a library that lets users search for certain types of stored information. For example, users might need to search for an existing contact when creating a new application.



Note:

Depending on how you set up this contact type, you might see additional attributes and fields. You can add or edit attributes using the people template.

To add a contact

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose People > Contact.
3. Click **Add**.
4. Use the **Contact Type** drop-down list to choose the appropriate contact type.
Civic Platform displays fields specific to the contact type you chose.
5. Complete the fields as described in [Table 33: Contact Fields](#).
6. Click **Save**.

Table 33: Contact Fields

Address	Enter up to three lines of the contact's address information.
City	Enter the city name or click the Get City button to choose from a standard list of cities.
Comment	Enter any comments regarding the contact.
Contact Relationship	Choose the appropriate relationship between the contact and the application.
Contact Type	Choose the appropriate contact type.
Country	Enter the country.
Email	Enter the contact's email address.
Fax	Enter the contact's fax number.
FEIN	Federal Employer Identification Number (FEIN) associated with the contact. You can leverage this field when performing searches for a record or eliminating duplicate contact entries in your database.

Flag	Enter the status of the hold. For example, if the hold is still active, enter "Y" for Yes.
Hold Code	If your agency places holds on certain contacts, enter the code that identifies the hold here. For example, if a contact has bad credit, enter "Bad Credit."
Hold Description	If you enter a hold code, enter a description to help identify the code. For example, enter "Contact has repeatedly failed to pay bills."
ID	Enter any other form of ID to help you identify the contact. For example, enter a driver license number or a social security number.
Name	Enter the First, Middle, or Last name of the contact.
Organization Name	Enter the name of the organization to which the contact belongs.
Phone	Enter one or two phone numbers of the contact.
SSN	Contact Social Security Number. After saving, the number only displays the last 4 digits. For example ***-**-1234. You can leverage this field when performing searches for a record or eliminating duplicate contact entries in your database.
State	Choose the state.
Status	If you want to let users search for this contact, select Enable ; otherwise, select Disable .
Title	Enter the contact's title. A title indicates an official position or professional/academic qualification. For example: Mr., Mrs., Ms., Officer, RN, PhD, DDS, Professor, Judge, or Notary. The Title field is a text field.
Zip	Enter the contact's ZIP code.

Searching for a Contact

You can search for any contact on your system, including contacts that you previously disabled. For example, you might need to search for a contact to update information or to change the status of the contact.



Note:

To see a list of all the contacts on your system, click **Submit** without entering details about an individual contact.

To search for a contact

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose People > Contact.
3. Complete the fields as described in [Table 33: Contact Fields](#).
4. Do one of the following:
 - If you do not want to search using the contact type specific fields, click **Submit** under the City field.
 - If you want to search by contact-type information, enter the information in the fields at the bottom of the window and Click **Submit**.

Civic Platform displays the results of your search.

Editing a Contact

After you add a contact to your reference database, you might need to change certain information about the contact.

**Note:**

Depending on how you set up this contact type, you might see additional attributes or fields in addition to the standard attributes listed here.

To edit a contact

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose People > Contact.
3. Search for the contact that you want.
4. Complete the fields as described in [Table 33: Contact Fields](#).
5. Click **Save**.

Enabling Close-Match Searches

Configure contact match criteria to enable close-match searching in Civic Platform, Citizen Access, and Mobile Office.

Close-match searching enables users to locate reference contacts that do not exactly match their search criteria, but come close. The standard search function returns reference contacts that exactly match user's search criteria. In some cases, users might find that the search results do not include the contacts they intend to find, for example, if the user mistypes the criteria. In that case, users can click the Close Matches button to locate reference contacts that do not exactly match their search criteria, but come close.

To enable close-match searching, configure the following standard choices in the Standard Choices portlet in the Setup Admin:

- ENABLE_CONTACT_ADDRESS
- INDIVIDUAL_CONTACT_MATCH_CRITERIA
- ORGANIZATION_CONTACT_MATCH_CRITERIA

See the Civic Platform Configuration Reference for more information about Standard Choices.

Creating a Public User Account

Topics

- [Adding a New Public User Account](#)
- [Using a Reference Professional to Create a Public User](#)

Adding a New Public User Account

To create a registered public user account

1. Access the Public User portlet ([Accessing the Public User Portlet](#)).
 2. Click **New**.
- Civic Platform displays a blank registration template in the detail portlet.

3. Complete the registration fields. For a description for each field, see [Table 34: Public User Registration Fields](#).

4. Click **Submit**.

Citizen Access displays the new registration information in the Public User list portlet.

5. Associate the public user with a reference contact ([Managing Contacts Associated with Public User Accounts](#)). If a public user does not have an association with a reference contact, the account remains disabled in the registered agency.

Table 34: Public User Registration Fields

Civic Platform User Account	<p>This field displays the Civic Platform user login ID in read-only. When a public user registers an account from Citizen Access or when you create an account from the Public User portlet, Civic Platform automatically creates the corresponding Civic Platform user account with the login ID numbered like PUBLICUSER{seq_number}. Civic Platform automatically does the following in user profiles for such user accounts:</p> <ul style="list-style-type: none"> Marks the user as External User Sets the department to <agency>/<agency>/<agency>/PUBLIC/NA/NA/NA Categorizes the user into the default user group for public users in each module. Within each assigned module, the external inspector is available for inspection assignments and scheduling. Sets the inspector status to “Enable”, if the user account is for a contract inspector or a self-certified inspector. <p>For the Civic Platform user accounts of contract inspectors and self-certified inspectors, your agency can update the user profiles manually or using an EMSE script.</p> <p>For example, use an EMSE script either with the <i>AddContractLicenseAfter</i> or <i>RegistrationSubmitAfter</i> event to set the district that the inspector is responsible for, set the discipline based on the inspector’s license, and so forth.</p> <p>The <i>AddContractLicenseAfter</i> event occurs after you associate a licensed professional with the public user account of an external inspector through the Public User portlet and the association takes affect. The <i>RegistrationSubmitAfter</i> event occurs after a public user submits a registration and also occurs after the external inspector associates a licensed professional with his public user account through Citizen Access.</p> <p>For more information about the Civic Platform user account, see Configuring Organizations, Departments, and Users.</p>
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Account Type	<p>There are five account types of public users.</p> <p>Citizen: Citizens are common public users in your agency. Citizen users access Citizen Access to apply for and pay for permits, schedule inspections, and find information. Citizen is the default in this field.</p> <p>Authorized Agent: Authorized agents conduct authorized service sales (for example, fishing and hunting license sales) in Citizen Access.</p> <p>Authorized Agent Clerk: When authorized agents manage their accounts in Citizen Access, they can authorize clerks to conduct authorized service sales. You can view, but cannot create authorized agent clerks in the Public User portlet.</p> <p>Self-Certified Inspector: Self-certified inspectors upload inspection results using Citizen Access. Self-certified inspectors are certified or licensed professionals so you must associate at least one licensed professional to the public user account from the Public User portlet. You can also let self-certified inspectors themselves associate licensed professionals with their public user accounts through Citizen Access. For details, see “Understanding Inspectors” in the <i>the Accela Civic Platform Concepts Guide</i>.</p> <p>Contract Inspector: Contract inspectors upload inspection results using Citizen Access. Contract inspectors are certified or licensed professionals or businesses so you must associate at least one licensed professional to the public user account from the Public User portlet. You can also let contract inspectors themselves associate licensed professionals with their public user accounts through Citizen Access. For details, see “Understanding Inspectors” in the <i>Accela Civic Platform Concepts Guide</i>.</p>
Cell Phone	The public user's cellular phone number.
Change Password at Login	Select Yes to ask the public user to change password at the first time login. Otherwise, select No.
Email	The public user's email address. By default, this is the User ID. You can modify both the User ID and the email address separately.
Password	<p>The public user's password used when logging in to Citizen Access.</p> <p>Note: If your agency has configured password rules for the public users, then there is a password requirements link and a strength indicator. The password strength indicator displays a visual representation of the password security strength against the agency's minimum password requirements.</p> <p>If you have trouble entering a valid password, click the Requirements link to view the agency's minimum password requirements.</p>
Confirm Password	A second entry to verify the user's password.
Password Request Answer	Enter the answer to the password request question. The field maps to the Answer field on the registration page in Citizen Access.

Password Request Question	<p>Enter one or more password request questions. The field maps to the Enter Security Question field on the registration page in Citizen Access. The Authentication by Security Question setting in Citizen Access Admin determines the number of password request questions to display in this field.</p> <p>If an account has password request questions and answers and the public user forgets their password, Citizen Access requires the user to answer one of the questions to validate the user.</p> <p>If an account has no password request question, Citizen Access only requires the user to specify the email address in the reset-password request.</p> <p>Password Request Questions may be a non-required field in Civic Platform. However, if a user logs in to Citizen Access with an account that has no password request question, an Update Security Question and Answer section displays for the user to specify one or more security questions and answers.</p>
Receive SMS Message	Mark or clear the check box to enable or disable SMS messaging for the public users. This feature applies to agencies that implement custom SMS interfaces.
User ID	The user identification for logging in to Citizen Access. The default User ID is the email address provided in registration. You can modify this field to create a unique User ID.

Using a Reference Professional to Create a Public User

You can configure the EMSE sample script *REFLICPROFADDAFTER* to create a public user account to associate with a licensed professional a user enters at application-intake. The reference professional must have an email address associated with it, for this feature to work. After the intake process, EMSE initiates the public user account registration process for the referenced professional associated with the email address. Civic Platform sends an activation email. When you activate the account, Civic Platform sends the registration confirmation email to the professional. For information on the public user registration process, including the configurations for the activation email, refer to the “Registration” chapter in the *Citizen Access Administrator Guide*.



Note:

An Accela Implementation specialist or a system administrator who has received training from an Accela Implementation specialist or a Product Manager should write the script for this feature. Improperly written scripts can seriously damage your system by incorrectly altering or deleting data for many records. For information on writing and implementing scripts, see the *Accela Civic Platform Scripting Guide*.

Searching for a Public User Account

To search for a public user account

1. Access the Public User portlet ([Accessing the Public User Portlet](#)).
2. Click **Search**.
Civic Platform displays a search form.
3. Enter any search criteria in the appropriate fields.

You can search by public user registration fields, and a few contact standard fields. Civic Platform searches for the public users that meet the specified registration criteria, and who have associations with a contact that meets the specified contact criteria. For a description of the fields, see [Table 35: Fields for Searching Public User Accounts](#).

4. Click Submit.

Civic Platform displays the list of public users that match your search criteria.

Table 35: Fields for Searching Public User Accounts

Account Type	There are five account types of public users. Citizen: Citizens are common public users in your agency. Citizen users access Citizen Access to apply for and pay for permits, schedule inspections, and to find information. Citizen is the default in this field. Authorized Agent: Authorized agents conduct authorized service sales (for example, fishing and hunting license sales) in Citizen Access. Authorized Agent Clerk: When authorized agents manage their accounts in Citizen Access, they can authorize clerks to conduct authorized service sales. You can view, but cannot create authorized agent clerks in the Public User portlet. Self-Certified Inspector: Self-certified inspectors upload inspection results using Citizen Access. Self-certified inspectors are certified or licensed professionals so you must associate at least one licensed professional to the public user account from the Public User portlet. You can also let self-certified inspectors themselves associate licensed professionals with their public user accounts through Citizen Access. For details, see “Understanding Inspectors” in the <i>Accela Civic Platform Concepts Guide</i> . Contract Inspector: Contract inspectors upload inspection results using Citizen Access. Contract inspectors are certified or licensed professionals or businesses so you must associate at least one licensed professional to the public user account from the Public User portlet. You can also let contract inspectors themselves associate licensed professionals with their public user accounts through Citizen Access. For details, see “Understanding Inspectors” in the <i>Accela Civic Platform Concepts Guide</i> .
Address Line 2	The address information of the contact that has an association with the public user. You can have up to three lines of address information.
Authorized Agent	If you select “Authorized Agent Clerk” option in the Account Type field, you can specify the name of the authorized agent who created the authorized agent clerks. Civic Platform supports fuzzy string searching on the field.
Birth Date	The birth date of the contact associated with the public user.
Change Password at Login	Select Yes to ask the public user to change password at the first time login. Otherwise, select No.
City	The city of the contact associated with the public user.
Confirm Password	The public user’s password. A password confirmation/verification.
Country/Region	The country or region of the contact associated with the public user.
DBA/Trade Name	The DBA or trade name of the contact associated with the public user. DBA is an acronym for Doing Business As.
FEIN	The FEIN information of the contact associated with the public user. FEIN is an acronym for Federal Employer Identification Number; it identifies a business for tax purposes.
First Name	The first name of the contact associated with the public user.
Gender	The gender of the contact associated with the public user.
Last Name	The last name of the contact associated with the public user.
Middle Name	The middle name of the contact associated with the public user.
Organization Name	The organization name of the contact associated with the public user.
P.O.Box	The post office box number of the contact associated with the public user.

Password	The public user's password used when logging in to Citizen Access.
	<p> Note: If your agency has configured password rules for the public users, then there is a password strength indicator and a requirements link. The password strength indicator displays a visual representation of the password security strength against the agency's minimum password requirements.</p> <p>If you experience trouble entering a valid password, click the Requirements link to view the agency's minimum password requirements.</p>
Password request answer	The answer to the password request question.
Password request question	Choose a password request question from the drop-down list. If a public user forgets their password, they can answer this question. If the answer is correct, Civic Platform emails their password to the email provided from registration.
Phone 3	The phone of the contact associated with the public user.
Preferred Channel	The method by which the contact associated with the public user, prefers to receive notifications, for example by phone, email, fax, or postal mail.
Public User's Cell Phone	The public user's cellular phone number.
Public User's Email	The public user's email address. By default, this is the User ID. You can modify both the User ID and the email address separately.
Receive SMS Message	Click this option to enable or disable SMS messaging for the public users. This feature applies to agencies that implement custom SMS interfaces.
Salutation	The salutation to address the public user or the contact associated with the public user, for example Mr. or Ms.
SSN	The SSN of the contact associated with the public user.
State	The state of the contact associated with the public user.
Street Address	The street address of the contact.
Telephone	The telephone of the contact associated with the public user.
Type	The contact type of the contact associated with the public user.
User ID	The user identification for logging in to Citizen Access. The default User ID is the email address provided in registration. You can modify this field to create a unique User ID.
Zip Code	The ZIP code of the contact associated with the public user.

Managing Accounts for Registered Agencies

To register a public user in an agency, you must associate at least one enabled reference contact in the settagency with the public user account, and then enable and activate the public user account for the agency.

Topics

- [Managing Contacts Associated with Public User Accounts](#)
- [Enabling or Disabling an Account](#)
- [Activating a Public User Account](#)

Managing Contacts Associated with Public User Accounts

Follow the instructions below to manage the associations between public user accounts and contacts. You can associate a contact with a public user; approve, reject, or remove the association; or set a contact as the account owner of a public user.

Topics

- [Associating Contacts with a Public User Account](#)
- [Setting an Associated Contact as the Account Owner](#)

Associating Contacts with a Public User Account

To associate contacts with a public user account

1. Access the Public User portlet ([Accessing the Public User Portlet](#)).
2. Select the user account you want to edit.
Civic Platform displays the public user account registration details.
3. Click the **Contact** tab.
Civic Platform displays the Contact list portlet.
4. Do any of the following:
 - To search and associate a contact with a public user account.
 1. Click **Look Up**.
Civic Platform displays the contact search form.
 2. Enter your search criteria and then click **Submit**.
Civic Platform displays a list of reference contacts meeting the search criteria.
 3. If you cannot find the contact in the results list, click **Close Matches** to view the close matches to the search criteria, and select the contact from the close match contacts.
The Standard Choices INDIVIDUAL_CONTACT_MATCH_CRITERIA and ORGANIZATION_CONTACT_MATCH_CRITERIA define the close match criteria respectively for individual contacts and reference contacts. See the *Accela Civic Platform Configuration Reference* for more information about Standard Choices.
 - 5. Select the contact that you want to associate with the public user.
 - 5. Click **Connect**.
Civic Platform links the contact with the public user account.
For contacts directly added in the public user portlet, Civic Platform approves the association by default.
- To approve the association between a contact and the public user account.
 1. Select the contact.
 2. Click **Approve**.
- To reject the association between a contact and the public user account.
 1. Select the contact that you do not want to approve the association.
 2. Click **Reject**.

Civic Platform rejects the association.



Note:

A public user account must have at least one approved contact association to stay enabled, so you cannot reject an association if it is the only one with the approved status in an enabled public user account.

- To delete the association between a contact and the public user account.
 1. Select the contact that you want to remove.
 2. Click **Delete**.

Civic Platform deletes the contact from the public user account.

Setting an Associated Contact as the Account Owner

A public user may be associated with more than one contact, but only one contact can be the account owner of the public user. Public users can designate or change the account owner in their accounts on the Account Management page in Citizen Access. You can also designate or change the account owner of a public user account following the instruction in this section.



Note:

If your agency enables the Automatically Activate New Association feature in Citizen Access, the first contact added to an account is the account owner of the account by default. If an account is created in a version earlier than 7.3 FP2 or with the Automatically Activate New Association feature disabled, there is no default account owner in the account.

When you add variables (for example, \$\$firstName\$\$, \$\$middleName\$\$, \$\$lastName\$\$) about the public user contact information in notification templates, Civic Platform uses the following priority order to decide from which contact, out of all the contacts that have approved association with the public user, to get the variable values:

- Priority one, the account owner of the public user
- Priority two, the first individual contact that has the same email address as the account
- Priority three, the first organization contact that has the same email address as the account
- Priority four, the first individual contact that has approved association with the account
- Priority five, the first organization contact that has approved association with the account

For more information about how to create notification templates, see [Working with Communication Manager](#).

To change the account owner of a public user

1. Access the Public User portlet ([Accessing the Public User Portlet](#)), and select the user account you want to edit.
Civic Platform displays the public user account registration details.
2. Click the **Contact** tab.
Civic Platform displays the Contact list portlet.
3. Select an approved contact which you want to set as the account owner of the public user.
4. Click **Set as account owner**.

Civic Platform changes the account owner of the public user to be the current contact.

Enabling or Disabling an Account

To enable or disable a public user account

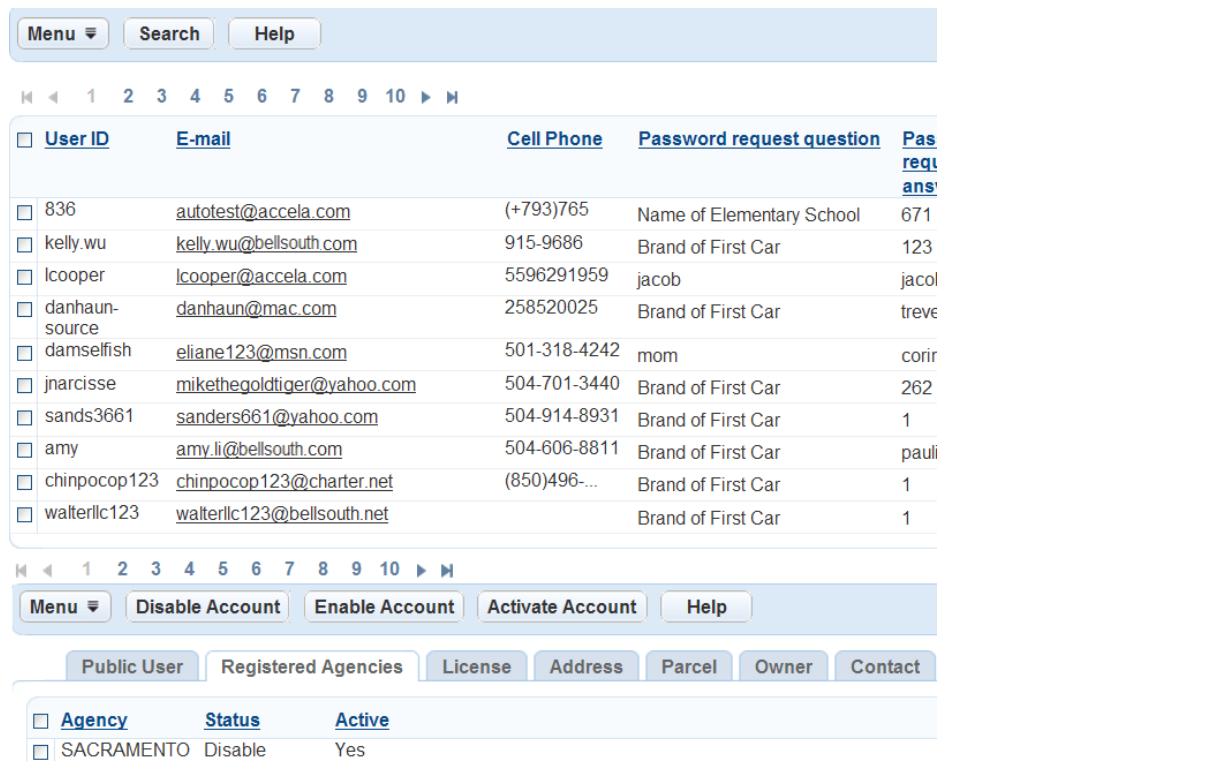
1. Access the Public User portlet ([Accessing the Public User Portlet](#)).

2. Click the user account which requires a change of status.

Civic Platform displays the public user account registration details in the detail portlet.

3. Click the **Registered Agencies** record tab.

4. Select the Agency that requires a change status.



The screenshot shows the Civic Platform Public User portlet. At the top, there is a menu bar with 'Menu', 'Search', and 'Help' buttons. Below the menu is a navigation bar with page numbers from 1 to 10. The main area contains a table with columns: 'User ID', 'E-mail', 'Cell Phone', 'Password request question', and 'Pas'. There are 12 rows of data, each with a checkbox next to the User ID. The table has a horizontal scroll bar at the bottom. Below the table is another navigation bar with page numbers from 1 to 10. Underneath this is a second menu bar with 'Disable Account', 'Enable Account', 'Activate Account', and 'Help' buttons. Below the menu bar is a tab navigation bar with 'Public User' (selected), 'Registered Agencies', 'License', 'Address', 'Parcel', 'Owner', and 'Contact'. The 'Registered Agencies' tab is currently selected. A table below it shows 'Agency', 'Status', and 'Active' columns. One row is visible: 'SACRAMENTO', 'Disable', and 'Yes'. A note icon is present on the left side of the table.

User ID	E-mail	Cell Phone	Password request question	Pas
836	autotest@accela.com	(+793)765	Name of Elementary School	671
kelly.wu	kelly.wu@bellsouth.com	915-9686	Brand of First Car	123
lcooper	lcooper@accela.com	5596291959	jacob	jacob
danhaun-source	danhaun@mac.com	258520025	Brand of First Car	treve
damselfish	eliane123@msn.com	501-318-4242	mom	corir
jnarcisse	mikethegoldtiger@yahoo.com	504-701-3440	Brand of First Car	262
sands3661	sanders661@yahoo.com	504-914-8931	Brand of First Car	1
amy	amy.li@bellsouth.com	504-606-8811	Brand of First Car	pauli
chinpocop123	chinpocop123@charter.net	(850)496....	Brand of First Car	1
walterllc123	walterllc123@bellsouth.net		Brand of First Car	1

Agency	Status	Active
SACRAMENTO	Disable	Yes

Note:

If you have enabled the multiple agency administration feature (see [Setting Up Cross-Agency Operations](#)), after a public user attempts to log in to Citizen Access hosted by a different agency from the one that created the account, you can enable and activate the public user account in the new agency.

If you enable an authorized agency or authorized agent clerk account in a different agency from the one that created the account, the account type is Citizen, not Authorized Agent nor Authorized Agent Clerk, in the new agency.

5. Click one of the following buttons to change the status of an account.

Disable Account. Click this button to disable the public user for the agency. Disable, in this context, means that the public user is not able to log in to Citizen Access.



Note:

If you disable an authorized agent account, the authorized agent account becomes inactive, and all the authorized agent clerk accounts created by the agent account become inactive as well.

Enable Account. Click this button to enable the public user to use the account for the agency. Civic Platform displays a message indicating a status change.

Activating a Public User Account

Topics

- Activating the Public User Account
- Using EMSE to Activate a Public User

Activating the Public User Account

If your agency does not use the activation email, your agency can activate an account manually for a user in the Public User portlet. For example, if an account requires additional information before the agency allows activation, you can manually activate their account for public users after the additional information arrives at the agency in the Public User portlet.

To activate a public user account

1. Access the Public User portlet ([Accessing the Public User Portlet](#)).
2. Click the user account which requires activation.
Civic Platform displays the public user account registration details in the detail portlet.
3. Click the **Registered Agencies** record tab.
4. Select the Agency that requires activation for this account.
5. Click **Activate Account**.

The screenshot shows two parts of the Civic Platform interface. The top part is a list of user accounts with columns for User ID, E-mail, Cell Phone, Password request question, and Password answer. The bottom part is a detailed view of a specific account, showing tabs for Public User, Registered Agencies, License, Address, Parcel, Owner, and Contact. The Registered Agencies tab is selected, showing an 'Agency' column with 'SACRAMENTO' and a 'Status' column with 'Disable' and 'Yes'.

User ID	E-mail	Cell Phone	Password request question	Password answer
836	autotest@accela.com	(+793)765	Name of Elementary School	671
kelly.wu	kelly.wu@bellsouth.com	915-9686	Brand of First Car	123
lcooper	lcooper@accela.com	5596291959	jacob	jacob
danhaun-source	danhaun@mac.com	258520025	Brand of First Car	treve
damselfish	eliane123@msn.com	501-318-4242	mom	corir
jnarcisse	mikethegoldtiger@yahoo.com	504-701-3440	Brand of First Car	262
sands3661	sanders661@yahoo.com	504-914-8931	Brand of First Car	1
amy	amy.li@bellsouth.com	504-606-8811	Brand of First Car	pauli
chinpocop123	chinpocop123@charter.net	(850)496....	Brand of First Car	1
walterllc123	walterllc123@bellsouth.net		Brand of First Car	1

Public User **Registered Agencies** **License** **Address** **Parcel** **Owner** **Contact**

Agency	Status	Active
SACRAMENTO	Disable	Yes

Civic Platform displays the account is active and the user has permission to log in to Citizen Access for that agency.

Using EMSE to Activate a Public User

Your agency can activate a public user account using an EMSE script. The script works with the ApplicationSubmitAfter event to activate the public user in the agency, activate licenses for the public user, and send out the activation email to the user. For example, an applicant comes to the counter to apply for a license. While submitting the application users receive the option of creating a Citizen Access account so that they can track progress. The counter clerk selects the option “Create online account.” EMSE creates the online account and email the link, login, and password to the applicant.

For more information on EMSE scripts, see the *Accela Civic Platform Scripting Guide*.

To activate a public user account through EMSE scripting

1. Refer to the sample EMSE script below to activate a public user account, activate any licenses associated with the account, and send the activation emails to the public user.

```
//Get the Service Provide Code.  
  
var servProvCode = Accela Automation.env.getValue("servProvCode");  
  
//Get the Universally Unique Identifier for public user verification.  
  
var uuid= Accela Automation.env.getValue("UUID");  
  
//Activate Public User by servProvCode and uuid.  
  
var result = Accela  
Automation.publicUser.activatePublicUser(servProvCode,uuid);  
  
if(result.getSuccess())  
{  
    //If Activate Public User Successesfully, then print the User ID.  
  
    Accela Automation.print(result.getOutput());  
  
}  
  
else  
{  
    //If Activate fail, then print the error message.  
  
    Accela Automation.print(result.getErrorMessage());  
}
```

Editing a Public User Account

You can make edits to a public user account if it requires modification. For example, if a user wants to reset their password or change their user ID, you can update their user account registration information with the specified request.

To edit a registered public user account

1. Access the Public User portlet ([Accessing the Public User Portlet](#)).
2. Click the user account that you want to edit from the PublicUser list portlet.
Civic Platform displays the public user account registration details in the detail portlet.
3. Enter the modifications in the applicable fields. For a description of each field, see [Table 34: Public User Registration Fields](#).
4. Click **Submit**.
5. Click **Registered Agencies** record tab.
6. Click the appropriate button from the toolbar to reflect the desired status for the account. For more information about account status, see [Changing a Public User Password](#).

Associating Addresses, Parcels, and Owners with Public User Accounts

Public users can create public user accounts when they register to access Citizen Access. Administrators can then link the public user account to addresses, parcels, and owners, exposing features as appropriate. This linked relationship is particularly useful when the public user initiates an application in Citizen Access. He or she can use the Auto-Fill drop-down list to populate the address details into the application intake form with one click.

Associating an Address with an Account

After you have created address records, you can use the Associated Public User tab to associate one or more public users to an address, or to disassociate one or more public users from an address.

Public users can create public user accounts when they register to access Citizen Access. Administrators can then link the public user account to addresses, exposing features as appropriate. This linked relationship is particularly useful when the public user initiates an application in Citizen Access. He or she can use the Auto-Fill drop-down list to populate the address details into the application intake form with one click.

To associate an address with a public user account

1. Access the Public User portlet ([Accessing the Public User Portlet](#)).
2. Select the user account to which you want to edit.
Civic Platform displays the public user account registration details.

The screenshot shows the Civic Platform Public User portlet. At the top, there are buttons for 'Menu', 'Send Password', and 'Help'. Below that is a navigation bar with tabs: 'Public User' (which is selected), 'Registered Agencies', 'License', 'Address', 'Parcel', 'Owner', and 'Contact'. The main content area displays user profile information:

User ID lcooper	E-mail lcooper@accela.com
Password No	Confirm Password
Password request answer jacob	Password request question jacob
Change Password at Login No	Cell Phone Receive SMS Message 5596291959

3. Click the **Address tab.**

Civic Platform displays the Address list portlet.

4. Click **Look Up.**

Civic Platform displays the Address search form.

5. Enter your search criteria and then click **Submit.**

Civic Platform displays a list of addresses meeting the search criteria.

6. Select the address to which you want to associate the public user.

7. Click **Connect.**

Civic Platform links the address with the public user account.

8. Do any of the following:

- To view address details, click the link for the address that you want to view.
- To remove the link between an address and a public user, select the address you want to remove and click **Delete**.

Associating a Parcel with an Account

After you have created parcel records, you can use the Associated Public User tab to associate one or more public users to a parcel, or to disassociate one or more public users from a parcel.

Public users can create a public user account when they register with an agency through Citizen Access. Administrators can then link the public user account to parcels, exposing features as appropriate. This linked relationship is particularly useful when the public user initiates an application in Citizen Access. He or she can use the Auto-Fill drop-down list to populate the parcel details into the application intake form with one click.

To associate a parcel with a public user account

1. Access the Public User portlet ([Accessing the Public User Portlet](#)).

2. Select the user account to which you want to edit.

Civic Platform displays the public user account registration details.

The screenshot shows the Civic Platform interface with the 'Public User' tab selected. The page displays user registration information:

User ID lcooper	E-mail lcooper@accela.com
Password No	Confirm Password
Password request answer jacob	Password request question jacob
Change Password at Login No	Cell Phone Receive SMS Message 5596291959

3. Click the **Parcel** tab.

Civic Platform displays the Parcel list portlet.

4. Click **Look Up.**

Civic Platform displays the Parcel search form.

5. Enter your search criteria and then click **Submit.**

Civic Platform displays a list of parcels meeting the search criteria.

6. Select the parcel to which you want to associate the public user.

7. Click **Connect.**

Civic Platform links the parcel with the public user account.

8. Do any of the following:

- To view parcel details, click the link for the parcel that you want to view.
- To remove the link between a parcel and a public user, select the parcel you want to remove and click **Delete**.

Associating an Owner with an Account

For more information about Owners, refer to “Managing Owners” in the *Accela Civic Platform User Guide*.

For more information, refer to “User Role Definitions” in the “Module Settings” section of the *Citizen Access Administrator Guide*.

To associate an owner with a public user account

1. Access the Public User portlet ([Accessing the Public User Portlet](#)).

2. Select the user account to which you want to edit.

Civic Platform displays the public user account registration details.

The screenshot shows the Civic Platform interface with the 'Public User' tab selected. The page displays user registration information:

User ID lcooper	E-mail lcooper@accela.com
Password No	Confirm Password
Password request answer jacob	Password request question jacob
Change Password at Login No	Cell Phone Receive SMS Message 5596291959

3. Click the **Owner record tab.**

Civic Platform displays the owner list portlet.

4. Click **Look Up.**

Civic Platform displays the owner search form.

5. Enter your search criteria and then click **Submit.**

Civic Platform displays a list of Owners meeting the search criteria.

6. Select the owner to which you want to associate the publicuser.

7. Click **Connect.**

Civic Platform links the Owner with the publicuser account.

8. Do any of the following:

- To view owner details, click the link for the owner that you want to view.
- To remove the link between an owner and a public user, select the owner you want to remove and click **Delete**.

Changing a Public User Password

When users request that you reset their password in person or by phone, ask them their security question and verify the user's identity. Then, send the user the password email which contains the new Civic Platform generated password. The user's email address must be current for this to work properly.

If you want to customize the text of the email associated with changing the user password, refer to "Email Settings" in the "Creating Records" section of the *Citizen Access Administrator Guide*.

To reset a user password

1. Access the Public User portlet ([Accessing the Public User Portlet](#)).

2. Select the user which requires a resetting of their password.

Civic Platform displays user information in the Public User detail portlet.

User ID	E-mail
lcooper	lcooper@accela.com
Password	Confirm Password
Password request answer	Password request question
jacob	jacob
Change Password at Login	Cell Phone Receive SMS Message
No	5596291959

3. Click **Send Password to reset the password.**

Civic Platform displays a message indicating that it sent an email to the user with new password information.

Managing Licenses Associated with Public User Accounts

This feature requires you to customize the content of the renewal and new license emails in Citizen Access Admin on the General Settings page. For more information about customizing the content of the emails, see “Email Settings” in the *Citizen Access Administrator Guide*.

After you configure the emails, the agency can receive email notification that a license requires approval. Follow the instructions below to approve or reject a license for an account.

To manage licenses associated with a public user account

1. Access the Public User portlet ([Accessing 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 main sections of the Civic Platform interface. The top section is a grid view of user accounts, and the bottom section is a detailed view of licenses for a selected user. Both sections have navigation menus and tabs at the top.

User Accounts Grid:

<input type="checkbox"/> User ID	E-mail	Cell Phone	Password request question	Password request answer
<input type="checkbox"/> 836	autotest@accela.com	(+793)765	Name of Elementary School	671
<input type="checkbox"/> kelly.wu	kelly.wu@bellsouth.com	915-9686	Brand of First Car	123
<input type="checkbox"/> lcooper	lcooper@accela.com	5596291959	jacob	jacob
<input type="checkbox"/> danhaun-source	danhaun@mac.com	258520025	Brand of First Car	trevededieu
<input type="checkbox"/> damselfish	eliane123@msn.com	501-318-4242	mom	corina
<input type="checkbox"/> jnarcisse	mikethegoldtiger@yahoo.com	504-701-3440	Brand of First Car	262
<input type="checkbox"/> sands3661	sanders661@yahoo.com	504-914-8931	Brand of First Car	1
<input type="checkbox"/> amy	amy.li@bellsouth.com	504-606-8811	Brand of First Car	pauline
<input type="checkbox"/> chinpocop123	chinpocop123@charter.net	(850)496...	Brand of First Car	1
<input type="checkbox"/> walterllc123	walterllc123@bellsouth.net		Brand of First Car	1

Licenses Tab View:

<input type="checkbox"/> License Number	License Type	Status	Business Lic Exp Date	License #	Insurance Expiration Date	Policy #
<input type="checkbox"/> 888888	Architect	Enable				
<input type="checkbox"/> 13-PEOP-0...	Architect	Enable				
<input type="checkbox"/> 115051	Contractor	Enable				

4. Do any of the following:

- Add a license to a public user account.

1. Click **New**.

2. Select a license type, enter a license number, and then click **Submit**.

Civic Platform adds the license to the public user account.

- Search and associate a license with a public user account.
 1. Click **Look Up**.
Civic Platform displays the license search form.
 2. Enter your search criteria and then click **Submit**.
Civic Platform displays a list of licenses meeting the search criteria.
 3. Select the license to which you want to associate the public user.
 4. Click **Connect**.
Civic Platform links the license with the public user account.
- Approve a license.
 1. Select the licenses that require approval.
 2. Click **Approve**.
- Reject a license.
 1. Select the licenses that do not meet license requirements.
 2. Click **Reject**.
Civic Platform sends a confirmation email to the account.

Setting Up Cross-Agency Operations

If you manage multiple agencies you must set up the participating agencies individually first. We recommend that you work with the Accela Services team to formulate and incorporate best practices in the planning and establishment of the agencies.

For more information, see the “Agencies and Functions” chapter in the Civic Platform On-premise Administrator Supplement.

Click a topic title below for full details.

Related Information

[Enabling Multiple Agency Administration](#)

[Sharing APO and Contacts Across Agencies](#)

[Delegate User Management](#)

[Multi-Agency Service Management](#)

[Record Creation Across Agencies](#)

Enabling Multiple Agency Administration

You can enable multiple agency administration (aka Super Agency) by setting up the agencies in a common database.

When you have multiple agencies that work together, Civic Platform offers a way to brand each agency so that users can easily recognize the source agency of information. You do this by associating an image or logo with a Custom Fields Subgroup in the Logo portlets of Civic Platform.

Delegate User Management

For instructions on how to create a delegate user specific to a Citizen Access public user group, so that they have permissions to create records for multiple agencies, see [Creating a Delegate Account for a Public User Group](#).

Topics

- [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](#)

Creating a Delegate User

Civic Platform uses delegate user accounts, for users external to a particular agency, to enable user to access information across multiple agencies. The external user, for which you set up a delegate user

account, can access agency data (as a delegate) and super-agency data, for which they have a regular user account. You can relate the delegate user account to only one external agency user.

Example Use Case

The State of Oregon functions as a super agency for the Marion County agency, the city of Portland agency, and the city of Sandy agency. Betty Greenwood, an Oregon user, needs to access Marion County and Portland information, but not Sandy information. Marion County and Portland administrators each create a regular user account for Betty Greenwood, using Betty's unique user ID from Oregon, and designate this user account as a delegate user account for their agency.

from Civic Platform, Betty can now toggle between the Oregon, Marion County, and Portland agencies, but not the Sandy agency, to work with information owned by those agencies. The Marion County and Portland administrators can change or revoke Betty's access at any time; Civic Platform tracks changes to Betty's delegate user account.

To create a delegate user

1. Create a user account at your agency, designated for an external agency user, and then configure the permissions.
 - a. Access the Classic Administration page. [Accessing Classic Administration](#)
 - b. Navigate to **User Profile > User**.
 - c. Click **Add** and complete the user fields. Refer to [Adding a User](#).
 - d. In the User Group/Privilege section, select each module that you want the user to be able to access.
 - e. Assign which user group the external user belongs to for each module.
 - f. Click **Save**.
2. Define the Delegate user account. This account links the agency account with the external agency user account.
 - a. Access the Delegate User portlet.
 - b. Click **New**.
Civic Platform displays the New Delegate User portlet.
 - c. Complete the fields as described in [Delegate User Fields](#).
 - d. Click **Save**.

Table 36: Delegate User Fields

Allow Delegate User Login	Select this option if you want to allow delegate users to log in to your agency.
Delegate User ID	The delegate user's User ID that your agency created. Click the picker icon to search and select the User ID. Refer to .
Super Agency	Select the delegate user's primary agency location.
Parent User ID	Enter the delegate user's User ID at the primary agency. Click the picker icon to search and select this information.
Status	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

You can enable public users of Citizen Access to view information across agencies, or request services from multiple agencies, by creating delegate user accounts in the public user group.



Note:

Permissions do not apply to public users of Citizen Access.

To create a delegate account for a public user group

1. Create a user account at your agency designated for the public user group. You do not need to assign permissions.
 - a. Access the Classic Administration page. [Accessing Classic Administration](#)
 - b. Navigate to **User Profile > User**.
 - c. Click **Add** and complete the user fields. Refer to [Adding a User](#). You do not need to assign this user any permissions.
 - d. Click **Save**.
2. Define the Delegate user account. This account links the agency user account with the public user group.
 - a. Access the Delegate User Portlet.
 - a. Click **New**.
Civic Platform displays the New Delegate User portlet.
 - b. Complete the Delegate User fields as described below:

Delegate User ID	Use the picker icon to select the agency user account created for the public user group. Refer to .
Allow Delegate User Login	Select this option to allow public user access to multi-agency information.
Super Agency	Select the agency to which you want public users to have the multi-agency access.
Status	Select the delegate user status. Select Enable to activate or Disable to deactivate the delegate user account.
Parent User ID	Click the picker icon to search and select <i>PUBLICUSER</i> .
 - c. Click **Save**.

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 you establish the delegate user relationship. Enable or disable delegate user access to your agency at any time. For information on how to set up a new delegate user, see [Creating a Delegate User](#).

To enable a delegate user

1. Access the Delegate User portlet ([Accessing the Delegate User Portlet](#)).
2. Search and select a Delegate user. If there is no delegate user account, refer to [Creating a Delegate User](#).

Civic Platform displays the Delegate User detail portlet.

3. Select the option to allow the delegate user access to your system at login.
4. Click **Save**.

Searching and Editing Delegate User Information

You can search for and edit delegate user information at any time. For example, you can do this to inactivate a delegate user. Civic Platform stores changes to delegate user information in the Delegate User History portlet. Refer to [Viewing Delegate User History](#).

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 can change a user's access from full access to view only. Changing a user's access restricts a delegate user from making changes. See [Creating a Delegate User](#) or refer to [Editing a User](#).

To search for and edit delegate user information

1. Access the Delegate User portlet ([Accessing the Delegate User Portlet](#)).
2. Click **Search**.
Civic Platform displays the delegate user search portlet.
3. Enter search criteria in one or more of the delegate user fields and then click **Submit**. Refer to [Delegate User Fields](#).
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 [Delegate User Fields](#) for details regarding each delegate user field.
6. Click **Submit** to save changes.

Viewing Delegate User History

The delegate user history portlet provides a running history of the delegate user account. Delegate user history includes the operation name and corresponding date. For example, it shows the date when you created or reactivated the delegate user account. This portlet does not display changes to user permissions or any tasks that the delegate user performed. You can search and select historical information with the delegate user search feature.

You can search and select delegate user history in two different areas. You can select a delegate user from the list portlet and click the Delegate User History record tab. You can also click the Search History button located in the delegate user list portlet to search for a specific operation type, activity during a date range, or status of delegate users.

To view delegate user history

1. Access the Delegate User portlet ([Accessing the Delegate User Portlet](#)).
2. Choose any of these options:
 - View delegate user history from the Delegate User detail portlet.
 1. Search and select the delegate user for which you want to view history.
 2. Click the **Delegate User History** tab.
Civic Platform displays a list of delegate user history.

- View delegate user history from the Delegate User History search results.
 1. Click **Search History**.
Civic Platform displays the Delegate User History Search form.
 2. Enter the search criteria based on the field descriptions provided in [Delegate User History Fields](#) and click **Submit**.
Civic Platform displays a list of delegate users meeting search criteria.

Table 37: Delegate User History Fields

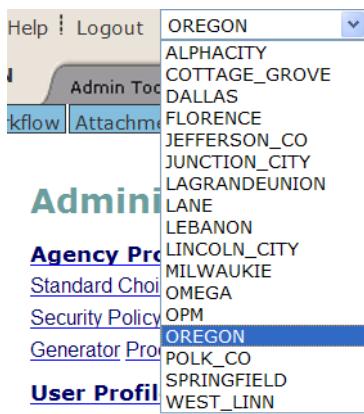
Allow Delegate User Login	Select this option to allow public user access to multi-agency information.
Delegate User ID	Use the picker icon to select the agency user account created for the public user group.
Operation Date	Use the drop-down list to specify the type of modification for this Delegate User. The Operation Type field lists these types of actions or operations: Create, Delete, or Update.
Operation Type	Use the drop-down list to specify the type of modification for this Delegate User. The Operation Type field lists these types of actions or operations: Create, Delete, or Update.
Operator	Use the picker icon to expand the list of agencies and their delegate users.
Super Agency	Select the agency to which you want public users to have the multiple agency access.
Parent User ID	Click the picker icon to search and select the delegate user's User ID at their primary agency.
Status	Select the delegate user status. Select Enable to activate or Disable to deactivate the delegate user account.

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 populates with the sub-agencies where they have delegate user access.

To switch between agency locations

1. To switch between agencies in Classic Administration, use the drop-down list in the upper toolbar of your console.
2. To switch between agencies in Civic Platform, use the drop-down list in the upper area of your page.



Multi-Agency Service Management

Manage the services offered by associating the services with a record type. You can also associate the service with a licensed professional type. For example, a licensed commercial contractor can 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 [Services Example Configurations](#).

Filter which services your agency offers by using the Service Lock Condition feature. This feature provides the option to exclude services to a particular address or licensed professional.

In order for complete feature functionality, you must consider these configuration considerations. The multi-agency services feature also applies to Citizen Access, which means the public user group must have an associated delegate user account to enable users to view the services offered from multiple agencies. See [Creating a Delegate Account for a Public User Group](#). If you want to provide public users with the ability to request services from multiple agencies, you must configure Civic Platform before you can create records that accommodate multi-agency functionality. This configuration requires matching service configurations such as Application-Specific Information Subgroups at the parent and sub-agency level. Refer to the “Creating Records” section of the *Citizen Access Administrator Guide*. An administrator must configure the sharing of information across all agencies providing services. Refer to [Delegate User Management](#).

Topics

- [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](#)

Adding a New Service

You can offer 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 [Delegate User Management](#). You can associate each service with a record type and with a Licensed Professional or Address Type. For examples, see [Services Example Configurations](#). These configurations determine which

services users view when logged into ACA. A pre-configured EMSE script determines which agency to use if 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 Management](#) for configuration information.

To learn more about associating a licensed professional type or address type, see [Associating License Types with a Service](#) and [Associating an Address Type with a Service](#).

To add a new service

1. Access the Service portlet ([Accessing the Service Portlet](#)).

2. Click **New**.

Civic Platform displays the Service portlet.

3. Complete the fields as described in [Service Field Descriptions](#).

4. Click **Save**.

5. Associate a Licensed professional as described in [Associating License Types with a Service](#).

6. Associate an Address Type as described in [Associating an Address Type with a Service](#).

7. Click **Save**.

Table 38: Service Field Descriptions

ASI Group	This field automatically populates based on the selected record type.
ASI Sub Group	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 you do not specify the ASI sub group, the service scope is identical to that of the record type.
Record Type	Click the picker icon to select the Record Type you want associated with this service.
Service	Enter the name of the Service.

Table 39: 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	-	Contractor	Address Type Group 1
Oregon	New Drain	Plumbing	Plumbing_services	New Drain_Info	Architect	Address Type Group 1 and Address Type Group 2

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. Access the Service portlet ([Accessing the Service Portlet](#)).
2. Click **Search**.

Civic Platform displays the Service Search portlet.

The screenshot shows the 'Administration' header bar. Below it is a 'Service' search interface with the following fields:

- Service:** A text input field.
- Record Type:** A dropdown menu.
- License Type:** A dropdown menu.
- Address Type:** A dropdown menu.

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 bar. Below it is a 'Service' details interface for a 'Building Permit' entry:

Service	Record Type	ASI Group	ASI Subgroup
Building Permit	Building/ACA/ACA/all section in one page	BOND	

Below the table is a 'Service: Building Permit' sub-header with buttons for Menu, Save, Reset, and Help. At the bottom is a form with fields for Service (Building Permit), Record Type (Building/ACA/ACA/all section in one page), ASI Group (BOND), and ASI Subgroup (dropdown menu).

5. Make your modifications. Refer to [Service Field Descriptions](#).

6. Click **Save**.

Associating License Types with a Service

You can associate a license type with a service, which provides a way for a user to view services and request services appropriate to their license type. For examples, refer to [Example Multi-Agency Services and Licensed Professional Type Associations](#).

You can use this feature with EMSE scripts for license validation. When you update licensed professional information in Civic Platform, you can verify the license at an external database by using a dynamic web

service. This feature also applies to a licensed professional registered with a public user account for Citizen Access. Validation of license information can occur at the time of login.

To associate a license type with a service

1. Access the Service portlet ([Accessing the Service Portlet](#)).
2. Search and select the service you want to work with.
Civic Platform displays the service details in the detail portlet.
3. Click the **License Type** tab.
Civic Platform displays the Licensed Professional Type list portlet.

Service	Record Type	ASI Group	ASI Subgroup
<input type="checkbox"/> Building Permit	Building/ACA/ACA/all section in one page	BOND	BOND

License Type

License Type
<input type="checkbox"/> ARCHITECT
<input type="checkbox"/> DEVELOPER

4. Click **Look Up**.
Civic Platform displays the License Type portlet.
5. Enter the Licensed Type Name and Description, or leave the fields empty.

License Type	Description
Contractor	

6. Click **Submit**.
Civic Platform displays the license types that meet your search criteria.

License Type	Description
CONTRACTOR	drop list...

7. Select the license types you want to associate with the service, and then click **Select**.
Civic Platform adds the license types to the License Type list portlet of the service.

Table 40: Example Multi-Agency Services and Licensed Professional Type Associations

Agency	Service Name	License Type
Oregon	Water Heating	Contractor
Oregon	Water Heating	Architect
Eugene	New Drain	Contractor

Agency	Service Name	License Type
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 feature provides a way for a user to view services and request services appropriate to their address. For examples, refer to [Example Services and Address Type Associations](#).

To associate an address type with a service

1. Access the Service portlet ([Accessing the Service Portlet](#)).
2. Search and select the service you want to work with.
Civic Platform displays the service details in the detail portlet.
3. Click the **Address Type** tab.
Civic Platform displays the Address Type list portlet.

The screenshot shows the Civic Platform interface. At the top, there's a blue header bar labeled "Administration". Below it, a "Service" portlet has "Address Type" selected. The main content area displays a table of services:

Service	Record Type	ASI Group
<input checked="" type="checkbox"/> service	Building/007/007/007	MAT
<input type="checkbox"/> 379	AMS/Parks/Maintenance/NA	MAT_TEST
<input type="checkbox"/> 952	Building/Fay/Fay/Workflow	GENERAL

Below the table, another section titled "Address Type" is visible, showing a "Look Up" button. At the bottom of the page, there are three tabs: "Service", "License Type (1)", and "Address Type (1)".

4. Click **Look Up**.
Civic Platform displays the Address Type list portlet.
5. Enter the Address Type Name and Description you want associated with the Service.
6. Click **Submit**.
Civic Platform returns you to the Address Type list portlet.

Table 41: 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 to lock out services from a particular agency at an address or licensed professional, but still offer services from other agencies.

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. Access the Professionals portlet ([Accessing the Professionals 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 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 **Service Name** field and select the condition to which you want to associate the service lock from the drop-down list.
6. Click **Submit**.

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. Access the Addresses portlet ([Accessing the Addresses, Parcels, or Owners Portlets](#)).
2. Search and select the address to which you want to associate a Service Lock condition.
Civic Platform displays the Address details in the detail portlet.
3. Click the **Conditions** record 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 **Service Name** field and select the condition to which you want to associate the service lock from the drop-down list.
6. Click **Submit**.

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 super agency to sub-agency. The administrator from the super agency is responsible for setting up the batch job for data synchronization. When you run the batch job and Civic Platform recognizes that the sub-agency does not have the Licensed Professional in the database, Civic Platform creates the Licensed Professional at the sub-agency with same License State, State License number, License Type as the one at the super agency.

For information about Batch jobs, refer to [Working with Batch Jobs](#).

To schedule a batch job that synchronizes licensed professional data between agencies

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New**.

The Job Detail tab displays.

The screenshot shows the Civic Platform administration interface with the 'Batch Jobs' portlet open. The 'Job Detail' tab is selected. The main area displays a table of existing batch jobs:

Name	Job Type	Service Category	Schedule Status	Job Status
Import fr...	System	Data Manager Import	On Hold	Complete
Global Se...	System	Global Search Rebuild Index	On Hold	
bob c test	System	Data Manager Export	On Hold	Complete

Below the table, a specific job is selected: 'Job Name: Import from Flagstaff'. The details for this job are shown in the 'Job Detail' section:

Name	Import from Flagstaff
Description	(empty text area)
Job Type	System
Service Category	Data Manager Import
Job Status	Complete

3. Complete the Job detail fields as described below.

Name	Provide a name for the new job.
Job Type	Choose System from the drop-down list.
Description	Provide a brief comment about the Job name.

4. Click **Submit**.

5. Schedule the Job by clicking the **Job Schedule** tab.

Civic Platform displays the Job Schedule portlet.

The screenshot shows the 'Job Detail' tab selected in the top navigation bar. Below it, there are several input fields: 'Frequency' set to 'Once', 'Start Date' and 'End Date' both empty, 'Schedule Status' set to 'On Hold', 'Start Time' set to '01 : 00 AM', 'Time Out (seconds)' empty, and a dropdown menu for 'PM Generate' currently showing '--Select--'.

- a. Complete the fields as described below:

Start Time, Start Date and End Date	Enter the time that you want the job to execute. This time should be a time at which the server is running and free to run the batch job. Select a start and end date too using the date picker icon.
Schedule Status	Choose one: To have the batch job run, select Active from the drop-down list. To disable the job from running on schedule, select On Hold.
Time Out (seconds)	Specify how long you want the server to wait (in seconds) if the batch job does not run as scheduled.
Frequency	Select how often to run the batch job from this drop-down list.

- b. Click **Save**.

Record Creation Across Agencies

In a multi-agency environment, your agency requires the implementation of Citizen Access to provide the record creation process across multiple agency services. When configured this way, Citizen Access provides a way for public users to manage records from multiple agencies all from a single login. This type of configuration is best used when a single Citizen Access site exists to service multiple agencies. An example of this type of configuration is when a state hosts a single Citizen Access site that provides access to all of the cities and counties within the state. You must perform multiple configurations for numerous features within Civic Platform and Citizen Access for complete functionality. This section provides the basic conceptual flow for the process to create a record, what you need to configure, and the impact of configurations on the user interface.

Impact on the User Interface

To use this feature, you must configure multi-agency services, the sub-agency record types, and the reports. 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 super agency level. The place holder record type does not require Custom Fields Group, Workflow, or Fee setup as, again, it merely functions as a container. 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. Doing so forces the public user to initially select the place holder record type so you can associate the record types for the sub-agency services with it moving the group of records together through the record creation process. The following section contains the configuration instructions for the record creation feature and its 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. You must 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 Management](#).
2. Configure the ability for multiple agencies to share information in a common database. Multi-agency sharing is particularly useful when you search for addresses across multiple agencies to select a work location. For complete configuration information, refer to [Delegate User Management](#).
3. Enter the Official website URL on the Global Settings page. For complete configuration information, refer to "Official Website" in the "Global Settings" section of the *Citizen Access Administrator Guide*.
4. Configure the multi-service functionality for multiple agencies, including:
 - a. Configure a record type at the super agency level. This record type does not require a Custom Fields group, Workflow, or Fee setup.
 - b. Configure any record types at the sub-agency level.
 - c. Configure Custom Fields for sub-agency services. For example, Custom Fields Groups "plumbing services" with the sub-group "water heater". For more examples, refer to [Table 39: Services Example Configurations](#).



Note:

You must define Custom Fields subgroups at both the parent and sub-agency level and they must be configured to match each other. At the parent level the Custom Fields subgroup information must exist in the database but you do not need to associate it with a record type.

- d. Set up the multi-agency services and associate them to record types, Licensed Professionals, Addresses. You must also configure the Service Locks. For basic configuration information refer to [Multi-Agency Service Management](#).
- e. Associate any Logos with an agency. For complete configuration information, refer to [Branding Civic Platform for Your Agency](#).
5. Receipt and Permit Summary configurations.
 - a. Configure the Receipt and Permit Summary in Report Manager. You must define receipts for each sub-agency and super agency. You must also define an overall multi-agency receipt that includes all sub-agency information at the super agency level. For complete configuration information, refer to "Setting up Permit Reports" in the *Citizen Access Administrator Guide*.
 - b. Associate the receipts and the Permit Summary to buttons in Citizen Access. For complete configuration information, refer to "Associating Reports with Print/View Buttons" in the "Reporting Information" chapter of the *Citizen Access Administrator Guide*.

6. Configure the page-flow for the super agency placeholder record type. For complete configuration information, refer to “Defining the Page Flows for Record Types” in the “Creating Records” chapter of the *Citizen Access Administrator Guide*.

Configure the record type filter to exclude all records but the super agency placeholder record type. For complete configuration information, refer to “Record Type Filters” in the *Citizen Access Administrator Guide*.

Sharing APO and Contacts Across Agencies

Civic Platform provides a way for multiple agencies to share address, parcel, owner, licensed professional, and contact information. When you consolidate APO, licensed professional information, and contact information, it allows users to perform searches or update information across agencies. Consolidating information also limits duplicate information in various agency databases. For complete information about how to consolidate licensed professionals, see [Synchronizing Licensed Professional Data between Agencies](#).

Topics

- [Sharing Addresses, Parcels, and Owners \(APO\)](#)
- [Sharing Contacts](#)

Sharing Addresses, Parcels, and Owners (APO)

To enable normal agency users to search and edit the information from other agencies without toggling between agencies, you must configure the agency option “APO Source Number” to an identical value for each agency that is sharing information. For instructions, see [To configure the agency option “APO Source Number” for information sharing](#).

For more information on configuring the agency options, see the “Agencies and Functions” chapter in the Civic Platform On-premise Administrator Supplement.

If the APO Source Number differs in the super-agency and sub-agency, a super-agency user can still search for and edit the sub-agency information, provided the sub-agency administrator creates a delegate user for the super-agency user.

For delegate users management, see [Delegate User Management](#).

To configure the agency option “APO Source Number” for information sharing

1. Access the Classic Administration page. ([Accessing Classic Administration](#).)

2. Choose **Agency Profile > Agency**.

Civic Platform displays the Agency—Search page.

Agency - Search

NOTE: This screen is reserved for Accela.com Professional Services staff only.

Input search parameters below to find an Agency to maintain.

or click **Add** to create a new Agency.

The screenshot shows the "Agency - Search" form. It contains the following fields:

- Agency Code:** Text input field
- Jurisdiction Name:** Text input field
- Agency:** Text input field
- Address:** Text input field
- AA Version:** Dropdown menu set to "All AA Version"
- City:** Text input field
- State:** Text input field
- Zip:** Text input field
- Status:** Radio buttons for "Enable" (selected), "Disable", and "All"

Below the form are two buttons:

- Submit** (dark blue button)
- or**
- Add** (dark blue button)
- New Agency** (link)

3. Enter the Agency Code of the agency for which you want to share the reference information with other agencies.

4. Click **Submit**.

Civic Platform displays the Agency-Browse page.

5. Click the red dot next to the agency you want to work with.

Civic Platform displays the Agency-Edit page and existing Agency Properties.

Agency - Edit

NOTE: This screen is reserved for Accela.com Professional Services staff only.

Use this form to update Agency information.

Agency Code: OREGON	Jurisdiction * : OREGON
Agency Num: 2085	Agency * : OREGON
Default Language * : English (US) <input type="button" value="▼"/>	
Multi-Language Support * : <input type="radio"/> Yes <input checked="" type="radio"/> No	
APO Source Number: 888	
ADDRESS1 * : 1535 EDGEWATER STREET NW	
ADDRESS2:	
CITY: SALEM State OR ZIP 518000	
Time Zone: Etc/GMT+8 GMT-08:00	
Special Handle:	
CONTACT_LINE1 * : Lori Graham	
CONTACT_LINE2:	
AA Version: 7.2.0	
Use Department Name: <input checked="" type="radio"/> Yes <input type="radio"/> No	
Customized Application Number: <input checked="" type="radio"/> Yes <input type="radio"/> No	
Customized Receipt Number: <input checked="" type="radio"/> Yes <input type="radio"/> No	
Customized Invoice Number: <input type="radio"/> Yes <input checked="" type="radio"/> No	
Customized Application Type Display Order: <input checked="" type="radio"/> Yes <input type="radio"/> No	
Inspection Scheduling; Activate Next Working Day btn: <input checked="" type="radio"/> Yes <input type="radio"/> No	
Address With Street/Unit End Number: <input type="radio"/> Yes <input checked="" type="radio"/> No	
Workflow Assign Task Date From Default Value: 30 (days) from Date To(today)	
Account Disable Time Frame: 90 (days)	
Password Timeout Time Frame: 90 (days)	
Password Change: <input checked="" type="radio"/> By User <input type="radio"/> By Administrator	
Ad Hoc Multiple Agency Report: <input type="radio"/> No <input checked="" type="radio"/> All <input type="radio"/> List List of Agencies: (in single quotes, separated by commas)	
List of Agency Source Sequence: (must be number, separated by commas)	
Find Application Date Range: 30 days from Date To(today) OR fixed Date <input type="text"/> <input type="button" value="Date"/>	
Inspection Results 4.0 Multiple Result Screen: <input type="radio"/> Yes <input checked="" type="radio"/> No	
EMSE Logging: <input type="radio"/> Yes <input checked="" type="radio"/> No	
PRINT PERMIT STYLE: <input checked="" type="radio"/> With Logo <input type="radio"/> Without Logo	
ISSUE PERMIT AFTER FEE PAID: <input checked="" type="radio"/> Yes <input type="radio"/> No	
EMAIL HYPERLINK: <input type="radio"/> Yes <input checked="" type="radio"/> No	
Recalculate Invoiced Fee: <input type="radio"/> Yes <input checked="" type="radio"/> No	
Commas in Numeric App and Task Specific Info Fields: <input checked="" type="radio"/> Yes <input type="radio"/> No	
TURN ON FEE AUDIT TRAIL: <input type="radio"/> Yes <input checked="" type="radio"/> No If Yes, please enter Account Code for Invoice Adjustment.	
Account Code 1: NA	
2: NA	
3: NA	
Enable Application Name: <input type="radio"/> Yes <input checked="" type="radio"/> No	

Enable Record Audit Log

Record/ASI/ASIT: Yes No
 Guide Sheet: Yes No
 Record Condition: Yes No
 Reference Condition: Yes No
 Standard Condition: Yes No
 Document: Yes No
 Examination: Yes No
 Asset: Yes No

Asset Management Solution Modules

AMS: Yes No
 ServicesCRCAMS: Yes No

Land Management Solution Modules

Airport: Yes No
 Boiler: Yes No
 Building: Yes No
 BuildingAlias: Yes No
 BuildingPermits: Yes No
 Building_1: Yes No
 Building_2: Yes No
 Building_County: Yes No
 Building_city: Yes No
 CTEST: Yes No
 CodeCompliance: Yes No
 Community_Dev: Yes No
 ERS: Yes No
 Elevator: Yes No
 Enforcement: Yes No
 Facilities: Yes No
 Fire: Yes No
 MiscServices: Yes No
 Permits: Yes No
 PlanReview: Yes No
 Planning: Yes No
 PublicWorks: Yes No
 Transportation: Yes No

License and Case Management Solution Modules

Licenses: Yes No

PublicHealth Solution Modules

Environmental: Yes No
 Health: Yes No

RealEstateAcq Solution Modules

Land: Yes No
 RealEstate: Yes No

Service Request Solution Modules

ServiceRequest: Yes No

Save **Cancel**

6. Set the **APO Source Number** to be the same as the other agency that you want to share information with. If you do not want an agency not to share the information this way, assign a unique **APO Source Number** value to it.
7. Repeat Steps 2 through 5 for each agency that you want to share information.

Sharing Contacts

In a multiple-agency environment, you can share contacts across agencies. When an agency user adds or updates a contact from the main agency or the sub-agency, Civic Platform 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, contact relationships, and contact association with public users.

You must associate contact templates with contact types. If agencies associate different contact templates for the same contact type, only the template fields with the same field labels synchronize 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 42: Example Contact Templates](#). When you add an applicant from Main Agency, 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 you add

an applicant from Sub-Agency 2, 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 42: 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 Choice configuration. Each agency must configure the Standard Choice CONTACT_ACROSS_AGENCIES in the same way to specify which agencies share contacts. For complete information on how to configure a Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

Viewing Information Across Agencies

A multi-agency environment provides users the ability to view information across agencies in the following Civic Platform features:

- Task dashboard
- Related records
- Record search
- Inspection search

Configuration

These configuration instructions listed below assume that you have already configured your multi-agency environment as described in this chapter. To enable users to view information across agencies:

- Configure all agencies in your multi-agency environment to use the new UI (these enhancements are not available in the legacy V360 user interface).
 - Set the **ENABLE_80_UI** standard choice value to YES in each agency. This adds the **Switch to new UI** link to the V360 console.
 - Users must select the **Switch to new UI** link in each agency comprising the multi-agency environment.
- To display your agency code on record IDs in the tree view of the Related Records page, configure the existing standard choice **RELATED_CAP_CONFIG** as follows:

Standard Choice Value	Value Description	Description
DISPLAY_CONFIG	\$SERV_PROV_CODE\$	Displays your agency code on record IDs in the tree view of the Related Records page in multi-agency environments.

- To enable users to search for records and inspections across multiple agencies, add the Agency field to your records search form and your inspections search form as described below.

- To enable users to search for records by status type across multiple agencies, add the Status Type field to your records search form and your inspections search form as described below.

To enable cross-agency records and inspections searches:

1. Click  to access the launchpad.
2. Navigate to the Records or Inspections page.
3. Click **Search**. The Records or Inspections Search page displays.
4. Add the Agency and Status Type fields to your records search page:

a. Click **Menu > Edit View**.

b. For complete instructions see [Working with Forms > Using the Edit View Feature](#).



Note: Cross-agency searches are only supported for record and inspection searches. However when FID 8403-Multi Agency Switch is enabled, cross-agency search fields (Agency and Status Type) may display in search forms where cross agency searches are not supported, and will only return results from a single agency (the agency you are currently logged in to).

Customizing Regional Settings

You can manage and accept data from people who live outside of the United States without turning on the Internationalization and Localization feature.

Before your agency issues professional licenses and receives applications from customers who:

- are not residents of the United States, or
- have completed education, continuing education, or examination outside the United States,

You must define regional settings for each foreign country or region. This way, both internal staff and external citizen users can enter, format, and store the zip code or postal code, country code, phone number, and fax number based on the selected country or region.

The regional settings for a country or region applies to Civic Platform and its add-ons such as Citizen Access and Mobile Office.

Click a topic title below for full details.

Related Information

[Defining Regional Settings for a Country or Region](#)

[Viewing or Editing Regional Settings for a Country or Region](#)

[Deleting Regional Settings for a Country or Region](#)

Defining Regional Settings for a Country or Region

Follow the steps below to define regional settings for a country or a region other than the United States. Do not define regional settings for the United States, because Civic Platform contains a pre-configured regional settings entry for the United States. See [Viewing Default Regional Settings for the United States](#) for more information.

To define regional settings for a country or region

1. Access the Regional Settings portlet ([Accessing the Regional Settings Portlet](#)).
2. Click **New**.
Civic Platform displays the regional settings form.
3. Complete the fields that display. For a list of field descriptions, see [Table 43: Regional Settings Fields](#).
4. Click **Save**.

Table 43: Regional Settings Fields

Country/Region	Use this drop down list to choose the country or region for which you want to define the regional settings. When you enable the Standard Choice COUNTRY, this drop-down list contains the values defined in the Standard Choice. When you disable the Standard Choice, this drop-down list contains all the countries and regions available in the Civic Platform database. However, to avoid any duplicate or conflict settings, this drop-down list always excludes the countries or regions for which you have already defined the regional settings. For more information about the Standard Choice COUNTRY, see its listing in the “Internationalization Standard Choices” section of the <i>Internationalization Installation and Administrator Guide</i> .
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Default Country/Region	Select this option if you want to set this country or region as the default. The country or the region displays as the default Country/Region in a drop-down list for users (for example, on the application intake form). You can only set one country or region as the default one for an agency. Another quick way to set a country or region as default is to select the country or region from the Regional Settings list portlet and then click Set Default.
State/Province	Use the drop-down list to decide the list of the states or provinces that comprise the country or region. The options available in this drop-down list are the Standard Choices of the Business Configuration - State/Province type. For example, this drop-down list might have two options: one is "US_State/Province," which defines a list of states for the United States; and the other is "AU_State/Province," which defines a list of states for Australia. So if you are defining regional settings for the United States, choose "US_State/Province" from this drop-down list. This way, when the user selects the United States in a form like the Contact Address intake form, the State drop-down list in that form contains the values you define in the Standard Choice US_State/Province. For more information about the Standard Choices of the State/Province type, see the listing "State/Province (User-defined Name)" in the Standard Choices Reference chapter of the <i>Accela Civic Platform Configuration Reference</i> . If you do not choose any option from this drop-down list to define the states available for a country or region, users must manually enter a state name or a province name for that country or region in various forms.
Use ZIP Code	Select this option if the country or region uses ZIP codes in addresses. If you leave this option blank, Civic Platform ignores the Required property defined for the ZIP Code (or Postal Code) field in the Form Portlet Designer and prevents users from filling in that field.
ZIP Code Mask	This field defines the mask for the ZIP Code (or Postal Code) field in all pages related to contact addresses and premise addresses across Civic Platform, Citizen Access, and Mobile Office. It is an active field only when you select Use ZIP Code . When users select a country from the Country/Region drop-down list, the specified mask automatically applies to the ZIP Code field. The mask ensures that users enter proper values in the expected format and position. You can use the following placeholder and literal characters to define a ZIP Code mask: A: Users must enter a letter. The letter automatically capitalizes. #: Users must enter a digit. (): Parentheses indicate optional fields. For example, if the ZIP Code mask is #####(-####), the last 4 digits of the ZIP Code are optional. Users can enter "94610" or "94610-6279" in the ZIP Code field. NOTE: Parentheses can only be used at the end of the mask. For example, the following masks do not work: (###) ###, ### (###) ###. Space or hyphen: Spaces and hyphens are formatting characters. They automatically populate in the field in the position that you specify. For example, a U.S. ZIP code might be 94596-2801, while a Canadian postal code might be M5T 2T9. The masks for these formats are: #####-#### and A#A #A#.
Phone Number Country Code	This field defines the country code for phone numbers and fax numbers. When users select a country from the Country/Region drop-down list, the pre-defined value automatically populates into the Country Code field.  Note: You must configure Standard Choice PHONE_NUMBER_IDD_ENABLE and set its value to Yes. Otherwise, the Country Code field is not available to users. For more information see the "Internationalization Standard Choices" section of the <i>Internationalization Installation and Administrator Guide</i> .

Phone Number Mask	<p>This field defines the mask for the Phone Number and Fax Number fields in all pages related to contact addresses and premise addresses across Civic Platform, Citizen Access, and Mobile Office. When users select a country from the Country/Region drop-down list, the specified mask automatically applies to the Phone Number and Fax Number fields. The mask ensures that users enter proper values in the expected format and position. You can use the following placeholder and literal characters to define a Phone Number mask:</p> <p>#: Users must enter a digit.</p> <p>(): Parentheses in the phone number mask differ from the ZIP code mask. These parentheses are formatting characters. They automatically populate in the field in the position that you specify. For example, you might always want telephone numbers formatted like so: (510) 813-9225. The mask for this format is (###) ###-####.</p> <p>Space or hyphen: Spaces and hyphens are formatting characters. They automatically populate in the field in the position that you specify.</p>
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Viewing or Editing Regional Settings for a Country or Region

To view or edit regional settings for a country or region

1. Access the Regional Settings portlet ([Accessing the Regional Settings Portlet](#)).
2. Select the country or region for which you want to view or update regional settings.
Civic Platform displays the regional settings form.
3. Update the fields that display, as appropriate for your agency. For a list of field descriptions, see [Table 43: Regional Settings Fields](#).
4. Click **Save**.

Viewing Default Regional Settings for the United States

When your agency first implements the latest version of Civic Platform or upgrades an existing instance to the latest version, Civic Platform automatically creates an entry for the United States in the Regional Settings portlet. That entry populates with the default settings for the United States. See [Table 44: Default Regional Settings for the United States](#). You can update the settings as appropriate for your agency.

Table 44: Default Regional Settings for the United States

Country/Region	United States
Default Country/Region	If you set the United States as the default country, and if you do not set a default country before upgrading Civic Platform, this option automatically enables.
State/Province	STATES
Use ZIP Code	Enabled
ZIP Code Mask	#####(-#####)
Phone Number Country Code	1 or 001, same as the phone number country code defined for the United States in the Standard Choice PHONE_NUMBER_IDD. If your agency does not enable or define that Standard Choice, this field uses the US phone number country code that the STANDARDDATA agency defines in the Standard Choice PHONE_NUMBER_IDD. For more information about the Standard Choice, see its listing in the “Internationalization Standard Choices” section of the <i>Internationalization Installation and Administrator Guide</i> .
Phone Number Mask	##-##-##

Deleting Regional Settings for a Country or Region

To delete regional settings for a country or region

1. Access the Regional Settings portlet ([Accessing the Regional Settings Portlet](#)).
2. Select the country or region for which you want to delete the regional settings.
3. Click **Delete**.

Configuring Global Search

Civic Platform provides a search engine to find information globally throughout the software. Users enter search criteria and Civic Platform displays results in a global search portlet grouped by information type.

The screenshot shows the Global Search interface with three main sections:

- Records:** Displays a table of records with columns: Number, Record Type, Short Notes, Location, Contact, Project Name, and Created Date. The table includes rows for various types of violations and permits.
- Locations:** Displays a list of locations with columns: Address, Parcel, and Owner. The list includes several addresses in Salem, OR.
- Assets:** Displays a table of assets with columns: Asset ID, Asset Type, Asset Group, Location, Status, and Last Updated. A single asset record for a street light is shown.

You can configure search to define how many max records return in a global search and how many result rows to display in a group results list page. For example, record result information is grouped together in pages and licensed professional result information is grouped together in pages. Within each group, a user can filter, page through, or sort through the result information.

The global search function works against indexed content in the Civic Platform database. To ensure the most accurate and up-to-date search results, configure a batch job to regularly index the Civic Platform database.

To configure global search:

1. Set the following FID(s) and Standard Choices (refer to the *Civic Platform Configuration Reference* for full details):
 - [8434-Global Search](#)
 - [GLOBAL_SEARCH_MAX_COUNT](#)
 - [BATCH_JOB_SERVICE_CATEGORY](#)
 - [GLOBAL_SEARCH_BUILD_INDEX_ENTITIES](#)
2. Create a Global Search Index Batch Job. See [Creating a Global Search Index Batch Job](#) for complete details.

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Batch Jobs

Job Type	Name	Job Status	Start Date	Start Time
Report	Daily Receipts	12/18/2015	01:00 AM	
Report	Report Automation		01:00 AM	
System	Test			
System	Accela_CRM_Integration	Complete		
Script	Create License Renewal Set	Complete		01:00 AM

Page 1 of 2 < >

New Execute Delete Help

Job Detail Job Schedule Log

Job Type * Name *

--Select--

Description

check spelling

E-mail

Create a new job

Accela Administr

Batch Jobs

Job Type	Name	Job Status	Start Date	Start Time	End Date	Frequency	Schedule Status
Report	Daily Receipts	12/18/2015	01:00 AM	12/18/2016	Daily	On Hold	
Report	Report Automation		01:00 AM		Once	On Hold	
System	Test				Once	On Hold	
System	Accela_CRM_Integration	Complete			Once	On Hold	
Script	Create License Renewal Set	Complete		01:00 AM	Daily	On Hold	

Page 1 of 2 < >

Menu Search New Execute Delete Help

Job Detail Job Schedule Log

Job Type * Name *

System Global Search Rebuild Index

Description

check spelling

E-mail

--Select--

- ✓ Global Search Rebuild Index
- Recurring Related Inspection
- Send Hearing Notice Email

If you have added this value to the Standard Choice "BATCH_JOB_SERVICE_CATEGORY" then this value will appear in this drop down menu

Part 3: Configuring Agency Business Objects

Civic Platform provides functions to configure agency business objects.

Related Information

[Creating and Configuring Records](#)

[Creating Custom Fields](#)

[Designing Application Intake Forms](#)

[Setting Up Security Policies](#)

[Defining Sequences, Masks, and Autonumbering](#)

[Designing Workflows](#)

[Using Expression Builder](#)

[Configuring Standard Comments](#)

[Setting Up Conditions](#)

[Configuring Record-Related Activities](#)

[Configuring Global Search](#)

Creating and Configuring Records

Records are the cornerstone of the system, consisting of a broad range of forms that users create and manage within Civic Platform, including applications, cases, licenses, permits, service requests, and work orders. Records provide a means of collecting the data that Civic Platform stores in its back-end database, enabling users to access the data and process it to achieve your agency's business objectives.

Click a topic title below for full details.

Related Information

- [Accessing Record Type Administration](#)
- [Creating New Record Types](#)
- [Working with Record Types](#)
- [Working with Address Type Groups](#)
- [Working with Application Status Groups](#)
- [Working with Intake Form Configuration Groups](#)
- [Working with Virtual Folder Groups](#)
- [Associating Record Types](#)
- [Setting Default Clone Options](#)
- [Managing Documents for Attachments](#)

Accessing Record Type Administration

You can access Record Type Administration portlets by selecting the Civic Platform Admin option from the Administration Setup portlet.

To access Record Type administration

1. Access the Record Type Administration portlet ([Accessing Record Type Administration](#)).

Creating New Record Types

This section provides instructions for creating a new record type, which involves three basic configuration tasks:

- To begin, click Create New Record and enter basic record type information. You can access additional record type configurations with the tabs on the record type summary navigation panel.
- Use the Settings portlet to configure additional record type features for add-ons, like Citizen Access and legacy Accela GIS.
- Use the Other Associations portlet to configure other related items for the record type, such as fee schedule, expiration code, application specific information, and workflows. The Other Associations portlet is also where you can configure the ability for agency users to submit partially completed applications.

You can save and resume as you go, but you must review all three areas of configuration to ensure you properly configure the record type. Additional administrator configurations that you can apply to record types include Standard Comments and Conditions. Refer to [Configuring Standard Comments](#) and [Setting Up Conditions](#).

Topics

- [Specifying Basic Record Type Information](#)
- [Configuring Record Type Settings](#)
- [Configuring Other Associations](#)

Specifying Basic Record Type Information

You must complete the required fields that display in the new record type page. This basic information allows the user to save enough critical data elements in Civic Platform so you can access the information about additional configuration or modification later.

To create a new Record type

1. Access the Record Type Administration portlet ([Accessing Record Type Administration](#)).
2. Locate the module that you want to add a record type and then Click **New Record Type**.

Record Type Alias	Record Type Name	Fee Schedule	Workflow	SmartChoice	ASI Group	Action
Building/ACA/Ams	Building/ACA/Amy/A AMY_FEE	BLDG_WM	46381	AMY/TEST	BALINTASI	Action
Building/ACA/Ams	Building/ACA/Amy/A AMY_NOFEE	720FP4	AMY/TEST	BALINTASI	Action	
Building/ACA/Am	Building/ACA/Amy/A AMY_FEE	720FP4	AMY/TEST	BALINTASI	Action	
Building/ACA/IAN	Building/ACA/IAN/test	720FP4	NONE		Action	
Building/ACA/JAN	Building/ACA/JAN/test	720FP4	46381		Action	
Building/ACA/carl	Building/ACA/carol CAROL	CAROL	AA SAC BASIC1	JAMES	Action	
Building/ACA/carl	Building/ACA/carol CAROL	CAROL	CAROL RENEW	720FP4	Action	
Building/ACA/elen	Building/ACA/elen/test AA_NOCHRG	AA SAMPLE	AA SAC BASIC1		Action	
check	Building/ACA/lizzie/test	720FP4	46381		Action	
Building/ACA/lizz	Building/ACA/lizzie/AMYTEST	AA SAMPLE	LIZZIE SINGLE CC PEGGY-ASI		Action	
Building/ACA/lizz	Building/ACA/lizzie/AMYTEST	AA SAMPLE	LIZZIE KAY_ASI		Action	
Building/ACA/lizz	Building/ACA/lizzie/AMYTEST	AA SAMPLE	LIZZIE SINGLE CC PEGGY-ASI		Action	
Building/ACA/vera	Building/ACA/vera/test AA_NOCHRG	720FP4	VERA	VERA	Action	
Building/ALM/ALM	Building/ALM/ALM/TST_EDU	AA SAMPLE	CE SMARTCHOIC	ASI GROUP 1	Action	
Building/ALM/ALM	Building/ALM/ALM/AA_NOCHRG	AA SAMPLE	CE SMARTCHOIC	ASI GROUP 1	Action	

Civic Platform displays the New Record Type page.

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 Alias:	<input type="text"/>
Group*:	<input type="button" value="Select a Group"/>
Type*:	<input type="button" value="Select a type or enter a new one"/>
Sub-Type*:	<input type="button" value="Select a sub-type or enter a new one"/>
Category*:	<input type="text" value="Enter a new one for this category"/>

Additional Settings

Select the common elements that apply to this new record type. If you need to create a new element, save your record type and navigate to the appropriate configuration page. You will be given an opportunity to assign or change these after you create the initial record type.

Fee Schedule:	<input type="button" value="Select a fee schedule"/>
Workflow:	<input type="button" value="Select a workflow"/>
SmartChoice Group:	<input type="button" value="Select a SmartChoice group"/>
Record Key Mask:	<input type="text" value="Default"/>
Partial ID Mask:	<input type="text" value="Default"/>
Temporary ID Mask:	<input type="text" value="Default"/>

3. Enter information in the fields as described in [Table 45: New Record Type Form Fields](#).

At a minimum, you must complete the Record Type Alias, Group, Type, Sub-Type, and Category. When those are complete, you can save and resume later.

4. Click **Save or **Save and Create Another**.**

Table 45: New Record Type Form Fields

Category	Enter the name of the new category.
Fee Schedule	Use the drop-down list to search and select a fee schedule to assign to the record type.
Group	Select a group for the record type.
Partial ID Mask	Use the drop-down list to search for a Partial ID Mask to identify records that users partially completed at intake, that represent an estimate, or that a user saved and resumed processing later in Citizen Access.
Record Key Mask	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 use the default value: \$\$yy\$ \$CAP-00000-\$SEQ05\$\$ by choosing Default from the list.
Record Type Alias	Enter an alias name for the record type. Record type aliases display in the Records list portlet. A record type alias is a short, logical name that represents the four-level name structure for the record type. For example, instead of displaying the record type Licenses/Business License/Retailer/Hairdresser, you can configure a record type alias that displays simply "Hairdresser." If you do not see the option to specify a Record Type alias, you might need to enable the functionality. To enable record type aliases, set the Standard Choice ENABLE_CAP_TYPE_ALIAS. Refer to the Civic Platform Configuration Reference for more details.
Intake Form Configuration Group	Use the drop-down list to search and select an Intake Form Configuration Group. Intake Form Configuration Group is an important step as it indicates what intake information Civic Platform gathers for this record type.
Sub-Type	Do one of the following: choose an existing or create a new sub-type. To create a new sub-type, enter a name in the field for it. To choose an existing sub-type, use the drop-down list to search and select the sub-type you want to use.
Temporary ID Mask	Use the drop-down list to search and select the mask used for the Partial ID Mask for this record type.
Type	Do one of the following: choose an existing or create a new type. To create a new type, enter a name in the field for it. To choose an existing type, use the drop-down list to search and select the type you want to use.
Workflow	Use the drop-down list to search and select a workflow process to assign to the record type.

Configuring Record Type Settings

After you define the basic configuration for a record type, you can complete the record type settings. These configurations include: settings for Citizen Access, Audit Frequency, and GIS Settings. For an overview of the Record Type Settings page, see [Configuring Other Associations](#).

To configure the Settings portlet

1. Access the Record Type Administration portlet ([Accessing Record Type 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](#).
Civic Platform displays the Record Type Summary page.
3. Click the **Settings** tab from the summary panel.
Civic Platform displays the Settings portlet.

Settings

Record Type Name:

IVR Number: Enter IVR Number Copy all associated APO

Status: Enable Disable
 Searchable
 As Child Only

Duration: (days)

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 :

Document Code : Select a Document Code

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*:

Enable Associated Forms
 Enable Partial Submission
 Searchable in Accela Citizen Access

Audit Frequency

Instructions : 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
Building	
Help Desk	
Ticket	
NA	

GIS Settings

Instructions : Select the default GIS Service and Edit Layer to be used for the record type.

GIS Service: Select a GIS Service

Edit Layer: Select Edit Layer

4. Complete the Settings fields as described in [Table 46: Record Type Settings Field Descriptions](#).
 - Complete the Settings for Citizen Access section, as appropriate for your agency.
 - Complete the Audit Frequency section, as appropriate for your agency.
 - Complete the GIS Settings fields section, as appropriate for your agency.
5. Click **Save**.

Table 46: Record Type Settings Field Descriptions

Section on Page	Field	Field Description
Settings for any module	Copy all associated APO	Select the option to copy all associated APO information about this record type application.

Section on Page	Field	Field Description
Settings for any module	Duration	Enter the number of days you estimate the record should take to complete.
Settings for any module	Icon	Click Browse to search and select the image you want associated with the record type.
Settings for any module	IVR Number	For each record type you want to assign, enter a unique numerical value in this field. This field is not for a phone number. Assign a unique number to each record type to make it faster and easier for public users to navigate the IVR call flow. When a caller receives a prompt to enter the record type, the caller enters the pre-assigned numerical value entered in this IVR Number field. For more information on how to set this up with IVR, see the <i>Accela Civic Platform IVR Installation Guide</i> .
Settings for any module	Status	Select Enable or Disable . 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 select the Searchable option, to enable users to search records with the disabled yet searchable record type.
Settings for any module	As Child Only	Enable this option for a record type to prevent users from selecting the record type for a stand-alone record.
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 you want to use to generate the estimated cost for each work order. Asset Module settings are particularly useful so that Accela Civic Platform - Asset users can record the estimated cost per production unit.
Settings for Asset Module	Unit of Production	Select the unit of measure for Production Units for the record type for Accela Civic Platform - Asset. For example, Each, Feet, Acres, or Miles.
Settings for Asset Module	Value Required to Close	Select the option to indicate users must enter a value in the Production Quantity field before they can close a work order in Accela Civic Platform - Asset.
Settings for Enforcement Module	Email for Hearing Notification	Enter the email address used to send email notifications for hearings.
Settings for Enforcement Module	Enforcement Type	Enter the enforcement type in this field. For example, Abatement.

Section on Page	Field	Field Description
Settings for Citizen Access	Enable Associated Forms	Select this option to display the Associated Forms step to the record creation process. Use Associated Forms to display and manage child records for the parent record during parent record creation. For more information about creating parent and child records, see the topic “Parent-Child Record Creation” in the Citizen Access Administrator Guide. Selecting this option also activates the Enable Partial Submission option. Enable Partial Submission: Select this option to enable public users to continue the application intake process without completing all available associated forms.
Settings for Citizen Access	Enable for Application	<p>Select Enable Application to make the Record type available in Citizen Access. When you only select the Enable Application option, the Record Type is available in Citizen Access, but you cannot automatically issue it through ACA. The agency must approve it.</p> <p>This option also flags Civic Platform to display the Record Type alias in Citizen Access. Also Enable Issuance: Select this option if you want to automatically approve and issue the record type through Citizen Access after a public user pays the fees in full.</p>
Settings for Citizen Access	Enable Fee Estimation	Select this option if you want to allow users to create a partial application that includes a calculation of estimated fees. Civic Platform bases this fee estimation on the Fee Schedule.
Settings for Citizen Access	Enable Renewal	<p>Select the Enable Renewal option if you want to enable the renewal of licenses in Citizen Access for this record type. Select this option to activate the Enable Issuance option for this renewal, and the Renewal Record Type drop-down list. You must then define a renewal record type to associate with this renewal process.</p> <p>Enable Issuance: Select this option for renewals if you want to provide issuance online, and enable the License or Permits status change back to active when the Citizen Access public user completes the Renewal Application.</p> <p>Choose a Renewal Record Type 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	Indicate the document code set for the types of documents public users can upload and attach to record types in ACA.

Section on Page	Field	Field Description
Settings for Citizen Access	Page Flow Code	Use this drop-down list to associate a Page Flow code to this record type. The page flow code you choose displays within Citizen Access Admin. You create and assign the default setting for this field in Citizen Access Admin page flow configuration. For more information, see “Configuring the Page Flows for a Module” in the “Creating Records” section of the <i>Citizen Access Administrator Guide</i> .
Settings for Citizen Access	Searchable in Citizen Access	Civic Platform enables this option by default, which means that the type of application is searchable in Citizen Access. You can clear this option to make the applications unsearchable.
Settings for Citizen Access	Set the criteria for selecting fees	To set the fee valuation associated with the record, you can choose between the higher value or the lower value of the Contractor Value and the Valuation Calculator.
Settings for Citizen Access	Do you want this permit to be available through Citizen Access	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 Civic Platform from selecting Building Permit Records for 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.</p> <p>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>
GIS Settings	Edit Layer	If your agency uses the legacy Accela GIS, use this field to limit users to a particular map edit layer when using this application category. For example, if the application category is for sewer lines, you can limit users to editing only a sewer map layer rather than all the edit layers. After you select the GIS Service, use this drop-down list to select the edit layer.
GIS Settings	GIS Service	If your agency uses the legacy Accela GIS, use this field to limit users to a particular map edit layer when using this application category. For example, if the application category is for sewer lines, you can limit users to editing only a sewer map layer rather than all the edit layers. Select the GIS Service that contains the map edit layer you want to use.

Configuring Other Associations

After you define the basic configuration and the settings for a record type, you can configure the Other Associations settings. These configurations include:

Address Type Group, Application Specific Info Group, Associated Record Types, Document Code, Expiration Code, Fee Schedule, Inspection Group, Sequences and Masks, Intake Form Configuration Group, Status Group, and Workflow.

You might have already defined some of these in the basic record type setup, but you can modify them if you have permission. 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.

The Other Associations portlet is also where you can configure the ability for agency users to submit partially completed applications.

To configure the other associations portlet

1. Access the Record Type Administration portlet ([Accessing Record Type 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](#).
- 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 and a 'View mask definition' link.
- Document Code:** Includes fields for Default Document Code (dropdown menu) and Default Document Type (dropdown menu). It also includes links for 'Select a Document Code', 'View/Edit', and 'Create new Document Code'.
- Expiration Code:** Includes a dropdown menu set to 'NONE' and links for 'View/Edit' and 'Create new Expiration Code'.
- Inspection Group:** Includes a dropdown menu for 'Select an existing Inspection Gr' and links for 'View/Edit' and 'Create new Inspection Group'.

4. Complete the Other Association fields as described in [Table 47: Record Type Other Associations Fields](#).

Table 47: Record Type Other Associations Fields

Section on Page	Field	Field Descriptions
Sequences and Masks	ID Mask	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 Sequence Mask Definition page you can also click Guide to review the recommended mask patterns and the examples. For information on sequences and masks, see Defining Sequences, Masks, and Autonumbering .
Sequences and Masks	Invoice Number Scheme	From the drop-down list, choose the invoice number format for the record type. You format an invoice number scheme by creating a mask. For an example on formatting a receipt number scheme or mask, see Defining Sequences, Masks, and Autonumbering . 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 can number invoices for the code enforcement department differently from invoices for the permit department.
Sequences and Masks	Partial ID Mask	Use the drop-down list to search for Partial ID Mask to identify records that a user only partially completed at intake, that represent an estimate, or that a user saved and resumed processing later in Citizen Access. Partial ID Mask is a required field.
Sequences and Masks	Receipt Number Scheme	From the drop-down list, choose the receipt number format for the record type. You format a receipt number scheme by creating a mask. For an example on formatting a receipt number scheme or mask, see Defining Sequences, Masks, and Autonumbering . Users can click the Receipt Number Definition link to read the pattern and definition of the receipt in this drop-down list. For example, administrators can group receipts for the building department differently from receipts for the code enforcement department.
Sequences and Masks	Record Key Mask	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 use the default value: \$\$yy\$\$CAP-00000-\$SEQ05\$\$ by choosing Default from the list. Record Key Mask is a required field.
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 complete instructions on how to create a document code, see Managing Documents for Attachments . Use the Default Document Type to provide a label for type of document, such as a graphic image or photo, diagram, or Word document.

Section on Page	Field	Field Descriptions
Expiration Code	Expiration Code	<p>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.</p> <p>For complete instructions on how to create an expiration code, see License Renewal.</p>
Inspection Group	Inspection Group	<p>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 Create New Inspection Group.</p> <p>For instructions on creating a new inspection code, see Inspections.</p>
Address Type Group	Address Type Group	<p>Use the drop-down menu to select an Address Type Group you want to assign to the record type.</p> <p>For more information, see Working with Address Type Groups.</p>
Status Group	Application Status Group Code	<p>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 Create New Status Group.</p> <p>For more information, see Working with Application Status Groups.</p>
Status Group	Default Record Status	<p>Use the drop-down menu to select the default record status you want to assign to the record type.</p> <p>For more information, see Working with Application Status Groups.</p>
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 Create New Fee Schedule. Fee Schedule is a required field.</p> <p>For more information about fee schedules, see the Understanding Fee Items.</p>
Workflow	Workflow	<p>Use the drop-down menu to select an existing Workflow. You can view or edit the Workflow by clicking the View/Edit link. If you want to create a new Workflow, click Create New Workflow. Workflow is a required field.</p>
Workflow	Enforce Validation Prior to Workflow Update	<p>With this setting, when an agency user creates an application, but does not have all the necessary information to enter data in all of the required fields, the user can submit the application and defer validation of the application until all the required information is available.</p> <p>When a user submits an application without validation, Civic Platform sets a Pending Validation flag on the newly created record. Civic Platform also creates a flag, Generated by Cloning, which defaults to No.</p>

Section on Page	Field	Field Descriptions
Intake Form Configuration Group	Intake Form Configuration Group	Use the drop-down menu to select an existing Intake Form Configuration Group. You can view or edit the Intake Form Configuration Group code by clicking the View/Edit link. If you want to create a new Intake Form Configuration Group, click Create New Intake Form Configuration Group. Intake Form Configuration Group is a required field. For more information about Intake Form Configuration Groups, see Working with Intake Form Configuration Groups .
Application Specific Info Group	Application Specific Info Group	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 Create New Application Specific Info. For more information about Application Specific Info Groups, see Creating Custom Fields .
Virtual Folder Group	Virtual Folder Group	Use the drop-down menu to select an existing Virtual Folder Group. You can view or edit the settings for the displayed Virtual Folder group by clicking the View/Edit link. If you want to create a new Virtual Folder Group, click Create New Virtual Folder Group. For more information about Virtual Folder Groups, see Working with Virtual Folder Groups .
Associated Record Types	No Status Status Group	Click the No Status link or click a status group link to prompt users to associate a record type. For more information about Status Group, see Working with Application Status Groups .

5. Click **Save**.

Enabling Submittal of Partially Completed Applications

You can enable agency users to submit partially completed applications, creating records that contain fully functional record detail tabs. The primary mechanism that enables this functionality is a setting in the Other Associations portlet, Enforce Validation Prior to Workflow Update, where you specify which workflow task triggers the validation of an application.

Civic Platform flags partially completed applications with a Pending Validation flag to easily distinguish them from validated applications when specifying records for EMSE handling and scripting, and when searching and filtering records. For example, you might want to write a script or conduct a search only for fully validated records.

A typical use case for this feature is when a paper application comes into the back office and is incomplete or does not yet contain information or documentation for all of the required fields. The agency still needs to enter the application into Civic Platform to enable payment processing, generate deficiency letters, and for other relevant activities.

To enable agency users to submit partially completed applications

- Access the Record Type Administration portlet ([Accessing Record Type Administration](#)).
Civic Platform displays the Record Type Administration portlet.



- Open the record type for which you want to enable agency users to submit partially completed applications. In this example, we are using a Waste Site Permit application.
- Civic Platform displays the record type.

The screenshot shows the 'Viewing Record Type' page for 'Waste Site Permit'. The 'Summary' tab is selected. It displays the following details:

- Group:** Licenses
- Type:** Business License
- Sub-Type:** Hazardous Waste Management
- Category:** Waste Site Permit
- Status:** Enabled
- Last Updated:** Mar 17 2014 02:47

The 'Navigation Panel' on the left includes links for 'Summary', 'Settings', and 'Other Associations', with 'Other Associations' being the active link.

- Click Other Associations.
- Civic Platform displays the record type associations that you can modify.

Waste Site Permit

Group : Licenses
Type : Business License
Sub-Type : Hazardous Waste Manag
Category : Waste Site Permit

Enabled for Accela Automation
Enabled for Accela Citizen Access

Last Updated Mar 17 2014 02:47

Summary

Settings

Other Associations

Fee Schedule

Instructions : Select the default fee schedule available for click the button to add a new schedule.

LICENSE * [ViewEdit](#) or

Workflow

Instructions : Select the workflow to define the processes for the button to add a new workflow.

WASTE SITE PERMIT - NEW * [ViewEdit](#) or

Enforce Validation Prior to Workflow Update [ViewEdit](#)

SmartChoice Group

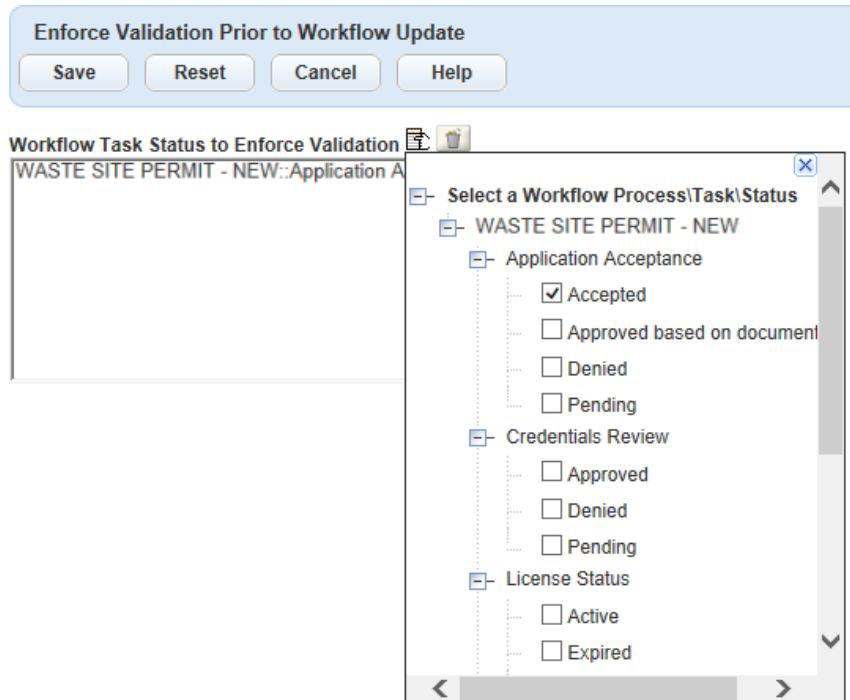
4. Scroll to the Workflow section, and in the Enforce Validation Prior to Workflow Update area, click View/Edit.

Civic Platform displays the Workflow Task Status to Enforce Validation screen.

Workflow Task Status to Enforce Validation		
WASTE SITE PERMIT - NEW	::Application Acceptance	::Accepted

5. Click the selection icon.

Civic Platform displays a navigation tree.



6. Use the navigation tree to select the workflow task and status that enforces application validation. For example, the Application Acceptance task, Accepted status. By deferring validation until the application reaches its Accepted status, agency staff can conduct business on the application without delay.

Working with Record Types

You can perform various tasks within the record type lists of a module. This section describes those tasks including searching, filtering, and enabling record types. This section also provides instructions on how to access online help.

Topics

- [Searching for Record Types](#)
- [Filtering a Record Type List](#)
- [Enabling or Disabling Record Types](#)
- [Accessing Online Help for Record Types](#)

Searching for Record Types

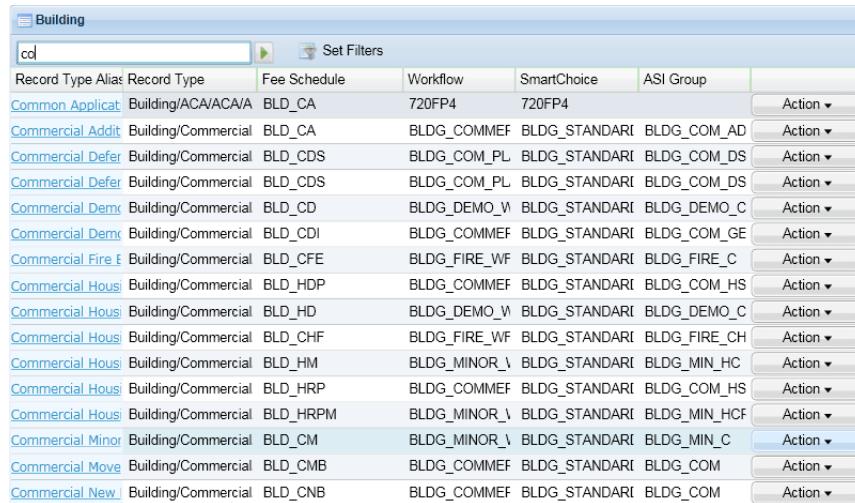
You can search for a record type by name. The record type search for each module returns results instantly when you enter any partial search criteria into the search window. For example, if you start typing a word that begins with the letter Co, Civic Platform returns all record types with a name beginning with Co.

To search for a record type

1. Access the Record Type Administration portlet ([Accessing Record Type Administration](#)).
2. Expand the module to reveal the associated record types.

3. Civic Platform supports quick search for record type aliases. Begin typing your search criteria in the search window. For example, Co.

Civic Platform returns a list of record types meeting the search criteria.



The screenshot shows a table titled "Building" with columns: Record Type Alias, Record Type, Fee Schedule, Workflow, SmartChoice, and ASI Group. A search bar at the top left contains "cd". The table lists various record types such as Common Applicat, Commercial Addit, Commercial Defei, Commercial Defei, Commercial Demo, Commercial Demo, Commercial Fire, Commercial Hous, Commercial Minor, Commercial Move, and Commercial New. Each row includes an "Action" button.

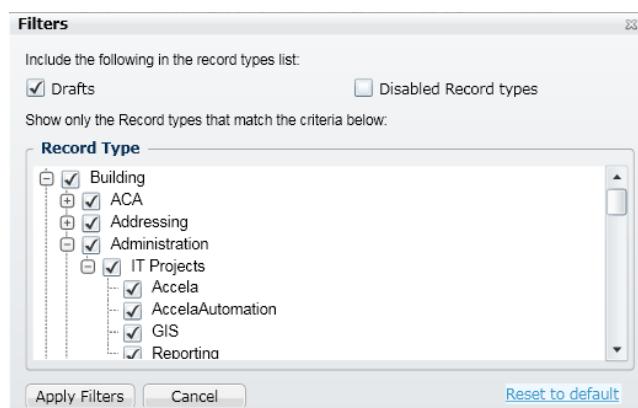
Record Type Alias	Record Type	Fee Schedule	Workflow	SmartChoice	ASI Group	Action
Common Applicat	Building/ACA/ACA/A	BLD_CA	720FP4	720FP4		Action ▾
Commercial Addit	Building/Commercial	BLD_CA	BLDG_COMMEF	BLDG_STANDARI	BLDG_COM_AD	Action ▾
Commercial Defei	Building/Commercial	BLD_CDS	BLDG_COM_PL	BLDG_STANDARI	BLDG_COM_DS	Action ▾
Commercial Defei	Building/Commercial	BLD_CDS	BLDG_COM_PL	BLDG_STANDARI	BLDG_COM_DS	Action ▾
Commercial Demo	Building/Commercial	BLD_CD	BLDG_DEMO_V	BLDG_STANDARI	BLDG_DEMO_C	Action ▾
Commercial Demo	Building/Commercial	BLD_CDI	BLDG_COMMEF	BLDG_STANDARI	BLDG_COM_GE	Action ▾
Commercial Fire	Building/Commercial	BLD_CFE	BLDG_FIRE_WF	BLDG_STANDARI	BLDG_FIRE_C	Action ▾
Commercial Hous	Building/Commercial	BLD_HDP	BLDG_COMMEF	BLDG_STANDARI	BLDG_COM_HS	Action ▾
Commercial Hous	Building/Commercial	BLD_HD	BLDG_DEMO_V	BLDG_STANDARI	BLDG_DEMO_C	Action ▾
Commercial Hous	Building/Commercial	BLD_CHF	BLDG_FIRE_WF	BLDG_STANDARI	BLDG_FIRE_CH	Action ▾
Commercial Hous	Building/Commercial	BLD_HM	BLDG_MINOR_V	BLDG_STANDARI	BLDG_MIN_HC	Action ▾
Commercial Hous	Building/Commercial	BLD_HRP	BLDG_COMMEF	BLDG_STANDARI	BLDG_COM_HS	Action ▾
Commercial Hous	Building/Commercial	BLD_HRPM	BLDG_MINOR_V	BLDG_STANDARI	BLDG_MIN_HCF	Action ▾
Commercial Minor	Building/Commercial	BLD_CM	BLDG_MINOR_V	BLDG_STANDARI	BLDG_MIN_C	Action ▾
Commercial Move	Building/Commercial	BLD_CMB	BLDG_COMMEF	BLDG_STANDARI	BLDG_COM	Action ▾
Commercial New	Building/Commercial	BLD_CNB	BLDG_COMMEF	BLDG_STANDARI	BLDG_COM	Action ▾

Filtering a Record Type List

You can filter record types to easily view record types on the Record Type Administration portlet.

To filter the record types list

1. Access the Record Type Administration portlet ([Accessing Record Type Administration](#)).
 2. Expand any module to reveal the associated record types.
 3. Click **Set Filters**.
- Civic Platform displays the filtering options
4. Expand the navigation tree to expose record types for each module.
 5. Select which record types you want to display.



6. Click **Apply Filters**.

Civic Platform filters the record types based on the filter settings.

Enabling or Disabling Record Types

A record type that requires you to enable it for a module displays an Action button. Click the Action button in the row of the record type to display the available options.

To enable a record type

1. Access the Record Type Administration portlet ([Accessing Record Type Administration](#)).
2. Expand the module to display the associated record types.
3. Locate the record type you want to enable or disable.
4. Click the **Action** button and choose one of the following:

Building					
Record Type Alias	Record Type	Fee Schedule	Workflow	SmartChoice	ASI Group
Common_Applicat	Building/ACA/ACA/A	BLD_CA	720FP4	720FP4	Action ▾
Commercial_Addit	Building/Commercial	BLD_CA	BLDG_COMMER	BLDG_STANDAR	BLDG_COM_AD
Commercial_Defer	Building/Commercial	BLD_CDS	BLDG_COM_PL	BLDG_STANDAR	BLDG_COM_DS
Commercial_Defer	Building/Commercial	BLD_CDS	BLDG_COM_PL	BLDG_STANDAR	BLDG_COM_DS
Commercial_Demo	Building/Commercial	BLD_CD	BLDG_DEMO_V	BLDG_STANDAR	BLDG_DEMO_C
Commercial_Demo	Building/Commercial	BLD_CDI	BLDG_COMMER	BLDG_STANDAR	BLDG_COM_GE
Commercial_Fire_E	Building/Commercial	BLD_CFE	BLDG_FIRE_WF	BLDG_STANDAR	BLDG_FIRE_C
Commercial_Hous	Building/Commercial	BLD_HDP	BLDG_COMMER	BLDG_STANDAR	BLDG_COM_HS
Commercial_Hous	Building/Commercial	BLD_HD	BLDG_DEMO_V	BLDG_STANDAR	BLDG_DEMO_C
Commercial_Hous	Building/Commercial	BLD_CHF	BLDG_FIRE_WF	BLDG_STANDAR	BLDG_FIRE_CH
Commercial_Hous	Building/Commercial	BLD_HM	BLDG_MINOR_V	BLDG_STANDAR	BLDG_MIN_HC
Commercial_Hous	Building/Commercial	BLD_HRP	BLDG_COMMER	BLDG_STANDAR	BLDG_COM_HS
Commercial_Hous	Building/Commercial	BLD_HRPM	BLDG_MINOR_V	BLDG_STANDAR	BLDG_MIN_HCF
Commercial_Minor	Building/Commercial	BLD_CM	BLDG_MINOR_V	BLDG_STANDAR	BLDG_MIN_C
Commercial_Move	Building/Commercial	BLD_CMB	BLDG_COMMER	BLDG_STANDAR	BLDG_COM
Commercial_New	Building/Commercial	BLD_CNB	BLDG_COMMER	BLDG_STANDAR	BLDG_COM

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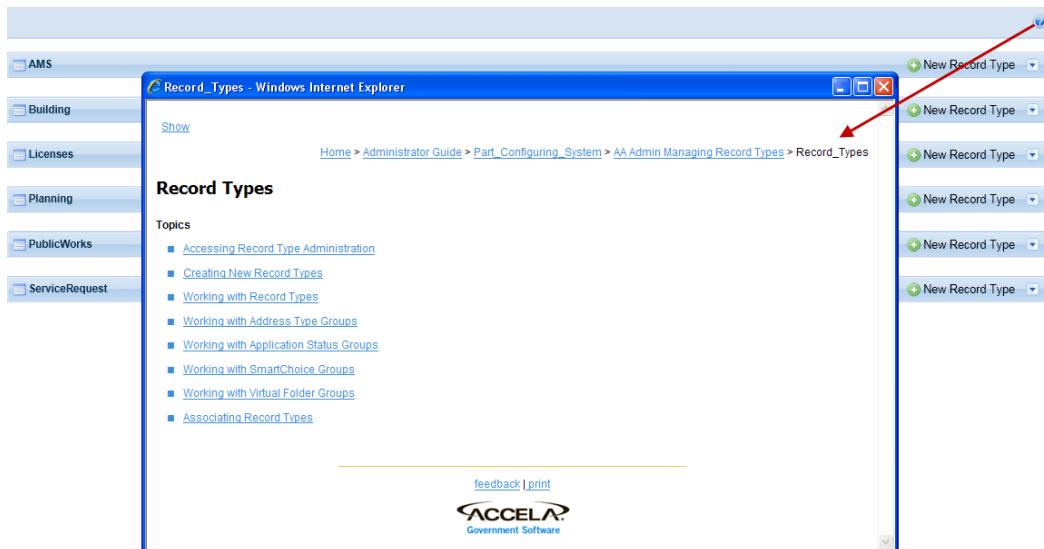
- Choose **Enable** from the drop-down list to enable the record type in the module.
 - Choose **Disable** from the drop-down list to disable the record type from the module.
- Civic Platform enables or disables the record type for the module.

Accessing Online Help for Record Types

You can access online help for Record Types by clicking the help button in the upper right corner of the portlet.

To access online help for record types

1. Access the Record Type Administration portlet ([Accessing Record Type Administration](#)).
 2. Click the online help button on the corner of the page to access online help.
- Civic Platform displays the help topic on record type configuration information.



Creating Record Type Filters

Civic Platform uses record type filters to show back-office users a filtered list of record types they can select from when creating records and performing other transactions which require them to select a record type. A record type filter shows a shorter and relevant list of record types which makes it easier for users to select record types.

An administrator can create record type filters for the various modules used by the agency, and for the various record transactions.

To create a record type filter

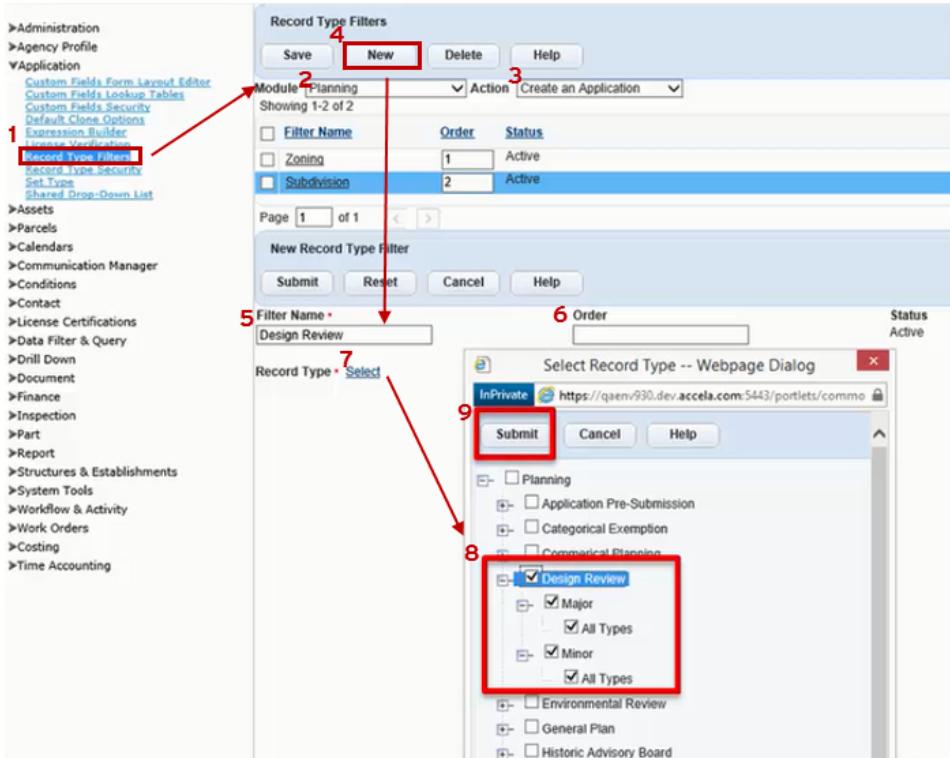
1. Go to Civic Platform Administration > Application > Record Type Filters.
2. On the **Module** dropdown list, select the module you want to add the record type filter to.
3. On the **Action** dropdown list, select the action with which the record type filter will be used. Choose one of the following:
 - **Create an Application** - The record type filter will be used in the record type selection list when a back-office or Citizen Access user creates a record (or application)
 - **Amend an Application** - The record type filter will be used in the record type selection list when a Citizen Access user creates a record amendment.
 - **Amend a Contact** - The record type filter will be used in the record type selection list when an authorized agent amends a contact in Citizen Access Account Management.
 - **Create a Hunting License** - The record type filter will be used in the record type selection list when an authorized agent creates a hunting license in Citizen Access.
4. Click **New**.
5. Enter the record type **Filter Name**.
6. Optionally enter the **Order** in which the record type filter will appear in the record type selection list.

7. Click **Select** to open the list of record types to include in the filter.

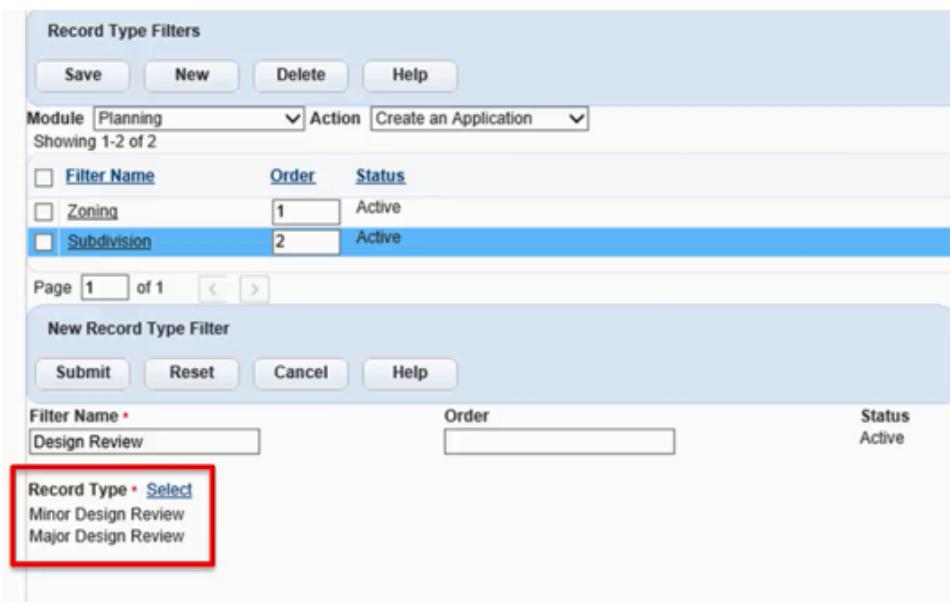
8. Mark the record types to be included in the filter.

9. Click **Submit** to finish selecting the record types.

The following diagram illustrates the summary of steps:



The following diagram shows the new sample record type filter, Design Review, and the record types included in the new filter:



The following diagram shows the list of record type filters for the Planning module and Create an Application action, which includes the newly created Design Review filter:

Record Type Filters

Filter Name	Order	Status
<input type="checkbox"/> Design Review	0	Active
<input type="checkbox"/> Zoning	1	Active
<input type="checkbox"/> Subdivision	2	Active

Page 1 of 1

Filter: DESIGN REVIEW

Filter Name *	Order	Status
Design Review	0	Active

Record Type * Select

- Minor Design Review
- Major Design Review

The following shows the record type selection window that is displayed when a back-office user creates a record. Note that the list of record types for the Planning module includes the new Design Review filter and its record types:

Select a record type

Search Record Type

Select Module

DESIGN REVIEW

- Major Design Review
- Minor Design Review

ZONING

SUBDIVISION

Cancel Help Create Application

Working with Address Type Groups

You can specify the Address Type Group Code name to associate with the application type. The purpose is to set the types of addresses you can use or add to an application type. Specify an Address Type Group Code name to enable Civic Platform to restrict an application type to only those specific address types listed in the Group Code name. For more information on associating an address to an application type, see [Configuring Other Associations](#).

You can set an application type, for example, new commercial building permit, to allow users to only add Street Address types and Parcel Address types to it. A user could also search for those same application types based on the Address Type.

Topics

- [Searching for an Address Type Group](#)
- [Creating an Address Type Group and Associating Address Types](#)
- [Adding an Address Type to an Address Type Group](#)
- [Deactivating an Address Type Group](#)

Searching for an Address Type Group

Before you can edit an existing Address Type group, you must search for it.

To search for an Address Type group

1. Access the Address Type Group portlet ([Accessing the Address Type Group Portlet](#)).
2. Click **Search**.

Civic Platform displays the Address Type Group search page.

3. Enter the Address Type Group name.

4. Click **Submit**.

Civic Platform displays the Address Type group name in the primary portlet, and the details for the group in the secondary portlet.

Address Type Group	Record Status	Updated Date	Updated By
Default	Active	05/14/2012	ADMIN

Creating an Address Type Group and Associating Address Types

You can create new Address Type groups as needed.

To create an Address Type group and associate Address Types

1. Access the Address Type Group portlet ([Accessing the Address Type Group Portlet](#)).
2. Click **New**.

Civic Platform displays the new Address Type Group Detail information in the detail portlet.

3. Enter the Address Type Group code name. This field is a code name or an abbreviation of the address types.

The Address Type Group names display in the Address Type Group Code drop-down list when a user creates or edits an application type. Define address types, to enable users to only associate those unique address types to certain application types. For example, you might require that new commercial building permits only allow users to enter Street Address types and Parcel Address types.

4. Click **Submit**.

Civic Platform creates the address type group.

5. Click the **Address Type** tab.

6. Click **Look Up** to locate and associate the address types with the Address Type Group name.

Civic Platform displays the Look Up page.

7. Enter the first few characters of an Address Type you want to locate and add it to the Address Type Group name.

The available Address Types are controlled by the Values specified for the REF_ADDRESS_TYPE Standard Choice.

8. Click **Submit**.

Civic Platform displays a list of Address Types that match your criteria.

Address Type	Description
<input type="checkbox"/>	Asset Address
<input type="checkbox"/>	Parcel Address
<input type="checkbox"/>	Right of Way
<input type="checkbox"/>	Street Row

9. Select the Address Type you want to add.

10. Click **Select**.

Civic Platform adds the Address Type to the Address Type Group.

11. To add additional Address Types, Click **Look Up** to return to the Address Type field and repeat through

Adding an Address Type to an Address Type Group

An Address Type group can contain multiple address types that allows a user to apply or search for when creating a specific application type. Follow these steps to add Address Types to an Address Type Group code name.

To add an Address Type to an Address Type group

- Locate and select the existing Address Type group or create a new Address Type group.

For instructions on searching for an existing Address Type group, see [Searching for an Address Type Group](#).

For instructions on creating a new Address Type group, see [Creating an Address Type Group and Associating Address Types](#).

Civic Platform displays the Address Type Group code name detail portlet, including the Group Detail tab and Address Type tab.

The screenshot shows the 'Address Type Group' detail portlet. At the top, there are buttons for 'Menu', 'Search', 'New', 'Delete', and 'Help'. Below this is a table with columns: 'Address Type Group', 'Record Status', 'Updated Date', and 'Updated By'. A single row is visible: 'Default', 'Active', '05/14/2012', and 'ADMIN'. Below the table, a section titled 'Address Type Group: Default' contains 'Group Detail' and 'Help' buttons. At the bottom, tabs for 'Group Detail' and 'Address Type (0)' are shown, with 'Group Detail' being the active tab. Underneath, a table shows 'Address Type Group Record Status' with rows for 'Default' and 'Active'.

- Click the **Address Type** tab in the detail portlet.

Civic Platform displays the Address Type tab.

The screenshot shows the same 'Address Type Group' detail portlet, but the 'Address Type' tab is now active. At the top, there are buttons for 'Menu', 'Look Up', 'Delete', and 'Help'. Below this is a table with columns: 'Address Type', 'Updated By', 'Updated Date', and 'Record Status'. A message at the bottom states '0 record(s) found.'

- Click **Look Up**.

Civic Platform displays the Look Up page.

The screenshot shows the 'Address Type Group: Default' Look Up page. At the top, there are buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. Below this is a table with columns: 'Address Type' and 'Description'. A text input field for 'Address Type' and a scrollable text area for 'Description' are shown. At the bottom, there is a link 'check spelling'.

- Enter the Address Type name or Description of the Address Type you want to add.

Civic Platform displays a list of Address Types that match your criteria.

<input type="checkbox"/> Address Type	Description
<input type="checkbox"/>	Asset Address
<input type="checkbox"/>	Parcel Address
<input type="checkbox"/>	Right of Way
<input type="checkbox"/>	Street Row

5. Select the Address Type you want to add.
6. Click **Select**.
To remove an Address Type, select it and click **Delete**.

Deactivating an Address Type Group

You can deactivate an Address Type group if it no longer applies within your agency.

To deactivate an address type group

1. Access the Address Type Group portlet ([Accessing the Address Type Group Portlet](#)).
2. Select the Address Type group you want to deactivate.
3. Click **Delete**.

To reactivate an inactive Address Type group, open the Address Type group you want to activate. In the detail portlet, select Active from the Record Status drop-down list, and then click **Save**.

Working with Application Status Groups

When you create or view an application, you have the option of applying a status to each application. Sometimes there is a group of applications that have the same list of statuses. For example, a group of electrical building applications can all have the same list of status options, but a group of real estate applications can have an entirely different list of statuses. In this case, you can create an Application Status Group that applies to a specific type of application.

Topics

- [Creating an Application Status Group](#)
- [Searching for an Application Status Group](#)
- [Editing an Application Status Group](#)

Creating an Application Status Group

If you do not find the status group you want, you can create a new status group.

To create an application status group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Application > App Status Group.

3. Search for the group you want. For instructions, see [Searching for an Application Status Group](#).
4. Click the red dot next to the group you want.
Civic Platform displays the Application Status Group—Edit window.
5. Click **Add** at the bottom of the window.
Civic Platform displays the Application Status Group—Add window.
6. Type in the status group and the status description that you want.
7. Click **Save**.

Searching for an Application Status Group

If you want to find a specific application status group, you can search for it.

To search for an application status group.

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Application > App Status Group.
3. Type in the group you are looking for and Click **Submit**, or just Click **Submit** to browse the groups.
4. Click the red dot that appears next to the status group that you want.

Editing an Application Status Group

In addition to editing an application status and the status group, you can also edit the status of the actual group.

To edit an application status group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Application > App Status Group.
3. Search for the group you want. For instructions, see [Searching for an Application Status Group](#).
4. Click the red dot next to the group you want.
Civic Platform displays the Application Status Group—Edit window.
5. Click the red dot next to the status you want to edit.
6. Update the field:

Status	If you want to make this status available to users, select Enable; otherwise, select Disable.
--------	---
7. Click **Save**.

Working with Intake Form Configuration Groups

This section describes how to create and define an Intake Form Configuration Group, with instructions for each section of the Intake Form Configuration Group, and how to include or exclude the field groups on certain types of applications.

For instructions on applying an Intake Form Configuration Group to an application type, follow the steps in [Configuring Other Associations](#).

Topics

- [Adding an Intake Form Configuration Group](#)
- [Searching for an Intake Form Configuration Group](#)
- [Editing an Intake Form Configuration Group](#)

Adding an Intake Form Configuration Group

An Intake Form Configuration Group enables you to specify parameters and settings for the fields on an intake form. For example, you can display or hide fields, choose whether those fields are mandatory or optional, specify where the fields display on the form, and so forth.

Intake Form Configuration Group Settings

You can set the following parameters for fields on intake forms:

- Display: Do you want the field to display on the form?
- Required: Is the field required or optional?
- Validate: Do you want to give users the ability to validate their entry against your database?
- Default Values: Do you want to display default values that tell users what information you expect them to enter? (This only applies to Contact sections)
- Display Button: Where do you want the field to display on the intake form?
- Display Order: Where do you want the field to display on the intake form?
- depending on the field type (for example, Default Values are only available for certain fields):

To add an Intake Form Configuration Group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. In the Application area, click Intake Form Configuration Group.
3. Click **Add**.
Civic Platform displays the Intake Form Configuration Group - Add page, illustrated in the sample screen below. The first column lists the intake form fields and its sections, starting with Record Detail; see [Table 49: Intake Form Fields and Sections](#) for a complete list. The columns that display horizontally across the top of the page contain the parameters you can set for each row listed in the first column.
4. Enter a name for your new Intake Form Configuration Group.
5. For each row in the first column, specify the parameter settings for the columns that display horizontally across the top of the page. For complete details of these settings, see [Table 48: Intake Form Configuration Group Parameter Settings](#).

SmartChoice Group - Add

	Display	Required	Validate	Default Value	Display Button	Display Order
CAP Detail:						1
Address:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			2
Parcel:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			3
Owner:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			4
Licensed Professional:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			5
Applicant:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	6
Contact1:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	7
Contact2:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	8
Contact3:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	9
Multiple Contacts:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Click to add contact types	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	9
Complainant Info:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				10
Complaint Info:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				11
Additional Info:	<input checked="" type="radio"/> Yes <input type="radio"/> No					12
Application Status:	<input checked="" type="radio"/> Yes <input type="radio"/> No					13
Application Specific Info:	<input checked="" type="radio"/> Yes <input type="radio"/> No					14
Associated GIS Features:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				15
Structure:	<input checked="" type="radio"/> Yes <input type="radio"/> No			AAA		16
Establishment:	<input checked="" type="radio"/> Yes <input type="radio"/> No					17
Event:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				18
Asset:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				19
Application Specific Info Table:	<input checked="" type="radio"/> Yes <input type="radio"/> No					20
Documents:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				21
Education:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				23
Continuing Education:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				24
Examination:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				25
Comments:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				26

Table 48: Intake Form Configuration Group Parameter Settings

Display	Click Yes to display the field on the intake form. Click No to hide the field on the intake form.
Required	Click Yes to require the user to complete this field. If you click Yes, users cannot submit the form unless the form contains the required information. Click No to make this field optional. If you click No, users can submit the form without entering a value in this field.
Validate	Click Yes to enable a Validate button on the form. If a section requires validation, users can only search and add information from the reference database into the section. The reference database can be the local Civic Platform database, an external data source that holds address, parcel, owner data, or data from 'PERMITS' Plus, Kiva, or GIS. If you click Yes at the Validate and Required options of the Applicant or Contact section, all the other sections and the fields in the intake form are inactive until users validate the section. If a contact list requires validation, you only need to validate the primary contact in the list. Click No to disable validation. If a section does not require validation, users can enter new information or modify the information that they select from the reference database.

Default Value	<p>Specify a default value from the drop-down list to indicate the information you expect the user to enter in the field. For example, if users generally enter billing information in this form, you can set the default value for a contact field to “billing contact,” so that a user who is completing the form sees “Billing Contact” in the field.</p> <p>For the Multiple Contact fields, click the “Click to add contact types” link and add the default contact types and the minimum number of contacts a user must enter. When you set default values to “required,” users must enter the information on the form before Civic Platform allows them to submit the form.</p>
Display Button	<p>Check the As Owner option to display the As Owner button in this section on the form. To hide this button, clear the check box.</p> <p>Check the As Lic Pro option to display the As Lic. Pro button in this section on the form. To hide this button, clear the check box.</p> <p> Note: In Civic Platform 7.1.0 or earlier versions, the display of the As Owner and As Lic. Pro buttons on the Applicant and Contact sections was controlled by FID 8235-Search Owner and FID 0008 Reference Licensed Professionals. Upgrading Civic Platform to Version 7.2.0 automatically migrates the display settings of the As Owner and As Lic. Pro buttons to Intake Form Configuration Group configuration.</p>
Display Order	Enter a Display Order number that represents the field's position on the form. For example, to display the Record Detail first on the form, enter 1.

Table 49: Intake Form Fields and Sections

Record Detail	The Record Detail section of a form displays the details of the record. The only parameter that you can set for this section is the Display Order.
Address	<p>The address section of an intake form lets users enter the address of the primary parcel, including a range of street and unit numbers.</p> <p>If you set the Display and Required parameters in this section to Yes, Civic Platform validates whether a user adds information to the Addresses section on the Location tab upon the submittal of a new record.</p>
Parcel	<p>The parcel section of an intake form lets users enter information about the parcel. The County Assessor’s Parcel Number (APN) determines the parcel information.</p> <p>If you set the Display and Required parameters in this section to Yes, Civic Platform validates whether a user adds parcel information to the Parcels tab upon the submittal of a new record.</p>
Owner	<p>The owner section of an intake form lets users enter information about the individual or institution that owns the parcel, property, or structure.</p> <p>If you set the Display and Required parameters in this section to Yes, Civic Platform validates whether a user adds owner information to the People tab upon the submittal of a new record.</p>
Licensed Professional	<p>The licensed professional section lets users enter contractor, architect, engineer, or developer (CAED) information. The state usually provides this information, including the license number and license type.</p> <p>If you set the Display, Required, and Validate parameters in this section to Yes, Civic Platform validates whether a user adds licensed professional information to the People tab upon the submittal of a new record.</p>

Applicant	<p>The applicant section lets users enter information about the individual or institution who submits the form. If you set the Validate and Required parameters in this section to Yes, the Validate button displays in this section. All other sections of the form are inactive, and the user must complete the Applicant section and click the Validate button to activate the other sections. You cannot activate this section if you activated the Multiple Contacts section.</p> <p>If you set the Display, Required, and Validate parameters in this section to Yes, Civic Platform validates whether a user adds applicant information to the People tab upon the submittal of a new record. If you specify a default value for this section, Civic Platform also validates whether a user adds the required type of applicant.</p>
Contact 1	Up to three Contact sections on a form let users enter information about billing, legal, and any additional contacts.
Contact 2	
Contact 3	<p>If you set the Validate and Required parameters in any Contact section to Yes, the Validate button displays in the section. All other sections of the form are inactive, and the user must complete any Contact sections and click the Validate button to activate the rest of the form.</p> <p>If you set the Display, Required, and Validate parameters in this section to Yes, Civic Platform validates whether a user adds contact information to the People tab upon the submittal of a new record. If you specify a default value for this section, Civic Platform also validates whether a user adds the required type of contact.</p> <p>NOTE: You cannot activate this section if you activate the Multiple Contacts section.</p>
Multiple Contacts	<p>Set the Display option to Yes to display multiple contacts as a list and to allow users to add more than three contacts. From the list of contacts, users can set a primary contact and can search for, add, and delete contacts.</p> <p>When you activate the Multiple Contacts section, you cannot activate the Applicant and Contact 1, Contact 2, and Contact 3 sections.</p> <p>If you set the Validate and Required parameters in this section to Yes, the Validate button displays in this section. All other sections of the form are inactive, and the user must complete the section and click the Validate button to activate the other sections. If you set the Required parameter to Yes and Validate to No, Civic Platform only enforces the Required parameter.</p> <p>Note: Multiple Contacts require the intake form available in Civic Platform 6.5. To get this form contact Accela Customer Support and request the <i>Civic Platform 6.5.0 Migration Document</i> for application intake form consolidation (07ACC-03396) to migrate to the new intake form.</p> <p>If you set the Display, Required, and Validate parameters in this section to Yes, Civic Platform validates whether a user adds contact information to the People tab upon the submittal of a new record. If you specify a default value for this section, Civic Platform also validates whether the user added the required type of contact.</p>
Complainant Information	<p>The complainant section lets users enter information to identify an individual or institution who registers a complaint. Only include this section for intake forms that you use in the code enforcement module.</p> <p>NOTE: The complaint and complainant sections of an Intake Form Configuration Group only work with Classic Administration - Daily User. They do not work in V360. Best practice is to configure Complaint and Complainant fields in Application Specific Information or Application Specific Information Tables for the enforcement record types.</p>

Complaint Information	<p>The complaint section lets users enter a description of a complaint, including the reported address. Only include this section for intake forms that you use in the code enforcement module.</p> <p>NOTE: The complaint and complainant sections of an Intake Form Configuration Group only work with Classic Administration - Daily User. They do not work in V360. Best practice is to configure Complaint and Complainant fields in Application Specific Information or Application Specific Information Tables for the enforcement record types.</p>
Additional Information	<p>The additional information section lets users enter information that the U.S. Census Bureau requires in a C404 report. This report, also known as the "Report of Privately-owned Residential Building or Zoning Permits Issued," surveys new residential units, additions, and alterations.</p>
Application Status	<p>Click Yes to display the Application Status. Civic Platform displays the Application Status based on the Application Status Group assigned to the Application Type. Click No to hide the Application Status.</p>
Application-Specific Information	<p>The application-specific information section enables you to enter custom information specific to your agency.</p>
Associated GIS Features	<p>For information about GIS, refer to the Accela Civic Platform GIS Administrator Guide. If you set the Display and Required parameters in this section to Yes, Civic Platform validates whether a user adds GIS features to the Map Objects section on the Location tab upon the submittal of a new record.</p>
Structure	<p>The structure section lets users enter information about any structures under construction. For example, "Twin Pines Mall."</p>
Establishment	<p>An establishment is a business or residence that occupies space in a structure. For example, users can enter information about a store in a mall.</p>
Event	<p>The event section lets users access an existing calendar and schedule an event related to the intake form.</p>
Asset	<p>Click Yes to display the Asset Section in a new permit intake form. Click No to hide the Asset Section in a new permit intake form. If you set the Display and Required parameters in this section to Yes, Civic Platform validates whether a user adds asset information to the Assets tab upon the submittal of a new record.</p>
Application- Specific Info Table	<p>Click Yes to display the ASI Table section in a new permit intake form. Click No to hide the ASI Table section in a new permit intake form.</p>
Documents	<p>The documents section lets users attach documents, such as building plans or an insurance bond, to a permit application. The value you enter in the Default Value field indicates the number of documents users can attach. You can configure the maximum number of documents or set a fixed number of documents in the Default Value field. If you set the Default Value to null, there is no limit to the number of documents you can allow users to add to a permit application.</p> <p>To set a maximum number of documents, enter "<#>" in the Default Value field. For example, if you want to set the maximum number of documents at 10, enter <=10. You can also set a maximum number of documents by entering <#>. For example, if you want to set the maximum number of documents at 10 or fewer, enter <11. To set a fixed number of documents, enter "=#" in the Default Value field. For example, if the fixed number of documents is 5, enter =5.</p> <p>If you set the Display and Required parameters in this section to Yes, Civic Platform validates whether a user adds a document to the Attachments tab upon the submittal of a new record.</p>
Education	This section lets users enter the Education credentials of a licenced professional.

Continuing Education	This section lets users enter the Continuing Education credentials for a licenced professional.
Examination	This section lets users enter the Examination details of a licenced professional.
Comments	This section lets users enter any additional description or details about the application.

Searching for an Intake Form Configuration Group

To edit an existing Intake Form Configuration Group, you first need to find the group in your system. To see a list of all Intake Form Configuration Groups, click **Submit** without entering the details about an individual group.

To search for an Intake Form Configuration Group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Application > Intake Form Configuration Group.
3. Enter the name of the group that you want to find in the Group Name field.
4. Click **Submit**.
Civic Platform displays the Intake Form Configuration Group browse page.
5. Click the red dot that appears next to the group that you want.

Editing an Intake Form Configuration Group

After you set up an Intake Form Configuration Group, you might need to change certain details about it. You can change the standard sections that you want to display in a group, as well as change the required and validation status of each section.

You cannot change the group name.

To edit an Intake Form Configuration Group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Application > Intake Form Configuration Group.
Civic Platform displays a list of Intake Form Configuration Groups.
3. Click the red dot by the Intake Form Configuration Group that you want to edit.
Civic Platform displays the Intake Form Configuration Group Details-Edit page.

SmartChoice Group Details - Edit
Use this form to edit the group details

Group Name: BLD_GENERAL

	Display	Required	Validate	Default Value	Display Button	Display Order
CAP Detail:						1
Address:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No			2
Parcel:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No			3
Owner:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No			4
Licensed Professional:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No			5
Applicant:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	6
Contact1:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	7
Contact2:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	8
Contact3:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	9
Multiple Contacts:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Click to add contact types	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	10
Complainant Info:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				11
Complaint Info:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				12
Additional Info:	<input checked="" type="radio"/> Yes <input type="radio"/> No					13
Application Status:	<input checked="" type="radio"/> Yes <input type="radio"/> No					14
Application Specific Info:	<input checked="" type="radio"/> Yes <input type="radio"/> No					15
Associated GIS Features:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				
Structure:	<input type="radio"/> Yes <input checked="" type="radio"/> No			AAA		16
Establishment:	<input type="radio"/> Yes <input checked="" type="radio"/> No					17
Event:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				18
Asset:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				19
Application Specific Info Table:	<input type="radio"/> Yes <input checked="" type="radio"/> No					20
Documents:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				21
Education:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				23
Continuing Education:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				24
Examination:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				25
Comments:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				26

Save **Cancel**

4. Update the values for each section of the application as defined in [Table 48: Intake Form Configuration Group Parameter Settings](#) and [Table 49: Intake Form Fields and Sections](#).
5. Click **Save**.

Working with Virtual Folder Groups

When you upload an attachment in Civic Platform, the user who uploads the attachment can select from a pre-defined list of folders or create a new virtual folder as appropriate. However, Citizen Access users can only select from the pre-defined virtual folder group to upload attachments. Assignment of attachments to virtual folders serves the same purpose as an actual folder: It allows users to organize uploaded attachments into groups (folders), making it easier to keep track of those attachments.

You can create as many virtual folders and folder groups as you need, by creating standard choices (virtual folder groups) with the desired values (virtual folders) you want to use. You can then associate each virtual folder group with a corresponding record type.

**Note:**

Existing users with file upload permissions (FID 8212) can edit the virtual folder settings.

Topics

- [Accessing the Virtual Folder Group Settings](#)
- [Creating a New Virtual Folder Group](#)
- [Viewing or Editing a Virtual Folder Group](#)
- [Assigning a Virtual Folder Group to a Record Type](#)

Accessing the Virtual Folder Group Settings

1. Access the Record Type Administration portlet ([Accessing Record Type Administration](#)).
2. Expand the module you want to work with by clicking the down arrow on the right side of the module bar.
A list of existing record types displays.
3. Select the record type for which you want to create a virtual folder group by clicking the record type alias hyperlink. If you have a large number of record types, you can use Search to locate the desired record type by name.
The record type summary displays.
4. In the left panel, click **Other Associations**.
5. From the list of associations at the top of the window, click **Virtual Folder Group**.
Civic Platform displays the Virtual Folder Group settings.

Creating a New Virtual Folder Group

You can add new virtual folder groups directly from the Record Type Administration portlet.

To create a new virtual folder group

1. Access the Virtual Folder Group Settings ([Accessing the Virtual Folder Group Settings](#)).
Civic Platform displays the Virtual Folder Group settings.
2. Click **Create New Virtual Folder Group**.
The New Standard Choice form displays in a new window.

3. Enter the name of the new virtual folder group you are creating in the Standard Choices Item Name field.
4. Describe the folder group you are creating; enter usage and relevant information.
5. In the Status field, select **Enable**.
6. In the Type field, select **Business Configuration**.
7. Select **Virtual Folder** from the drop-down list below the Type field.
8. Click **Submit**.
Civic Platform creates the new Virtual Folder Group. Now you must add virtual folders to your group.
9. Click **Add** at the bottom of the window (below the Standard Choices Value banner).
The Add Standard Choices Value form displays in a new window.
10. Enter the name of the virtual folder you want to add to the group in the Value field.
11. In the Value Desc field, describe the folder group you are creating; enter usage and relevant information.
12. In the Status field, select **Enable**.
13. Click **Submit**.
Civic Platform adds the new folder below the Standard Choices Value banner.
14. Repeat from for each folder you want to add to the group.
15. When you finish adding folders, click **Update** to save your new virtual folder group and folders.
16. Close the window and return to the Virtual Folder Groups section of the Other Associations tab on the Record Settings portlet.
17. Click Refresh .
The new virtual folder group is now available for assignment to a record type in the drop-down list to the far left.

Viewing or Editing a Virtual Folder Group

You can access virtual folder group details directly from the Record Type Administration portlet.

To view or edit Virtual Folder group details

1. Access the Virtual Folder Group Settings ([Accessing the Virtual Folder Group Settings](#)).
Civic Platform displays the Virtual Folder Group settings.

2. Select the virtual folder group you want to view/edit.
3. Click the View/Edit link to the right of the field.
The Standard Choices Item - Edit window displays.
4. Make modifications to the settings as needed.
5. click **Update** if you made changes, then close the window.

Assigning a Virtual Folder Group to a Record Type

To make virtual folders available for use to users, you must assign the appropriate virtual folder group to each record type. You can create a unique virtual folder group for each record type. You can also assign a single virtual folder group to multiple record types. You cannot, however, assign multiple virtual folder groups to a single record type.

To assign a virtual folder group to a Record Type

1. Access the Virtual Folder Group Settings ([Accessing the Virtual Folder Group Settings](#)).
Civic Platform displays the Virtual Folder Group settings.
2. Select the virtual folder group you want to associate with the current record type.
If you do not see the virtual folder group you need, you might need to add it. See [Creating a New Virtual Folder Group](#) for information about adding a new virtual folder group.
3. Click **Save** in the left side panel, near the bottom.
Civic Platform assigns the selected virtual folder group to the current record type. Folders contained within are available to users when they upload documents to records of the current type.

Associating Record Types

You can define record types that are dependent on other record types. A use case example for this is: when public users pay fees for a record type in their shopping cart, they must also complete the application or renewal for the dependent record types. Otherwise, the user receives a payment failure message.

For instance, a nurse applies for a nurse practitioner license, and their registered nurse license expires. Upon check-out for the nurse practitioner license, the nurse sees on the cart page a payment failure message informing them that they must renew and pay for the registered nurse license. After renewing and paying for the registered nurse license, the nurse can pay for both types of licenses in the shopping cart.

When nurses renew and pay for their registered nurse licenses, they see an associated nurse practitioner license link for application on the receipt page in the shopping cart.

To associate record types

1. Access the Record Type Administration portlet ([Accessing Record Type Administration](#)).
2. Expand any module to reveal the associated record types.
3. Locate the record type you want to work with.
4. Click the Other Associations portlet.
5. Locate the Associated Record Types section.
6. Do any of the following to define a record status for the selected record type:

- To define the selected record type with no status, click the **No Status** link.
- To define the selected record type with a status group, click the status group link.

If you do not see any status group other than the **No Status** link, customize the Status Group section. For more information about Status Group, see [Working with Application Status Groups](#).

- To define the selected record type with a specified record status, do the following:
- a. Expand the desired record status group to display the statuses within that group.

Group	Status	Record Type Alias	Record Type
Building Public User	Issued	Building/Building Dept/Commercial/Plumt	Building/ACA/Amy/ssssddd
Building Public User	Permit Issued	Building/Building Dept/Commercial/Plumt	Building/AAM/Work Order/yummy

- b. Click any of the record status.

Civic Platform displays the Record Type List.

Record Type Alias	Record Type
A-Jeffrey Contact test	Building/A-Jeffrey Type/Contact test/General template
Building/AAM/Work Order/Hendry	Building/AAM/Work Order/Hendry
yummy	Building/AAM/Work Order/yummy
Building/ACA/ASl/fish	Building/ACA/ASl/fish
Building/ACA/Amy/test	Building/ACA/Amy/test
ssss	Building/ACA/Amy/ssssddd
Building/ACA/Grady/Contact	Building/ACA/Grady/Contact
Building/ACA/Grady/zq	Building/ACA/Grady/zq
Jeffrey.document	Building/ACA/Jeffrey/Jeffrey
Jeffrey.Education	Building/ACA/Jeffrey/Edu/Jeffrey.Edu
Mo.test	Building/ACA/Moore/appooo
Building/ACA/Payment/APIs	Building/ACA/Payment/APIs
Building/ACA/Peggy/Contacts	Building/ACA/Peggy/Contacts
Building/ACA/Peggy/List	Building/ACA/Peggy/List

7. Select the Record Type you want to associate.

8. Click **Select**.

An information pops up.

9. Click **OK**.

Civic Platform associates a record type with another record type.

The screenshot shows the 'BLD_STATUS' record type configuration. On the left, a tree view lists 'Complete', 'Hold on', 'Issued', and 'No Status'. On the right, a table displays associations between groups and record types:

	Group	Status	Record Type Alias	Record Type
<input type="checkbox"/>	Building Public User	Issued	Building/Building Dept/Commercial/Plumt	Building/AAM/Work Order/yummy
<input type="checkbox"/>	Building Public User	Permit Issued	Building/Building Dept/Commercial/Plumt	Building/ACA/Amy/ssssddd
<input type="checkbox"/>	Building Public User	yummy		Building/AAM/Work Order/yummy

At the bottom, there is a 'Delete' button.

10. Click Save.

The screenshot shows the 'BLD_STATUS' record type configuration after saving. The 'Save' button is highlighted. The table now includes a new row for 'Hold on' status:

	Group	Status	Record Type Alias	Record Type
<input type="checkbox"/>	Building Public User	Hold on	yummy	Building/AAM/Work Order/yummy
<input type="checkbox"/>	Building Public User	Issued	Building/Building Dept/Commercial/Plumt	Building/ACA/Amy/ssssddd
<input type="checkbox"/>	Building Public User		Building/Building Dept/Commercial/Plumt	Building/AAM/Work Order/yummy

Setting Default Clone Options

You can define default clone options that display when users invoke Clone Sgl and Clone Mult.



Note:

The Default Clone Options portlet must be enabled (FID 0367) before you can set default clone options by record type.

To set default Clone Options

1. Access the V360 Administration portlet.
2. In the Setup panel, select **Application > Default Clone Options**.
The Default Clone Options portlet displays.
3. Select the record type for which you want to set default clone options.
You can use either the tree view to drill down to the record type you want to use. You can also click **Search** to locate the record type you want.
A list of data options displays.

The screenshot shows a configuration interface for a 'Commercial Building Permit'. At the top, there are three buttons: 'Save', 'Reset', and 'Help'. Below these are two main sections: 'Record Type - Specific Information' and 'General Record Information'. The 'Record Type - Specific Information' section contains several checkboxes for items like 'Fee Items', 'Workflow Status', 'Inspection', 'App Specific Info (Select)', 'Additional Info', 'Valuation Calc', 'Workflow Task Specific Information', 'Status or New Status: -Select- ▾', and 'Status History'. The 'General Record Information' section also contains checkboxes for various record types and details, including 'Record Details', 'Parcel', 'Owner', 'Address', 'Assets', 'Licensed Professionals (Select)', 'Contact (Select)', 'Document', and 'Preserve Dates'. Some options like 'Record Details', 'Parcel', 'Owner', 'Address', 'Assets', 'Contact (Select)', and 'Document' have a '(Select)' link next to them.

4. Select which data you want to copy from the source record to the destination record. You can select a single option or multiple options.

If you select an option that has a **Select** link, use the link to drill down to more specific data. For example, you can click the **Select** link for Contact to select which contact types you want to copy.

5. Click **Save**.

Managing Documents for Attachments

- [Enabling Users to Upload and Download Documents](#)
- [Creating a Document Group](#)
- [Searching for a Document Group](#)
- [Editing a Document Group](#)
- [Working with Document Types](#)
- [Setting Required Document Types](#)
- [Large File Upload in Civic Platform](#)

Enabling Users to Upload and Download Documents

To enable users to upload and download documents, configure your agency Security Policy as shown below.

Users can download and print multiple documents at one time. See the *Civic Platform User Guide* for details on downloading and printing documents.

To enable users to upload and download documents

1. Go to Classic Administration and select **Agency Profile > Security Policy > EDMS Access Security > <EDMS NAME>**

The screenshot shows the 'Agency Security Policies' section of the Civic Platform. It includes a header with the City of Metropolis logo and navigation links like 'Menu', 'Favorites', 'Switch Agency', 'Help', 'Logout', and 'Civic Platform'. The user ID is shown as 'ADMIN'. Below the header, there are tabs for 'Admin Tools' (selected), 'Daily', 'ACCELA A', and other modules. The main content area is titled 'Agency Security Policies' and shows a table for 'Policy - EDMS Security' with a scope of 'Agency, Module or User Group'. The table has columns: 'Agency, Module or Group Name', 'Upload', 'Download', 'View', 'Delete', 'Status', 'Default', and 'Authentication'. Three rows are listed: 'QA', 'Building-BUILDINGADMIN', and a partially visible row. The 'Upload' and 'Download' columns for all three rows are highlighted with a red box. The 'Status' column for all rows shows 'Enable' with a dropdown arrow. The 'Default' and 'Authentication' columns show 'None' with dropdown arrows. At the bottom of the table are 'Save' and 'Cancel' buttons.

Agency, Module or Group Name	Upload	Download	View	Delete	Status	Default	Authentication
QA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable <input type="button" value="▼"/>	<input type="checkbox"/>	None <input type="button" value="▼"/>
Building-BUILDINGADMIN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable <input type="button" value="▼"/>	<input type="checkbox"/>	None <input type="button" value="▼"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable <input type="button" value="▼"/>	<input type="checkbox"/>	None <input type="button" value="▼"/>

2. Select the download and upload options for the agency, module, or group where you want to enable downloading multiple documents.
3. Click **Save**.
4. Repeat steps 1-3 for each EDMS that is configured in your Civic Platform environment.

Creating a Document Group

A document group lets you organize the different types of documents that users might need to add to certain applications. When you create a new document group, you determine the group name and add an initial document type to the group. You can add more document types to the group when you edit it.

To create a document group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Review > Document**.
3. Click **Add**.
Civic Platform displays the Document Type Add page.

Document Type - Add
Use this form to add new Document Type

Select Group:	DEVELOPMENT	or	New Group * :	DEVELOPMENT
Document Type * :	<input type="text"/>			
Template:	<input type="text"/>			
Document Status Group:	<input type="text"/>			
Document Review Status Group:	<input type="text"/>			
Checklist Group:	<input type="text"/>			
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
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
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
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
Comment:	(4000 char max)			
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>				
<small>Licence Type</small> <small>Licence Type</small> <small>Licence Type</small> <small>Licence Type</small>				

4. Create a new document group by providing a name in the New Group field.
5. Add Document Types to the Document Group. For specific instructions on how to add document types, see [Adding a Document Type](#).

Searching for a Document Group

You can search for any document group currently defined on your system. For example, you can search for a document group if you want to add or update document types, or if you want to view the details for a certain group. To see a list of all document groups in alphabetical order, click **Submit** without entering any information in the search field. You can also enter partial information to perform a partial search.

To search for a document group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Review > Document**.
3. Enter the group name in the **Select Group** field.
4. Click **Submit**.
Civic Platform displays the Document Group—Browse page.
5. Click the red dot that appears next to the group that you want.

Editing a Document Group

After you create a document group, you might need to change it. When you edit a document group, you can change any of the document types that make up the group. After you create a document group, you cannot delete the group without first deleting all document types that make up the group. When you delete the last document type, Civic Platform automatically deletes the group.

To edit a document group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Attachments > Documents**.
3. Search and select the document group you want to modify.

4. To add, edit, or delete an additional document type, see [Adding a Document Type](#).
5. Click **Submit**.

Working with Document Types

This section provides instructions on how to work with document types associated with a document group and, if your agency uses Citizen Access, define how to apply permissions to public users for the document type.

Topics

- [Adding a Document Type](#)
- [Editing a Document Type](#)
- [Deleting a Document Type](#)

Adding 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. If your agency uses Citizen Access, you must indicate which public users have permissions to view, upload, and delete the document type attachment online. The public user types include: All Citizen Access users (including anonymous users), registered users, Licensed Professionals, Record Creator, Contact, and Owner. Administrators can specify which licensed professionals can upload, delete, or view the document type by clicking the License Type button and selecting the appropriate options. 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 “Defining Citizen Access Permissions for a Document” in the *Accela Civic Platform User Guide*.

To add a document type

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Attachments > Document**.
3. Search for the document group that you want.
4. Click **Add**.

Civic Platform displays the Document Type-Add page.

Document Type - Add

Use this form to add new Document Type

Select Group: DEVELOPMENT **or New Group *:** DEVELOPMENT

Document Type * :

Template:

Document Status Group:

Document Review Status Group:

Checklist Group:

Download Automatically to Accela Wireless: Yes No

Set Permission for ACA: Yes No

Title Viewable in ACA: All ACA Users Registered ACA Users CAP Creator Licensed Professional Contact Owner

Downloadable in ACA: All ACA Users Registered ACA Users CAP Creator Licensed Professional Contact Owner

Uploadable in ACA: All ACA Users Registered ACA Users CAP Creator Licensed Professional Contact Owner

Deletable in ACA: All ACA Users Registered ACA Users CAP Creator Licensed Professional Contact Owner

Comment: (4000 char max)

License Type
License Type
License Type
License Type

Submit **Cancel**

5. Complete one of these fields to define the document group code:

Select Group	Choose an existing document group.
New Group	Type in what you want to name the new group.

**Note:**

You should not enter a new group name here unless you want to create a new group as well as a new document type. When you choose an existing group, Civic Platform automatically populates this field with your choice, because this field is a required field.

6. Complete the document type fields as described in [Document Type Fields](#).

If you want to specify the licensed professional types allowed to upload, delete, or view the document type in Citizen Access, click **Licensed Professional**, indicate the specific licensed professional types, then click **Select**.

7. Click **Submit**.

Table 50: Document Type Fields

Checklist Group	Select a checklist group for the document type. Upon a successful upload of a document, if a checklist group is associated with the document type of the document, Civic Platform automatically adds the Auto Create checklists in the checklist group as the document review checklist for the document. Users can add more checklists or checklist items for the document review if they want. The steps to configure checklists and checklist groups for document reviews are the same as configuring checklists and checklist groups for inspections. For more information, see Managing Checklist Groups .
Comment	Enter any comments or notes about the document type.

Deletable in Citizen Access	Select which public users have permission to delete the document in ACA.
Document Group	Document Group is a read-only field that displays the name of the Document Group for the Document Type.
Document Type	Enter the document type that you want to include in the group.
Download Automatically to Accela Wireless?	Select Yes if you want to download files of this document group automatically to Accela Wireless; otherwise, select No .
Downloadable in Citizen Access	Select the users for which you want to grant permission to download the documents of this document type. When you select Licensed Professional, click the License Type button to select the desired licensed professionals.
Set Permissions for Citizen Access	Select Yes to grant permission on documents of this document type to Citizen Access users; otherwise, select No .
Uploadable in Citizen Access	Select those individuals for which you want to grant permission to upload documents of this document type. When you select Licensed Professional, click the License Type button to select the desired licensed professionals. For users without Title Viewable in Citizen Access permission, if you grant this permission to them, they can upload documents of this document type, but they cannot view them in the document list.
Title Viewable in Citizen Access	Select those individuals for which you want to grant access to view the document titles of this document type. When you select Licensed Professional, click the License Type button to select the desired licensed professionals. Note: Those users without this permission consequently cannot download or delete documents of this document type, even though they have the downloadable and deletable permissions.

Editing a Document Type

After you add a document type to a document group, you might need to change it. You can update type name as well as any comments about it. If you no longer want to include the document type in the group, you can delete it.

To edit a document type

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Review > Document**.
3. Search for the document group that you want.
4. Click the red dot that appears next to the document type that you want.
Civic Platform displays the Document Type-Edit page.
5. Complete the necessary fields as described in [Document Type Fields](#).
6. Click **Submit**.

Deleting a Document Type

You can delete any document type in a document group. After you delete the last document type in a group, Civic Platform automatically deletes the group. Civic Platform prompts you when this happens and gives you the option to cancel the deletion of the document group.

To delete a document type

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Review > Document**.

3. Search for the document group that you want.
4. Click **Delete** to the right of the document type that you want.
5. Click **OK**.

Setting Required Document Types

Agencies can configure Civic Platform to require certain documents when an agency user submits a new application of a given type. Agencies can also configure document requirements when a public user submits a new application of a given record type via Citizen Access or Mobile Office. Agencies can also configure Civic Platform to require certain documents before a workflow task status change occurs.

You can access the Required Document Setting form both from the Administration tool in Civic Platform and from the Citizen Access Setup form. The following procedure describes how to access the Required Document Setting from the Administration tool.

The Role of Scripting in Required Document Functionality

Agencies can use existing EMSE scripting functionality to require documents dynamically as part of new or existing record processing. For example, agencies can create a script that auto-applies a notice condition that prompts for the required documents after a new application submission (`ApplicationSubmitAfter`) or after a workflow status update (`WorkflowTaskUpdateAfter`). Agencies can also create a script (`DocumentUploadAfter`) that clears required document conditions once required documents get uploaded. Agencies may have more complex document submission requirements. For example, agencies may configure a page flow in Citizen Access Administration to prompt for or validate required documents by associating scripts to the `OnLoad` or `OnSubmit` event in the relevant step. Agencies can write the script to block or not to block the page flow if a validation fails. For existing records, agencies can use scripting to enforce or prompt for required document submissions against various business rules for events like workflow status update (`WorkflowTaskUpdateAfter`) or application specific info update (`ApplicationSpecificInfoUpdateAfter`).

Setting Required Document Types by Record Type

When you set required documents, the list of required documents displays on the application intake form when a user adds a new record from Civic Platform, Citizen Access, or Accela Mobile Online. This informs the user which documents he must prepare and submit. If the user does not attach the required documents, he cannot submit the application.



Note:

If EDMS is not accessible from Citizen Access, the public user may be able to submit his application without the required documents.

Before you can set required documents, you must have the following in place:

- The desired document group code and assigned documents types for that group code must exist and have an association with the record type you are working with. See [Managing Documents for Attachments](#).
- The document group code to which you apply required document settings must be consistent for both Civic Platform and Citizen Access, if the record type you are working with is available to both Civic Platform and Citizen Access.

To set required document types by record type

1. Access the Record Type Administration portlet ([Accessing Record Type Administration](#)).

2. Expand the module you want to work with by clicking the down arrow on the right side of the module bar.

A list of existing record types displays.

3. Select the record type for which you want to set required document types by clicking the record type alias hyperlink. If you have a large number of record types, you can use Search to locate the desired record type by name.

The record type summary displays.

4. In the left panel, click Other Associations.

5. From the list of associations at the top of the window, click Document Code.

Civic Platform displays the Document Code settings. A document group code must be assigned to the record type you are working with. If not, you must assign a document group code. See “Managing Documents for Attachments” for more information about assigning or changing a document group code.

6. Click the **View Edit** link for Required Document Types.

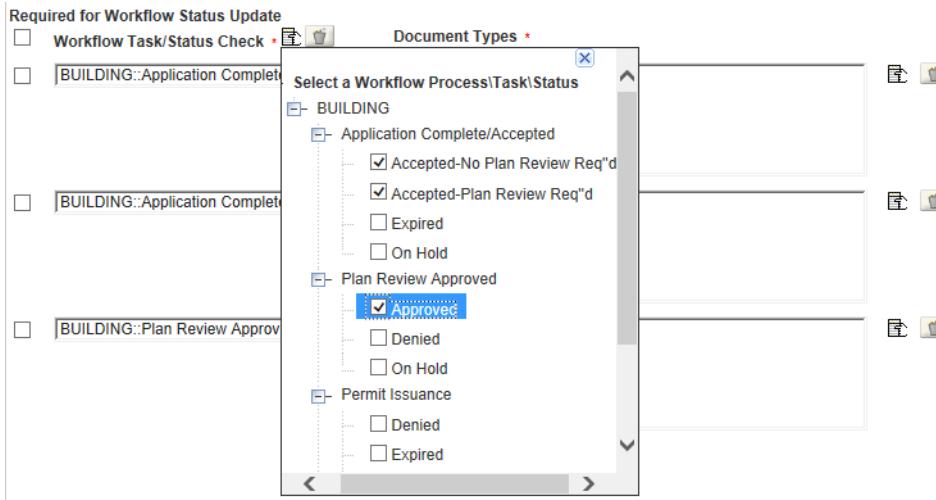
The Required Document Setting form displays.

7. To set required documents for new record submission:

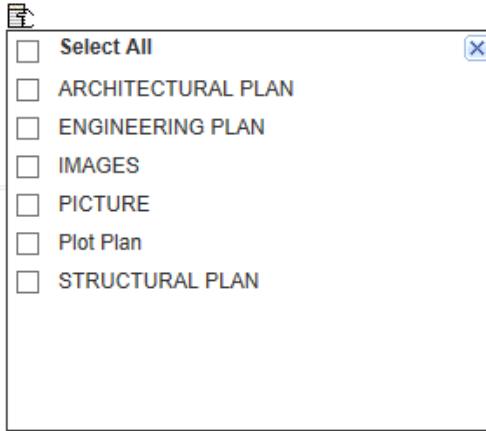
- Click the picker to the right of Required for New Record Submission. A widget displays a list of documents included in the selected document group.
- Select the document type(s) that your agency wants to require as part of a new record submission. If needed, you can mark Select All to require all the listed documents. The selected document types display in the Required for New Record Submission box.

8. To set required documents for a workflow task status update:

- Click the picker to the right of Workflow Task/Status Check.
- Select each task status for which you want to require a document submittal.
- Each time you select a task status, Civic Platform adds a new row to the Required for Workflow Status Update list. In the example below, we selected three workflow status options. Civic Platform added three rows - one for each status option - for you to configure individually.



9. Click outside the widget to exit the widget and interact with the new rows.
10. Click the picker to the right of the Document Types box for one of the workflow task/status check rows. A widget displays the list of document types for the selected document group.



11. Select the document type(s) that your agency wants to require before the workflow can advance with the selected status. If needed, you can mark **Select All** to require all the listed document types. The selected document types display in the Document Types box.
12. Repeat the previous two steps for each workflow task you have listed.
13. Click **Save**.

Large File Upload in Civic Platform

When uploading a single file in Civic Platform, a 1GB maximum file size is supported. When uploading multiple files, 10 files may be uploaded in one batch. No single batch should exceed 1GB.

Configuring Large File Upload in Civic Platform

The EDMS Standard Choice parameter EDMS_DOCUMENT_SIZE_MAX allows the user to determine the default maximum size for EDMS document attachments. Modify the value of the Standard Choice EDMS parameter EDMS_DOCUMENT_SIZE_MAX to equal 1000MB as follows.

1. Log in to Civic Platform.
2. Click the main link for Civic Platform administration.
3. Click **Agency Profile > Standard Choices**.
4. Search for the existing Standard Choice by entering **EDMS** in the **Standard Choices Item Name** field.
5. Click **Submit**.
6. Click the red dot to the left of **EDMS**.
7. In **Value Desc**, modify the value of EDMS_DOCUMENT_SIZE_MAX parameter to equal 1000MB.

Configuring Third Party Plan Review Integration

This topic pertains to Civic Platform's e-PlanCheck integration, referred to as "third party plan review integration" throughout.

- [Preparation](#)
- [Mapping Data for Third Party Document Review](#)
- [Preparing Document Types](#)
- [Other Admin Configuration](#)

Preparation

Before proceeding with the configuration to enable third party plan review integration, agencies must do the following:

- Configure a Civic Platform user account for third party use.
- Include all permissions for the user account that are needed to complete a document review task, such as review status update and check-in.
- Designate an API account for the third party application. This account will be dedicated for API calls. Make note of the account name/password, and the web application URL.
- Configure the following standard choices: EXTERNAL_DOC REVIEW (used to define connectivity and authentication of the third party plan review tool, as well as enable the mapping portlet for the named plan review tool), and EXTERNAL REVIEWERS (used to accommodate plan reviewers who are not Civic Platform users).

Use this Civic Platform user account information along with the URL for the Civic Platform API to configure the connection to Civic Platform in the third party software. Refer to the third party software documentation for more information.

Mapping Data for Third Party Document Review

To integrate the Civic Platform with a third party document review tool such as EPC or e-PlanCheck, agency administrators need to map Civic Platform fields to the third party document review fields. A data mapping tool is available to help you do that. After you configure the standard choice EXTERNAL_DOC REVIEW, this data mapping tool is enabled.

Topics

- [Accessing the Third Party Mapping Tool](#)
- [Mapping Record Types](#)
- [Mapping Record Statuses](#)
- [Mapping Departments](#)
- [Mapping Construction Types](#)
- [Mapping Contact Types](#)

Accessing the Third Party Mapping Tool

Configure the standard choice EXTERNAL_DOC REVIEW to make this tool available in the Administration portlet.

1. Open the Civic Platform Administration tool.
2. In the Setup panel, select **Document > 3rd Party Integration**.

Mapping Record Types

Use the record type mapping tab on the 3rd-Party Integration portlet to map Civic Platform record types to key fields in the third party review tool, such that the sum of the fields is equivalent to the Civic Platform record type.

Example: Map the Civic Platform record type “Building/Commercial/New Building/With Plans” to ePlanSoft (EPC) field values for Project Type=New Building, Permit Type=With Plans, and Occupancy=Business. When a plan is assigned for review in Civic Platform, the Civic Platform record type displays. When the same plan is opened in EPC, the field values for Project Type, Permit Type, and Occupancy display as you mapped.



Note:

When mapping values between Civic Platform and EPC, note that EPC permit type options display as string values rather than as the associated labels for each value. This is because the Create Permit EPC API accepts the EPC Permit Type string value, not its key, as the required parameter. Other EPC field values display label values.

To map record types

1. Access the third party mapping tool (see [Accessing the Third Party Mapping Tool](#)).
2. Select the Record Type Mapping tab.
3. Click **New**.

The record type mapping form displays.

Record Type *

3rd-party Project Type (PK) * 3rd-party Permit Type (PK) * 3rd-party Occupancy (PK) *

Add New Add New -Select--

4. Select the Civic Platform record type you want to map.

A record type picker is available to the right of the Record Type field. Use it to locate and select a record type.

5. For each of the following fields in the third party tool, select a value such that, when the three are combined, they form an equivalent value to the selected Civic Platform record type. If none of the defined project or permit types on EPC properly map to the selected Civic Platform record type, select **Add New** to add new project or permit type values on EPC.

3rd-party Project Type	Type of project, such as Commercial or Residential. If you add a new 'Project Type' value (select Add New), Civic Platform uses the subtype string value for the selected Civic Platform record type as the new 'Project Type' value to add to EPC.
3rd-party Permit Type	Type of permit being requested, such as Deck or Roof. If you add a new 'Permit Type' value (select Add New), Civic Platform uses the category string value for the selected Civic Platform record type as the new 'Permit Type' value to add to EPC.
3rd-party Occupancy	Use of building, such as Factory/Industrial or Residential.

6. Click **Submit**.

Mapping Record Statuses

Use the record status mapping tab on the 3rd-party Integration portlet to map Civic Platform record status to equivalent status values in the third party review tool.

To map record statuses

1. Access the third party mapping tool (see [Accessing the Third Party Mapping Tool](#)).
2. Select the Record Type Mapping tab.
3. Select an existing record type mapping from the list.
The mapping page displays for the selected record type mapping.
4. Select the Record Status Mapping tab.
5. Click **New**.
A blank row is added to the record status mapping list.

Record Type Mapping:Building/Commercial/New Building/With Plans

Submit New Delete Help

Record Type Mapping Record Status Mapping

<input type="checkbox"/> Record Status *	3rd-party Permit Status Type *
<input type="checkbox"/> Application Accepted	Open
<input type="checkbox"/> --Select--	--Select--

6. Select a Civic Platform record status value from the drop-down list on the left.
7. Select a corresponding third party permit status type value from the drop-down list on the right.
8. Click **Submit**.
9. To map an additional record status, click **New** and repeat this process.

Mapping Departments

Use the department mapping tab on the 3rd-party Integration portlet to map Civic Platform department names to equivalent department values in the third party review tool.

To map departments

1. Access the third party mapping tool (see [Accessing the Third Party Mapping Tool](#)).
2. Select the Department Mapping tab.
3. Click **Add**.

A blank row is added to the department mapping list.

3rd-party ListItem Mapping

Submit Add Delete Help

Record Type Mapping Department Mapping Construction Type Mapping Contact Type Mapping

<input type="checkbox"/> Department *	3rd-party department (PK)
<input type="checkbox"/> Building Department	Building(13)
<input type="checkbox"/> Planning Department	Planning(215)
<input type="checkbox"/> --Select--	Add New

4. Select a Civic Platform department value from the drop-down list on the left.
5. Select a corresponding third party department value from the drop-down list on the right, OR Select **Add New** to automatically add the Civic Platform department string value to EPC.



Note:

The **Add New** option enables agencies to automatically build the same department structure on EPC as exists on Civic Platform without having to manually input the departments separately in EPC

**Note:**

Agencies should ensure that the department defined in the EPC user profile is the same one that maps to the department to which the mapping AA user belongs. If the User ID and Department values are not consistently defined, review task assignments will return an error

6. Click **Submit**.
7. To map an additional department, click **Add** and repeat this process.

Mapping Construction Types

Use the construction type mapping tab to map Civic Platform construction type values to equivalent construction type values in the third party review tool.

To map construction types

1. Access the third party mapping tool (see [Accessing the Third Party Mapping Tool](#)).
2. Select the Construction Type Mapping tab.
3. Click **Add**.

A blank row is added to the construction type mapping list.

Construction Type *		3rd-party Const Type (PK)
<input type="checkbox"/> 101-Single Family Houses Detached	<input type="checkbox"/> -Select--	<input type="checkbox"/> Type I-A(206)
		<input type="button" value="Add New"/>

4. Select a Civic Platform construction type value from the drop-down list on the left.
5. Select a corresponding third party construction type value from the drop-down list on the right, OR Select **Add New** to automatically add the Civic Platform construction type string value to EPC.

**Note:**

The **Add New** option enables agencies to automatically build the same construction types on EPC as exist on Civic Platform without having to manually input the departments separately in EPC

6. Click **Submit**.
7. To map an additional construction type, click Add and repeat this process.

Mapping Contact Types

Use the contact type mapping tab to map Civic Platform contact type values to equivalent contact type values in the third party review tool.

To map contact types

1. Access the third party mapping tool (see [Accessing the Third Party Mapping Tool](#)).
2. Select the Contact Type Mapping tab.

3. Click Add.

A blank row is added to the contact type mapping list.

The screenshot shows a web-based configuration tool titled '3rd-party ListItem Mapping'. At the top, there are buttons for 'Submit', 'Add', 'Delete', and 'Help'. Below these are tabs for 'Record Type Mapping', 'Department Mapping', 'Construction Type Mapping', and 'Contact Type Mapping', with 'Contact Type Mapping' being the active tab. A form section is displayed with a label 'Contact Type *' followed by a dropdown menu containing '-Select--'. To the right of this is another dropdown labeled '3rd-party Contact Roles (PK)' with the option 'Add New' highlighted. The entire row is highlighted with a yellow background.

4. Select a Civic Platform contact type value from the drop-down list on the left.

- 5. Select a corresponding third party contact type value from the drop-down list on the right, OR
Select **Add New** to automatically add the Civic Platform contact type string value to EPC.**



Note:

The **Add New** option enables agencies to automatically build the same contact types on EPC as exist on Civic Platform without having to manually input them separately in EPC

6. Click **Submit.**

7. To map an additional contact type, click **Add and repeat this process.**

Preparing Document Types

Agencies need to confirm that the document types are properly configured for third party integration. Agencies should ensure that the following are in place:

- If your agency is using EPC as your third party plan review tool, create a document type called Plan in Civic Platform. Agency users must use this new document type, Plan, for any document or plan to be reviewed in EPC. As you configure the Plan document type, be sure to configure the Document Status Group and Review Status Group for the new document type.
- For both the Plan and Correction Notice Report document types, you need to ensure that public access via the Citizen Access is enabled. Do this by choosing **Yes** for the 'Set Permission for ACA' option for each document type.

Other Admin Configuration

Agencies need to:

- Confirm that Street Type values (for example, Ave or Blvd) match on both Civic Platform and on the third party document review tool. In Civic Platform, street types are configured in the STREET_SUFFIXES standard choice.

Creating Custom Fields

Custom Fields are agency-defined fields that you create and display on records in Civic Platform, based on the specific needs of your agency. To reuse the same Custom Fields in various record types, you can create Custom Fields Groups and Subgroups. These Custom Fields Groups and Subgroups enable you to design application intake forms for specific types of records, such as building permits, zoning applications, or enforcement complaints. Citizens can then fill in these custom fields when they apply for permits, fill out complaint forms, and submit zoning applications. You choose the order in which the fields display and specify other information as well.

You can globally change Custom Fields Groups for applications already existing in your Accela system, regardless of the application's status. This includes completed applications, applications that are moving through a workflow, or partially completed applications submitted through Citizen Access. You can define the processes surrounding what happens when you create or modify Custom Fields and how those changes impact existing applications.

Certain components of Citizen Access user interface can be customized using Custom Fields. You can display pop-up windows, write instructional text, customize the text and size of labels, change page flows and their display order, and add watermarks. You do this by configuring the Citizen Access sections of Custom Fields Groups and Subgroups.

Click a topic title below for full details.

Related Information

- [Working with Custom Fields Groups and Subgroups](#)
- [Auto Filling Custom Fields with GIS Object Attribute Values](#)
- [Designing Custom Fields Layouts for Citizen Access](#)
- [Working with Custom Fields Groups](#)
- [Custom Fields Lookup Tables](#)

Working with Custom Fields Groups and Subgroups

When you create a new Custom Fields Group, you specify the group code, the name, and the first field to include in the group. Then you set up other information about the field, including the field type and a default value. You can then create additional fields, change the order of fields in the group, and change any field values. When you add new fields to a Custom Fields Group, you have the option to include the newly added fields to existing records.

Click a topic for full details:

- [Creating a New Custom Fields Group or Subgroup](#)
- [Searching for a Custom Fields Group](#)
- [Working with Custom Fields Subgroups](#)

Creating a New Custom Fields Group or Subgroup

1. Go to **Administration > Setup Portlet > AA Admin**.
2. Expand the appropriate module, then click the link for the record type you want to work with.
3. Click **Other Associations**.

4. Click or scroll to the **Custom Fields Group** section.

5. Click **Create New Custom Fields Group**.

Civic Platform displays the Custom Fields Group – Add page.

Custom Fields Group - Add

Custom Fields Group Code *:

Custom Fields Subgroup *:

Custom Lists Group:

Group Display Order:

1st Field Label *:

Field Label Alias:

Field Type *:

Display Order *:

Default Value:

Unit: **or New Unit:**

Fee Indicator:

Required Flag: Yes No

Req for Fee Calc: Yes No

Supervisor Edit Only: Yes No

Searchable Flag: Yes No

Max Len:

Display Len:

ACA Displayable: Yes Hidden No

ACA Searchable: Yes No

Justification:

Default APO GIS Layer:

Location Query: Yes No

Status: Enable Disable

Submit **Cancel**

6. Complete the fields that display. For a description of the fields, see [Table 51: Fields you can modify in a Custom Fields Group](#).

7. Click **Submit**.

Searching for a Custom Fields Group

To view or edit an existing Custom Fields Group, you must first locate the group you want to work with.

1. Go to Classic Administration ([Accessing Classic Administration](#)) and click the Admin Tools tab.
2. Select **Application > Custom Fields**. The Custom Fields Search page displays.
3. To see a list of all groups, click **Submit** without entering details.
4. To find a specific group, enter the Custom Fields Group Code and/or Subgroup Code, then click **Submit**.

Custom Fields - Browse

Use this form to select an Custom Fields Group.
(Click the below to select.)

Custom Fields Group Code	Subgroups	ACA Configuration	Security
1-FENCE	1-FENCE	ACA Configuration	Security
10ACC-05942	MAT	ACA Configuration	Security
ABANDVEHICAL	GENERAL, SPECS, WATER HEATER/PLUMBING INFO	ACA Configuration	Security
ABELTEST	ABEL1	ACA Configuration	Security
ACA_DEMO	ACA_SUB_DEMO, ACA_NO_DRILL-DOWNS	ACA Configuration	Security
AD1	SPECS	ACA Configuration	Security
AVIR ASI	AVIR ASI SUBGROUP	ACA Configuration	Security
ALAN	ALAN, 1-FENCE, ASI_DRILLDOWN	ACA Configuration	Security
AMOL'S ASI	AMOL'S SPECS	ACA Configuration	Security
AMY_MAT	AMY_MAT_SUB	ACA Configuration	Security

◀ Pages: 1 2 3 4 5 6 7 8 9 10 ... ▶

Search

or

Add

- Click the red dot next to the group you want to work with.

Civic Platform displays the Custom Fields — Edit and Manage Subgroups page.

Working with Custom Fields Subgroups

Each Custom Fields Subgroup represents a group of fields on a section of an application intake form. For example, you will want to display general information fields at the top of the application intake form, and then display specific fields in discreet sections that comprise the rest of the form. For each of those sections, you'll want to create a separate supgroup.

For your Citizen Access website, you can design the layout of fields and instructional text via the ACA Configuration button on the Custom Fields subgroup page. For more information, see [Designing Custom Fields Layouts for Citizen Access](#).

Topics

- [Changing the Display Order of a Subgroup](#)
- [Deleting a Subgroup from a Group Code](#)
- [Creating a New Subgroup Within a Custom Fields Group](#)
- [Adding an Existing Subgroup to a Custom Fields Group](#)
- [Editing a Subgroup](#)

Changing the Display Order of a Subgroup

You can change the positioning of where a group of fields displays on an application intake form.

To change the display order of a subgroup

- Locate the Custom Fields Group you want to work with. For instructions, see [Searching for a Custom Fields Group](#).

Civic Platform displays the Custom Fields — Edit and Manage Subgroups page.

- Enter the display order in the **Display Order** field. For example, if you want the subgroup to display first on the application intake form, enter 1.

3. If you want to change order in which the fields display within a subgroup, click the red dot next to the subgroup you want to modify.
Civic Platform displays the Custom Fields page.
4. In the **Display Order** field, enter the number that represents the field's position on the form relative to the other fields on the form.
5. Click **Update**.
Civic Platform updates the display information.

Deleting a Subgroup from a Group Code

If you no longer need a subgroup associated with an application specific information group code, you can remove the subgroup.

To delete a subgroup from a group code

1. Locate the Custom Fields Group you want to work with. For instructions, see [Searching for a Custom Fields Group](#).
2. Select the **Delete** option next to each subgroup you want to remove.
3. Click **Submit**.

Creating a New Subgroup Within a Custom Fields Group

To create a new subgroup within a Custom Fields Group

1. Locate the Custom Fields Group you want to work with. For instructions, see [Searching for a Custom Fields Group](#).
2. Click **New**.
Civic Platform displays the Custom Fields Group—Add page.
3. Complete the fields that display. For a description of the fields, see [Table 51: Fields you can modify in a Custom Fields Group](#).
4. Click **Submit**.
Civic Platform adds the new subgroup, and then displays the Custom Fields page.

Adding an Existing Subgroup to a Custom Fields Group

To add an existing subgroup to a Custom Fields Group

1. Locate the Custom Fields Group you want to work with. For instructions, see [Searching for a Custom Fields Group](#).
2. Click **Add**.
Civic Platform displays the Custom Fields Group Code — Add page.
3. Select the **Group Code** containing the existing subgroup you want to add.
Civic Platform displays all of the subgroups associated with the group code you selected.
4. In the **Subgroups** field, select the subgroup you want to add.
5. Click **Add**.
Civic Platform adds the selected subgroup to the group code you are working with.

6. Click Update.

Editing a Subgroup

After you create a Custom Fields Group, you might need to update a subgroup within the group. You can apply any changes you make to all subgroups. For information about applying or updating user access security permissions to a subgroup, see [Setting Up Security Policies](#).

To edit a subgroup

1. Search for the Custom Fields Group with the subgroup that you want to edit. For instructions, see [Searching for a Custom Fields Group](#).
2. Click the red dot next to the subgroup that you want to edit.

Civic Platform displays the Custom Fields Group page.

Field Label (Default)	Field Label	Type	Display Order	Fee Indicator	Unit	Default Value	Required	Req for Fee Calc Only	Supervisor	Searchable	Max Len	Display	ACA Displayable	ACA Searchable	Justification Status	ACA Configuration
Bathrooms	Bathrooms	Text	1			2	Yes	No	No	No		No	No	Yes	No	ACA Configuration
Electrical	Electrical	DropdownList	4				No	No	No	No		No	No	No	ACA Configuration	
Notes	Notes	Textarea	5				No	No	No	No		No	No	No	ACA Configuration	

Buttons at the bottom: [Update](#), [Add](#), [Cancel](#).

3. Select whether to apply changes to this subgroup only or to all subgroups.
4. Update the fields that display. For a description of the fields, see [Table 51: Fields you can modify in a Custom Fields Group](#).
5. Click **Update**.

Table 51: Fields you can modify in a Custom Fields Group

ACA Configuration	If your agency implements Citizen Access, click the ACA Configuration button, then design the Citizen Access form display for the group. For more information, see Designing Custom Fields Layouts for Citizen Access .
ACA Displayable	<p>This option controls the ability for citizens to view Custom Fields in Citizen Access. For example, you can specify whether or not a citizen can view the property frontage information on a planning application.</p> <p>Select Yes to give users full or read-only access to Custom Fields in Citizen Access, then set the Custom Fields Security (Setting Up Security Policies) to full or read-only.</p> <p>Select No to hide the Custom Fields in Citizen Access. Use the Hidden option for expressions when the value from a field not displayed on the form becomes updated by the expression or the expression criteria uses the value.</p>

ACA Searchable	<p>This option controls the ability for citizens to search for Custom Fields in Citizen Access. For example, citizens can search for the property frontage information on a planning application.</p> <p>Select Yes to allow users to search on Custom Fields in Citizen Access. Select No to hide the Custom Fields on the search form.</p> <p>There are four combinations of settings for the ACA Displayable and ACA Searchable options:</p> <ul style="list-style-type: none"> If you select Yes for both options, the Custom Field displays and is available for use in the search form. If you select Yes for ACA Displayable, but No for ACA Searchable, the Custom Field displays as read only in the search form. If you select No for ACA Displayable and Yes for ACA Searchable, the Custom Field does not display in the search form. This is not best practice. If you do not want the field to display in the search form, select No for both options.
Alternative ACA Label	<p>Enter a custom field label to display to public users on web pages in Citizen Access, to enable the agency to ask questions to an applicant during the application intake process online. For example, you can change a field label from “Criminal History” to “Have you or any member of your immediate family, including spouse, children, parents, or siblings been convicted of a crime?” This field is available only when you are adding a field to a Custom Fields subgroup.</p>
Custom Fields Group	<p>Enter a unique code to identify the Custom Fields Group that you are creating. If you are creating a subgroup for an existing group code, Civic Platform automatically populates this field with the group code that you are working with.</p> <p>This field is read-only when you are editing a subgroup or adding a field to a Custom Fields Group.</p>
Custom Fields Subgroup	<p>Enter the name of the Custom Fields subgroup you are creating.</p> <p>This field is read-only when are editing a subgroup.</p>
Custom Fields Subgroup Alias	<p>Enter a subgroup alias. The alias replaces the subgroup name in all areas that the Custom Fields subgroup displays to users in Civic Platform, Citizen Access, and Mobile Office.</p>
Custom List	<p>Choose a Custom Lists Group. You must create the Custom Lists Group before you can choose it. For more information, see Working with Custom Lists.</p>
Apply changes to all subgroups	<p>Choose this option if multiple groups contain the subgroup and you want to apply the changes to the subgroup in all groups.</p>
Apply changes to this subgroup only	<p>Choose this option if multiple groups contain the subgroup and you just want to apply the changes to the subgroup in current group.</p>
Default Value	<p>Enter a default value for the field. If you are adding a Custom Fields Group, this field defines the default value for the first field in your subgroup.</p> <p> Note: If you are setting up a drop-down list, you can add values to the drop-down list so that a user can choose between multiple values. For instructions, see Setting or Editing Drop-Down List Field Values.</p>
Display Len	Specify the maximum number of characters that Civic Platform displays.
Display New Custom Field on Existing Contacts	Select Yes to apply the new Custom Field to existing contacts. Select No to apply the new Custom Field to new contacts only.

Display New Custom Field on Existing Records	Select Yes to apply the new Custom Field to existing applications. Select No to apply the new Custom Field to new applications only. If you cannot see the option, you must configure the related Standard Choice. Refer to the Accela Civic Platform Configuration Reference for additional information.
Display new Custom Field on existing Education/Examination/Continuing Education	Choose Yes to make the new user-defined field, table, or sub-group of user-defined fields available to existing education, examination and/or continuing education records in addition to being available for new records. Choose No to apply the new user-defined objects to new records only.
Display Order	Enter a number to determine the position of the field in a subgroup. If you are adding a Custom Fields Group, this field determines the position of the first field in your subgroup. For example, to display the field before any other fields, enter 1.
Fee Indicator	To use the field value in fee calculations, enter the unique 5-digit code that you use to identify this variable in a fee formula. You must use a value between 10100 and 10599 and use the format displayed: \$fixxxxx\$ For example, enter \$fi10101\$
Field Type (or Type)	Choose the type of field. If you are adding a Custom Fields Group, this field defines the type of the first field in your subgroup. For more information on field types, see Adding a Field to a Custom Fields Group . If the field type is a drop-down list, click Edit to update, add, or delete values from the drop-down list. For instructions, see Setting or Editing Drop-Down List Field Values .
Field Label (or 1st Field Label)	Enter the label of the field. If you are adding a Custom Fields Group, this field defines the label for the first field in your subgroup. For example, if you want to prompt end-users to specify a date, enter the word Date.
Group Display Order	Enter a number to specify the position of this Custom Fields Group on ab application. For example, if you want this a Custom Fields Group to display in the second position, enter 2.
Justification	Use the drop-down list to determine the justification of the field value. If you display Citizen Access in a Cyrillic font, which reads from the right side of the page to the left, you can specify a text justification that takes into consideration the font direction. The default setting uses left-alignment. If you cannot see any options, you must configure the related Standard Choice. For more information about the justification, see "Setting Custom Field to Right Justification" in the <i>Internationalization Installation and Administrator Guide</i> .
Location Query	Select Yes to support populating the Custom Fields with the map data from multiple GIS layers. Select No to allow populating the Custom Fields only with the map data from the layer where the selected GIS object lies.
Max Len	Specify the maximum number of characters that the field accepts.
Req for Fee Calc	To require users to complete the Fee Calculation fields, click Yes or choose Yes from the drop-down list. Fields required for Fee Calculation display a visual indicator (\$) on an application form. You must configure FID 0242 Required for Fee Calculation to enable this feature.
Required Flag (or Required)	To require users to enter a value in this field, click Yes or choose Yes from the drop-down list.
Searchable Flag (or Searchable)	To let users search for applications based on this field, click Yes or choose Yes from the drop-down list.
Status	To let users see this group or this field in Civic Platform, click Enable or choose Enabled from the drop-down list; otherwise, click Disable or choose Disabled.

Supervisor Edit Only	Select Yes or choose Yes from the drop-down list to make this information read-only to non-supervisor users after a user creates an application. For instructions, see Limiting Custom Field and Custom List Editing Rights to Supervisors Only .
Unit or New Unit	Enter any desired unit such as square feet, dollars, or miles that you want to attach to the field value. Choose from Standard Choices, or enter a new unit.  Note: If you are editing Custom Fields subgroup, you cannot enter a new unit.

Auto Filling Custom Fields with GIS Data

Civic Platform can automatically populate Custom Fields in an application intake form with GIS object attribute values when a user attaches a GIS object to the application intake form. GIS objects may represent assets or parcels on the map.

- [Enabling Custom Fields Auto-Filling](#)

Enabling Custom Fields Auto-Filling

To enable Custom Fields auto filling in Civic Platform

1. Create a mapping relationship where attributes of GIS objects on the various map layers are mapped to specific Custom Fields.
For instructions, see “Creating Attribute Mapping” in the Configuring Civic Platform section of the *Accela Civic Platform GIS Administrator Guide*.
2. If you want to automatically populate Custom Fields with attribute values of the GIS object that represents an asset, map each asset in Civic Platform to a GIS object in the legacy Accela GIS.
Skip this step if you only need to automatically populate Custom Fields with attribute values of the GIS object that represents a parcel.
For instructions, see [Asset Types](#).
3. Make sure that the record contains the Custom Fields for which you have created attribute mapping by associating the record type with the Custom Fields group code.
4. Do any of the following:
 - Launch the map viewer from the main console or the Record list portlet, select a GIS object that represents an existing asset in the Civic Platform database, and click Create New Record, Create Single Work Order, or Create Multiple Work Orders.
 - Look up an existing parcel that you can plot on the map and add it to the Parcel section.
 - Launch the map viewer from the Parcel section, select a GIS object that represents an existing parcel in the Civic Platform database, and click Send GIS Features.
 - Look up an existing asset that you can plot on the map and add it to the Asset section.
 - Launch the map viewer from the Asset section, select a GIS object that represents an existing asset in the Civic Platform database, and click Link Object to Work Order.
 - Launch the map viewer from the Associated GIS Features section, select a GIS object that either represents an existing parcel or asset, and click Send GIS Features.

**Note:**

If you attach multiple parcels, assets, or associated GIS features to a record all at once, a dialog box prompts you to set one item as primary. The Custom Fields get the corresponding values from the attributes of the primary GIS object.

Civic Platform uses the attributes from the GIS object in the new application form.

Designing Custom Fields Layouts for Citizen Access

If your agency provides Citizen Access, you can customize the layout and display of Custom Fields on your Citizen Access page. You can design instructional text, labels, field arrangements, page flow configuration, display order, and you can add watermarks. You can configure this through the Citizen Access configuration section of the Custom Fields group and subgroup. For additional information on how to design a form layout for Citizen Access, refer to the “Working with Web Pages” chapter in the *Citizen Access Administrator Guide*.

Topics

- [Defining Custom Fields Layouts for Citizen Access](#)
- [Customizing Fields for Citizen Access](#)

Defining Custom Fields Layouts for Citizen Access

Custom Fields Layouts provide the ability to define online form displays in Citizen Access. For example, you can set the display order in a page flow, add instructional text, and design layouts for labels and columns.

**Note:**

When you hide Custom Fields using expressions on a page for a subgroup, Citizen Access re-aligns the displayable fields appropriately. There is no indication of a missing or hidden field.

To design a layout for Citizen Access

1. Locate the Custom Fields groups and subgroups that you want to design for Citizen Access. For instructions, see [Searching for a Custom Fields Group](#).
Civic Platform displays the group and subgroup information.
2. Click **ACA Configuration** next to the group or subgroup requiring layout configuration.
Civic Platform displays the Layout Configuration pop-up page.

The screenshot shows a Windows-style dialog box titled "Accela Automation: Add Layout Configuration - Windows Intern...". The main title bar says "Application Specific Info Subgroup - Edit ACA Configurations". Inside, there's a section for "Subgroup ALICE" with a "Name:" label and a dropdown menu showing "ALICE". Below it are three dropdown menus: "Label Display", "Column Arrangement", and "Column Layout", each with a small preview window. At the bottom is a large text area labeled "Instructions:". At the very bottom of the dialog are two buttons: "Save" and "Cancel".

3. Complete the fields as described in [Table 52: Custom Fields Group and Subgroup Layout Configuration Fields](#).
4. Click **Save**.

Table 52: Custom Fields Group and Subgroup Layout Configuration Fields

Column Arrangement	This field becomes active when you choose to provide the Custom Fields group information in a two column layout. Use the drop-down menu to define how you want to display the subgroup information. Choices are vertical and horizontal. Choose Vertical if you want information to display down the page first, then to flow to the next column. Choose Horizontal if you want information to flow across the page horizontally, row by row.
	 Note: This setting only applies to the application page flow, and does not apply to the Record Detail page and Record Review page.
Column Layout	Use the drop-down field to set how the fields display in a column. Choose single column layout or two-column layout for Custom Fields subgroup fields in the application page flow, the Record Detail page, and the Record Review page in Citizen Access.
Field Arrangement	This field is active when you choose to provide the Custom Fields subgroup fields in a two-column layout. Use this drop down list to determine if the fields display from left to right or top to bottom arrangements. For example, if you number the fields 1-6, fields 1, 3, and 5 display in the left column; fields 2, 4, and 6 display in the right column for left to right alignment. In the top to bottom arrangement, fields 1,2, & 3 in left column and 4, 5, and 6 in right column.
Instructions	Use this text field to enter any accompanying instructional text for the group or subgroup. This field supports embedded hyperlink functionality.
Label Display	Specify where you want to position the field label in relation to the field. Choose Top for the label display to be above the field. Choose Left to have the label to the left of the field.
	 Note: This setting only applies to the application page flow, and does not apply to the Record Detail page and Record Review page.
Page Index	This configuration determines if the information displays on one or more pages in a pageflow in Citizen Access. Set the display order for Custom Fields subgroup information in pageflows by entering a number in the Page Index field. For example, if all subgroups have a Page Index number of 1, then all the subgroups display on one page in Citizen Access. If you want the subgroups split up onto different pages, enter the appropriate number for each subgroup page a configured sequence. For example, 2 indicates a second page, 3 indicates a third page, and so forth.

Customizing Fields for Citizen Access

Use the Citizen Access Configuration page to define the field labels, provide instructional text, or create watermarks for Custom Fields. This section provides details to help you to customize fields for Citizen Access. For more information on how to customize fields for Citizen Access, refer to the “Working with Web Pages” chapter in the *Citizen Access Administrator Guide*.

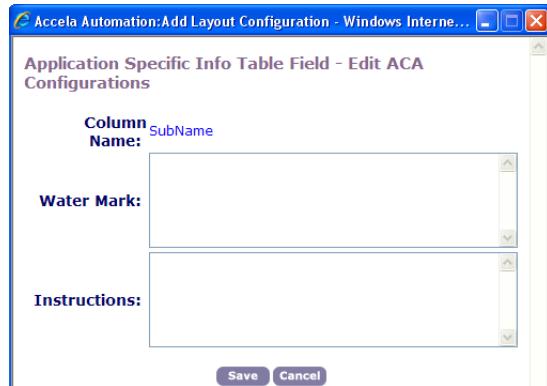


Note:

When you hide Custom Fields, Citizen Access re-aligns the displayable fields appropriately. There is no indication of a missing or hidden field.

To customize Custom Fields for Citizen Access

1. Navigate to the Custom Fields or Custom Lists subgroup that contains the fields that require customization.
Civic Platform displays the Custom Fields page.
2. Click **ACA Configuration** next to the field requiring customization.
Civic Platform displays the Citizen Access Configuration page.



3. Complete the fields as described below:

Alternative ACA Label	Provide a custom label for the field in this here.
Instruction	Enter any instructional text to indicate the data you are trying to collect in this field.
Watermark	Enter sample text for how the user is to complete the field. This information displays in a faint watermark in the text field.

4. Click **Submit**.

Working with Custom Fields Groups

Topics

- [Adding a Field to a Custom Fields Group](#)
- [Editing a Field in a Custom Fields Group](#)
- [Deleting a Field from a Custom Fields Group](#)
- [Setting or Editing Drop-Down List Field Values](#)
- [Applying Shared Drop-down Lists](#)
- [Mapping a Field to a Session or SQL-Defined Variable](#)
- [Working with Custom Lists](#)
- [Deleting Custom List Subgroups and Columns](#)
- [Configuring Custom Field and List Drill-downs](#)
- [Limiting Custom Field and Custom List Editing Rights to Supervisors Only](#)

- Configuring the Record Detail Audit Log

Adding a Field to a Custom Fields Group

You can add any number of fields to a Custom Fields Group. The fields you add to a Custom Fields Group become available in the Custom Fields Form Layout Editor. You can also specify whether to display a newly-added field on existing records.

Once you've added the Custom Field to a group, you can add it to a form, using the Custom Fields Form Layout Editor. These are the field types that are supported in the Custom Fields Form Layout Editor:

- Number Field:** Lets users enter only numeric characters in a number field. A number field displays the word "number" to the right of the field.
- Text Field:** Lets users enter only text characters in a text field. A text field displays the word "text" to the right of the field.
- Text Area:** Lets users enter multiple lines of text, such as a three-line address.
- Date Button:** Lets users search for a date rather than entering a date manually.
- Yes/No Option Buttons:** Lets users select either a Yes or No value by selecting the option.
- Drop-down List:** Lets users choose a value from a list of predefined values determined by your agency.
- Time:** Lets users enter a time value.
- Money:** Lets users enter a dollar amount.
- Check box:** Lets users click a check box to select the option.

To add a field to a Custom Fields Group

1. Locate the Custom Fields Group to which you want to add a subgroup.

2. Click **Add**.

Civic Platform displays the Custom Fields Group Code—Add page.

3. Select the **Group Code** containing the existing subgroup you want to add.

Civic Platform displays all of the subgroups associated with the group code you selected.

4. In the **Subgroups** field, select the subgroup to which you want to add a field.

Civic Platform displays the Custom Fields page.

The screenshot shows a table titled 'Application Specific Info' with various columns for configuring fields. The table includes rows for Text, Date, Radio, Number, Dropdown, TextArea, Time, Money, and checkBox field types. The 'Dropdown' row is highlighted with a red border. The table has columns for 'Field Label', 'Type', 'Display Order', 'Fee Indicator', 'Unit', 'Default Value Required', 'Req for Supervisor', 'Fee Calc Edit Only', 'Searchable', 'Max Len', 'Display Len', 'Len ACA', 'Displayable ACA', 'Searchable Justification', 'Status', and 'ACA Configuration'. At the bottom of the table, there are buttons for 'Update', 'Add', and 'Cancel'.

Field Label	Type	Display Order	Fee Indicator	Unit	Default Value Required	Req for Supervisor	Fee Calc Edit Only	Searchable	Max Len	Display Len	Len ACA	Displayable ACA	Searchable Justification	Status	ACA Configuration	Action
Text	Text	1			No	Yes		No			No	Enabled	ACA Configuration	Security Delete Variable Mapping		
Date	Date	2			No	No	Yes	No			No	Enabled	ACA Configuration	Security Delete		
Radio	YN	3			No	No	Yes	No			No	Enabled	ACA Configuration	Security Delete		
Number	Number	4			Yes	No	No	Yes			No	Enabled	ACA Configuration	Security Delete		
Dropdown	dropdownList	5			No	No	Yes	No			No	Enabled	ACA Configuration	Security Delete Edit		
TextArea	Textarea	6			No	No	Yes	No			No	Enabled	ACA Configuration	Security Delete Variable Mapping		
Time	Time	7			No	No	Yes	No			No	Enabled	ACA Configuration	Security Delete		
Money	Money	8			Yes	No	No	No			No	Enabled	ACA Configuration	Security Delete		
checkbox	CheckBox	9			No	No	No	No			No	Enabled	ACA Configuration	Security Delete		
Test Add ASI Item	Text	11			Test Add ASI	No	No	No	Yes		No	Enabled	ACA Configuration	Security Delete Variable Mapping		

5. Click **Add**.

Civic Platform displays the Custom Fields Field—Add page.

6. Complete the fields that display. For a description of the fields, see [Table 51: Fields you can modify in a Custom Fields Group](#).
7. Click **Submit**.

Editing a Field in a Custom Fields Group

After you create a Custom Fields Group, you might need to change it. You can add or delete fields, or change the field type, its display order, and its default value. However, you cannot change the group code, the group name, or the field labels when you edit the group. Changing a field label requires that you delete the field and add it again with the new label.

To edit a Custom Fields Group

1. Locate the Custom Fields group to which you want to add a subgroup. For instructions, see [Searching for a Custom Fields Group](#).
2. Click the red dot next to the subgroup whose field you want to update.

Civic Platform displays the Custom Fields page.

The screenshot shows a table of fields for editing. The columns include: Field Label (Default), Field Label, Type, Display Order, Fee Indicator, Unit, Default Value, Required, Req for Fee Calc Only, Supervisor, Searchable, Max Len, Display Len, ACA Displayable, ACA Searchable, Justification Status, and ACA Configuration. There are three rows of data:

Field Label (Default)	Field Label	Type	Display Order	Fee Indicator	Unit	Default Value	Required	Req for Fee Calc Only	Supervisor	Searchable	Max Len	Display Len	ACA Displayable	ACA Searchable	Justification Status	ACA Configuration	Actions
Bathrooms	Bathrooms	Text	1			2	Yes	No	No	No			No	Yes		Enabled - ACA Configuration	Security Delete Variable Mapping
Electrical	Electrical	DropdownList	4				No	No	No	No			No	No		Enabled - ACA Configuration	Security Delete Edit
Notes	Notes	TextArea	5				No	No	No	No			No	No		Enabled - ACA Configuration	Security Delete Variable Mapping

At the bottom of the table are buttons for **Update**, **Add**, and **Cancel**.

3. Update the information about the field you want to change. For a description of the fields, see [Table 51: Fields you can modify in a Custom Fields Group](#).
4. Do any of the following, as appropriate for your agency's objectives:
 - Click the **Security** button next to the field to apply or update user access security permissions to it. For instructions, see [Setting Permissions for Custom Fields Groups and Custom Lists Groups](#).
 - Click the **Edit** button next to the field of the Drop-down List type to define the options in the drop-down list. For instructions, see [Setting or Editing Drop-Down List Field Values](#).
 - Click the **Variable Mapping** button next to the field of the Text or Text Area type to map the field to a session variable or a SQL-defined variable. For instructions, see [Mapping a Field to a Session or SQL-Defined Variable](#).

Deleting a Field from a Custom Fields Group

If you no longer need a field in a Custom Fields Group, you can delete it.

To delete a field from a Custom Fields Group

1. Locate the Custom Fields group that you want to add a subgroup to. For instructions, see [Searching for a Custom Fields Group](#).
2. Click the red dot next to the subgroup from which you want to delete a field.

Civic Platform displays the Custom Fields page.

Application Specific Info
Use this form to edit Application Specific Info.

Application Spec Info Group Code: ASI-CONTACT
Application Spec Info Subgroup: ASI-CONTACT
Default APO GIS Layer:
Location Query: Yes No
Apply changes to this subgroup only:
Apply changes to all subgroups:

Field Label	Type	Display Order	Fee Indicator	Unit	Default Value Required	Req for Supervisor Fee Calc Only	Searchable	Max Len	Display Len	ACA Displayable	ACA Searchable	Justification	Status	ACA Configuration	Security	Delete	Variable Mapping														
Text	Text	1			No	No	Yes			No	No		Enabled	<input checked="" type="checkbox"/> ACA Configuration	<input type="button" value="Security"/>	<input type="button" value="Delete"/>	<input type="button" value="Variable Mapping"/>														
Date	Date	2			No	No	No			No	No		Enabled	<input checked="" type="checkbox"/> ACA Configuration	<input type="button" value="Security"/>	<input type="button" value="Delete"/>															
Radio	YN	3			No	No	No			No	No		Enabled	<input checked="" type="checkbox"/> ACA Configuration	<input type="button" value="Security"/>	<input type="button" value="Delete"/>															
Number	Number	4			Yes	No	No			No	No		Enabled	<input checked="" type="checkbox"/> ACA Configuration	<input type="button" value="Security"/>	<input type="button" value="Delete"/>															
Dropdown	DropdownList	5			No	No	Yes			No	No		Enabled	<input checked="" type="checkbox"/> ACA Configuration	<input type="button" value="Security"/>	<input type="button" value="Delete"/>	<input type="button" value="Edit"/>														
TextArea	Textarea	6			No	No	No			No	No		Disabled	<input checked="" type="checkbox"/> ACA Configuration	<input type="button" value="Security"/>	<input type="button" value="Delete"/>	<input type="button" value="Variable Mapping"/>														
Time	Time	7			No	No	No			No	No		Enabled	<input checked="" type="checkbox"/> ACA Configuration	<input type="button" value="Security"/>	<input type="button" value="Delete"/>															
Money	Money	8			Yes	No	No			No	No		Enabled	<input checked="" type="checkbox"/> ACA Configuration	<input type="button" value="Security"/>	<input type="button" value="Delete"/>															
checkbox	CheckBox	9			No	No	No			No	No		Enabled	<input checked="" type="checkbox"/> ACA Configuration	<input type="button" value="Security"/>	<input type="button" value="Delete"/>															
Test Add ASI Item															Text	11			Test Add ASI	No	No	No	Yes		No	No	Enabled	<input checked="" type="checkbox"/> ACA Configuration	<input type="button" value="Security"/>	<input type="button" value="Delete"/>	<input type="button" value="Variable Mapping"/>

3. Click **Delete** next to the field that you want to delete.

4. Click **OK**.

Civic Platform deletes the field.

Setting or Editing Drop-Down List Field Values

After you create a Custom Fields Group, you can add fields to the group. If you add drop-down list fields, you must then set the values that you want to include in the list. You can also specify a shared drop-down list, which already has preconfigured values. For information on how to implement shared drop-down lists, see [Applying Shared Drop-down Lists](#).

Users can choose from field values when completing an application. For example, if you add a field to enter contact information, you can provide a drop-down list of contact types. You can also edit existing drop-down list values or delete drop-down values that you no longer use.

To edit drop-down list values

- Locate the Custom Fields Group with the drop-down list whose values you need to set.
- Click the red dot next to the subgroup that contains the field for which you want to set drop-down list values.
- Civic Platform displays the Custom Fields page.
- Click Edit next to the drop-down list you want.
- Civic Platform displays the Custom Fields Drop-down List—Add page.
- Choose one of the following:
 - To add a new value, click **Add**, enter the value in the Item Value field, and then click **Submit**.
 - To update an existing value, replace the value text and then click **Update**.
 - To delete a value, click **Delete**.

Applying Shared Drop-down Lists

After you create a Custom Fields Group, you can add a drop-down field to the group. If you add drop-down list fields, you must then set the values that you want to include in the list. You can implement a shared drop-down list, which already has preconfigured values.

For information on how to create a shared drop-down list, see [Creating Shared Drop-down Lists](#).

To apply a shared drop-down list

- Locate the Custom Fields Group to which you want to apply the shared drop-down list. For instructions, see [Searching for a Custom Fields Group](#).

- Click the red dot next to the subgroup that requires you to configure the drop-down list values.
- Civic Platform displays the Custom Fields page.

The screenshot shows a table of custom fields. The columns include Field Label, Type, Display Order, Fee Indicator Unit, Default Value Required, Req for Supervisor, Searchable Max Len, Display Len, ACA Displayable, ACA Searchable, Justification, Status, and ACA Configuration. A dropdown list entry for 'Dropdown' is highlighted with a red border. The 'Field Label' column contains labels like Text, Date, Radio, Number, Dropdown, TextArea, Time, Money, checkBox, and Test Add ASI Item. The 'Type' column shows various field types: Text, Date, Radio, Number, Dropdown, TextArea, Time, Money, checkBox, and Text. The 'Status' column indicates some fields are disabled (e.g., Money, checkBox). The 'ACA Configuration' column shows checkboxes for ACA Configuration, Security, Delete, and Variable Mapping.

- Click Edit next to this drop-down list you want to modify.
- Civic Platform displays the Custom Fields Drop-down List-Add page.

The screenshot shows the 'Edit Specific Info Item' window with the title 'Application Specific Info DropDown List - Add'. It displays a list of shared drop-down lists: CEO, CFO, Home User, Ship1, Ship2, Ship3, and Ship4. Below the list is a checkbox labeled 'Use Shared Drop Down Lists' which is checked. At the bottom are 'Update' and 'Close' buttons.

- Select the **Use Shared Drop-down Lists** option.
- Do one of the following:
 - Click **Search** to return all shared drop-down lists.
 - Enter the first letter of the drop-down list, or any other search criteria, then click **Search**.

Shared Drop Down List - Browse
Use this form to search for a Shared Drop Down List.

The screenshot shows the 'Shared Drop Down List - Browse' page. It lists shared drop-down lists such as SHARED_OCCUPANCY_2010, SHARED_CONST_TYPE_2010, RULE TYPES, SHARED_CATEGORY_ARCHIVE, SHARED_CATEGORY_COMMERCIAL, SHARED_CATEGORY_DEFERSUB, SHARED_CATEGORY_DEFERSUB_RES, SHARED_CATEGORY_DEMO, SHARED_CATEGORY_HSG_RENTAL, and SHARED_CATEGORY_HSG_RENTAL_RES. Each item has a 'Select' button to its right. Below the list is a navigation bar with buttons for '1 2 3 4' and 'Search' and 'Close' buttons.

- Click **Select** next to the drop-down list you want to apply.

**Note:**

You can only select one shared drop-down list.

Civic Platform returns to the Custom Fields Drop-down List-Add page, and displays the Field Values from the shared drop-down list in blue.

7. Click **Update**.

Mapping a Field to a Session or SQL-Defined Variable

Administrators can map Custom Fields to a session variable or SQL-defined variable. When you use the field as a template field in a report with the Save to EDMS option set to Yes, Civic Platform can retrieve the value of the template field based on the variable mapping for the field. If Civic Platform retrieves a blank field value from session information or SQL query results, or fails to retrieve any value, an alert displays and you must enter the field value manually.

Civic Platform provides you with a set of standard out-of-the-box session variables. This set of variables include frequently used parameters from Civic Platform such as Department, Module, or Service Provider Code. For more information and a list of these session variables, see [Table 53: Session Variables in Variable Mapping](#).

To map a field to a session or SQL-defined variable

1. Locate the Custom Fields Group that you want to work with.
2. Click the red dot next to the desired subgroup.
Civic Platform displays the Custom Fields page.
3. Click the Variable Mapping button next to the Text or Text Area field you want to modify.
Civic Platform displays the Variable Mapping page.

Variable Mapping

Type: **SessionVariable**

Value: SessionVariable
Variable

Submit Cancel

4. To map the Custom Field to a session variable, do the following:

From the Type drop-down list, select **SessionVariable**.

Civic Platform refreshes the Variable Mapping page to display the Value field as a drop-down list.

Variable Mapping

Type: **SessionVariable**

Value: ALTID

Submit Cancel

Select the session variable to which the Custom Field is mapped from the Value drop-down list. For a description of the session variables, see [Table 53: Session Variables in Variable Mapping](#).

5. To map the Custom Field to an SQL variable, do the following:

From the Type drop-down list, select **Variable**.

Enter an SQL statement in the Value field to retrieve the field value at run time.

6. To remove the relationship between the Custom Field and variable, leave the Type and Value fields blank on the Variable Mapping page.

Table 53: Session Variables in Variable Mapping

Variable	Description
ALTIID	Retrieves the alt(ernate) ID from a specific portlet.
AssetNbr	Retrieves the asset sequence number from a specific portlet.
CAPID	Retrieves the alt(ernate) ID from a specific portlet.
CollectionID	Retrieves the public user collection ID.
Department	Retrieves the department of the logged-in user.
DocumentID	Retrieves the document sequence number from a specific portlet.
GAUserID	Retrieves the ID of the logged-in user.
InvoiceBatchNbr	Retrieves the invoice batch number.
InvoiceNbr	Retrieves the invoice sequence number.
Language	Retrieves the language that the logged-in user selected. For example, en_AU (for Australian English) or en_US (for US English).
Module	Retrieves the module name from a specific portlet.
ParcelID	Retrieves the parcel number from the Parcels portlet.
PortletID	Retrieves the portlet ID of a specific portlet.
ProviderNumber	Retrieves the provider number.
PublicUserID	Retrieves the user login ID that a public user generates when they create an account.
ServiceProviderCode	Retrieves the agency code for the logged-in user.
SetID	Retrieves the set ID from a specific portlet.
StateLicNum	Retrieves the official number that identifies the business license issued by the state.
Today	Retrieves today's date. The workstation's system date determines this date.
TransactionID	Retrieves the transaction ID.
TrustAccountReceiptID	Retrieves the trust account receipt number.
UserFullName	Retrieves the logged-in user's full name.
UserGroup	Retrieves the group name of the logged-in user.
UserID	Retrieves the ID of the logged-in user.

Working with Custom Lists

Administrators can set up Custom Lists that enable users to add custom data with zero-to-many relationships. This enables you to store the same data for multiple items. For example, you might want to store the quantity and manufacturer for different types of fixtures, such as bathtubs, sinks, and drains. The Custom List name becomes the label that displays for the user.

A Custom List can have as many data fields with as many individual data types as you require. You can make all of the table data fields available for use during fee calculation and for Event Manager Scripting Engine (EMSE) scripts.

Topics

- [Creating a Custom List](#)
- [Editing a Custom List](#)

Creating a Custom List

Administrators can create new tables to let users add custom data to applications. Custom Field tables can have as many data fields with as many individual data types as you need.

To create a Custom List

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose **Application > Custom Lists**.

Civic Platform displays the Custom Lists – Search window.

3. Click **Add**.

Civic Platform displays the Custom Lists Group – Add page.

Application Specific Info Table Group - Add

Application Spec Info Table Group Code * :	<input type="text" value="Fee List"/>
Application Spec Info Table Subgroup * :	<input type="text" value="Fee Item"/>
Group Display Order:	<input type="text" value=""/>
Column Name * :	<input type="text" value="Fee 1"/>
Type * :	<input type="button" value="DropdownList"/>
Display Order * :	<input type="text" value="1"/>
Default Value:	<input type="text" value=""/>
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 checked="" type="radio"/> Yes <input type="radio"/> No
Searchable Flag:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Display Len:	<input type="text" value=""/>
ACA Displayable:	<input checked="" type="radio"/> Yes <input type="radio"/> Hidden <input type="radio"/> No
Status:	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

4. Complete the fields to define the structure of the Custom List you want to create. For a description of the fields, see [Table 54: Custom List Group Fields](#).
5. Click **Submit** to save the new table group.
6. Select whether to apply changes to this subgroup only or to all subgroups.
7. Make any necessary changes in the subgroup. For a description of the fields, see [Table 54: Custom List Group Fields](#).
8. To delete a subgroup, click **Delete** next to the subgroup you want to delete.



Note: Deleting all subgroups from a Custom List group also deletes the table group.

9. To add an existing subgroup, complete these steps:

- a. Click **Add**.

Civic Platform displays the Custom List Group Code—Add pop up.

- b. Select whether to apply changes to this subgroup only or to all subgroups.
- c. Complete the necessary fields. For a description of the fields, see [Table 54: Custom List Group Fields](#).
- d. Click **Submit**.

10. Click **Update.**

Editing a Custom List

Administrators can edit Custom Lists. You can change the display order, add instructional text, and add or delete subgroups.

To edit a Custom List

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Application > Custom Lists**.
Civic Platform displays the Custom Lists—Search window.
3. Enter relevant search criteria in the Group Code and Subgroup fields and click **Submit**. To browse all tables, click **Submit** without entering any search criteria.
4. Click the red dot beside the Custom List that you want to edit.
Civic Platform displays the Custom Lists—Edit and Manage Subgroups window.

Application Specific Info Table - Edit and Manage Subgroups

Use this form to edit and manage Application Specific Info Table Subgroups.

Application Specific Info Table Group Code: ADM_APPS

Subgroup	Display Order	Disable Sorting
APPLICATION TRACKING	<input type="text" value="1"/>	<input type="checkbox"/>
<input type="button" value="ACA Configuration"/> <input type="button" value="Security"/> <input type="button" value="Delete"/> <input type="button" value="Update"/> <input type="button" value="Add"/> <input type="button" value="New"/>		

5. To change an existing subgroup's display order, enter the number to determine the position in the **Display Order** field and click **Update**.
6. To allow users to sort Custom List fields, clear the **Disable Sorting** check box. To prevent users from using the column sort, select the **Disable Sorting** option.

If you clear Disable Sorting, a sort control arrow displays on the heading of each Custom List column in all applicable locations in Civic Platform. Users can sort a column in the Custom List in ascending or descending order.

Table Subgroup 2 BED 2 BATH

	bathrooms (Number) *	Bedrooms (Number) *	Fireplace (Text)	Garage (Text)
1	2	2	none	none
2	2	2	none	attached 1 car
3	2	2	1	none
4	2	2	1	attached 1 car

7. To add instructional text for a group, click **ACA Configuration**, enter instructional text into the **Instructions** text field, and then click **Save**.
8. To delete a subgroup, click **Delete** next to the subgroup you want to delete.

**Note:**

Deleting all subgroups from a Custom List group also deletes the table group.

9. To add an existing subgroup from another table to the current table:

- a. Click **Add**.
- b. From the **Group Code** drop-down list, choose the group code that contains the subgroup you want to add.
- c. In the **Subgroups** field, click the subgroup you want to add.
- d. Click **Add**.

10. To create a new subgroup:

- a. Click **New**.
- b. Edit the fields as necessary. For a description of the fields, see [Table 54: Custom List Group Fields](#).
- c. Click **Submit**.

11. To edit an existing subgroup in the table:

- a. Click the red dot beside the table subgroup you want to edit.
Civic Platform displays the subgroup edit page.
- b. Edit the fields as necessary. For a description of the fields, see [Table 54: Custom List Group Fields](#).

12. Click **Update**.

Table 54: Custom List Group Fields

Custom Lists Group	Enter a unique code to identify the Custom List group that you are creating. If you are creating a subgroup for an existing group code, Civic Platform automatically populates this field with the group code that you are working with.
Custom Lists Group Subgroup	Enter the name of the subgroup you are creating.
Custom Lists Group Subgroup Alias	Enter the Custom List subgroup alias. The alias replaces the Custom List subgroup name in all areas where it displays to users in Civic Platform, Citizen Access, and Mobile Office.
Column Name	Enter the name of the first column for this table group.
Default Value	Enter a default value for the first field in your Custom List group.
<p> Note:</p> <p>If you are setting up a drop-down list, you can add values to the drop-down list so that a user can choose from multiple values. For instructions, see Setting or Editing Drop-Down List Field Values.</p>	
Display Len	Specify the maximum number of characters that Civic Platform displays.
Display new Custom Fields on existing Records	Select Yes to apply the new Custom Field to existing applications. Select No to apply the new Custom Field to new applications only.
	If you cannot see the option, you must configure the related Standard Choice.
	Refer to the Civic Platform Configuration Reference for additional information.

Display new Custom List on existing Education/ Examination/Continuing Education	Choose Yes to make the new user-defined field, list, or sub-group of user-defined fields available to existing education, examination and/or continuing education records in addition to being available for new records. Choose No to apply the new user-defined objects to new records only.
Display Order	Enter a number to determine the position of the first field in your Custom List group. For example, to display the field before any other fields, enter 1.
Group Display Order	Enter a number to determine the position of this list on the Custom Lists section of an application in Daily Activities. For example, if you want this information group to display in the second position, enter 2.
Req for Fee Calc	To require users to complete the Fee Calculation fields, choose Yes. Fields required for Fee Calculation display a visual indicator (\$) on the permit application form. You can configure this feature using the Function Identification 0242 Required for Fee Calculation.
Required Flag	To require users to enter a value in this field, select the Yes option.
Searchable	To make this Custom List searchable within Civic Platform, select the Yes option.
Status	To let users see this field in Civic Platform, click Enabled; otherwise, click Disabled.
Supervisor Edit Only	Select Yes to make this information read-only to non-supervisor users after a user creates an application. For further information about this field, please see Limiting Custom Field and Custom List Editing Rights to Supervisors Only .
Type	Choose the type of the first field in your Custom Lists group. For more information on field types, see Table 54: Custom List Group Fields .

Deleting Custom List Subgroups and Columns

Civic Platform has an option to delete Custom Field data and Custom List columns from all reference and transactional records. You can do this to restrict Custom Fields subgroups to only display in a historical record, new records, or both. You can also completely remove Custom List columns from historical transactional data, instead of just disabling the column.

If you delete the Custom List subgroup, Civic Platform deletes the information from all Custom Lists related to the subgroup. If you delete the column within a Custom List, you remove the column information, but the rest of the information in the Custom List continues to display. When you delete either a column or subgroup, it removes the related data from Custom List reference data, Custom List transactional data, Custom List drill downs, and Custom Fields security data. Expression records related to the deleted Custom List column or subgroup remain intact. The V360 user experience pages affected are the Custom List tab, the Record Summary tab, the new record in the Building portlet, and the Checklist tab in the Inspections portlet.



Note:

The delete function is permanent. You cannot retrieve deleted subgroups.

You have several options when you delete a Custom List column or subgroup. You can combine any of these options to determine the desired result. The first option is to apply the changes to only the selected subgroup or to all subgroups. The second is to remove the Custom List column or subgroup from the reference and associated Checklist transactional records. The third option enables you to hide the Custom List columns and subgroups for future records, but leave them visible in historical records.

To delete Custom List columns and subgroups

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose **Application > Custom Lists**.

Civic Platform displays the Custom Lists - Search page.

3. Enter relevant search criteria in the Group Code and Subgroup fields and click **Submit**. To browse all tables, Click **Submit** without entering any search criteria.
4. Click the red dot beside the Custom List that you want to edit.

Civic Platform displays the Custom Lists — Edit and Manage Subgroups window.

Application Specific Info Table - Edit and Manage Subgroups

Use this form to edit and manage Application Specific Info Table Subgroups.

Application Specific Info Table Group Code: ASIT_CONTACT

Subgroup	Display Order	Disable Sorting	
APPLICATION TRACKING	1	<input type="checkbox"/>	ACA Configuration Security Delete
ASIT_CONTACT	2	<input type="checkbox"/>	ACA Configuration Security Delete

[Update](#) [Add](#) [New](#)

5. To delete the entire subgroup, click **Delete**.

Civic Platform displays the Custom Lists Subgroup - Delete page.

Application Specific Info Table Subgroup - Delete

Application Specific Info Table Group Code: TEST

Application Specific Info Table Subgroup: TEST

-
- Delete Associated Cap Transactional Data
 Delete Associated Guide Sheet Transactional Data
 Delete Associated Contact Data
 Delete Associated Meeting Data
 Delete Associated Education/Examination/Continuing Education Data

[Submit](#) [Close](#)

6. Select the associated data you also want to delete.

Click **Submit**.

Civic Platform deletes the subgroup, along with any associated data that you selected for deletion.

7. To delete a column within the Custom List subgroup, click the red dot next to the subgroup, then click **Delete** next to the column you want to delete.

Civic Platform displays the Custom Lists Column - Delete page.

Application Specific Info Table - Edit and Manage Subgroups

Use this form to edit and manage Application Specific Info Table Subgroups.

Application Specific Info Table Group Code: ASIT_CONTACT

Subgroup	Display Order	Disable Sorting	
APPLICATION TRACKING	1	<input type="checkbox"/>	ACA Configuration Security Delete
ASIT_CONTACT	2	<input type="checkbox"/>	ACA Configuration Security Delete

[Update](#) [Add](#) [New](#)

Accela Automation: Application Specific Info Table Subgroup - Delete

Application Specific Info Table Subgroup - Delete

Application Specific Info Table Group Code: ASIT_CONTACT
Application Specific Info Table Subgroup: ASIT_CONTACT

Delete Associated Cap Transactional Data
 Delete Associated Guide Sheet Transactional Data
 Delete Associated Contact Data
 Delete Associated Meeting Data
 Delete Associated Education/Examination/Continuing Education Data

[Submit](#) [Close](#)

8. Do one of the following:

- If you are deleting a Custom List column, select either **Apply changes to this subgroup only** or **Apply changes to all subgroups**. If you select Apply changes to this subgroup only, Civic Platform only removes the column from the current subgroup. If you select Apply changes to all subgroups, Civic Platform removes the column from all of the subgroups in which the Custom List displays.
- To hide the column and subgroup for future records, but leave them visible in historical records, click **Submit** without selecting any options.
Civic Platform closes the page and hides the column or subgroup from new records.

Configuring Custom Field and List Drill-downs

You must configure Civic Platform to display Custom Field and Custom List drill-downs for Civic Platform users. The configuration steps include:

- Setting three FIDs
- Defining the Custom Field information in Classic Administration
- Creating or editing shared drop-down lists
- Creating or editing Custom List drill down records.

You can associate a Custom Fields Group with a Custom Field or Custom List in your application. To specify the application to apply the field or list to, you must associate the Custom Fields group or Custom List group with the record type. The shared drop-down lists contain the values for the Custom Field or Custom List drill-downs.



Note:

As soon as you associate the Custom Fields Group with a Custom List drill-down, the drill-down displays on the application, even if you have not assigned values to the drill down record. You can set the Custom Field or Custom List drill-down record as “inactive” until it is ready for the application.

Custom List drill-downs allow users to search for the value of a column with a drill-down approach. This drill down displays in the application. The drill-down functionality guides the user through a series of drop-down fields that present unique data choices based on previously-selected data fields. When you complete all the selections, Civic Platform displays a field or list drill-down table with the value results in the application. You can apply drill-down fields to multiple Custom Fields Groups. For example, you can apply a list of business license types to both business and professional licenses.

For example, you can prepare a list for multiple business license types. You can specify the first option, such as Agriculture, and then assign subgroups, such as Plants and Trees Cultivation, and Seeds and Crops Cultivation. You can then create additional groups for each of the subgroups which narrows the license options available. After you assign the groups and subgroups, the options display as Custom Lists in the public user view.

[Figure 13: Custom List Table Drill-Down – User View](#) shows a sample completed Custom List table drill-down.

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 "Benseem" And Oil Seeds Cultivation
<input checked="" type="checkbox"/> Agriculture	Seeds and Crops Cultivation	Oil Seeds Cultivation
<input type="checkbox"/> Building Materials	Iron and Basic Metals Products	Aluminum Sections And Extracts
<input type="checkbox"/> Building Materials	Iron and Basic Metals Products	Aluminum 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-Cast)
<input type="checkbox"/> Building Materials	Iron and Basic Metals Products	Casting Of Non-Ferrous Metals Such As Aluminum, Cement & Gypsum Casting
<input checked="" type="checkbox"/> Building Materials	Premixed Concrete, Cement	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 >](#)

Figure 13: Custom List Table Drill-Down – User View

Custom Fields and Custom Lists drill-downs are available to both Civic Platform and Citizen Access users. For information about the additional steps required to configure Custom Lists drill-downs for Citizen Access applications, see “Configuring ASI Table Drill-Downs” in the *Citizen Access Administrator Guide*.

To configure Custom Fields and Custom Lists drill-down display

1. Create or edit the Custom Fields group and subgroup and the Custom Lists group and subgroup.
2. On the Intake Form Configuration Group (Classic Administration > Application > Intake Form Configuration), select Yes on the Custom Fields and Custom Lists options.
For further details on Intake Form Configuration Groups, see [Working with Intake Form Configuration Groups](#).
3. Create or edit the shared drop-down lists with the values needed for the drill-down.
For details on completing this task, see [Creating Shared Drop-down Lists](#).
4. Create or edit the Custom Field or Custom List drill-down record.
For details on completing this task, see [Creating Custom Fields Drill-Downs](#).

Limiting Custom Field and Custom List Editing Rights to Supervisors Only

Administrators can set Custom Fields and Custom Lists to read-only for non-supervisor roles after an application is submitted. This means that any user other than a supervisor can only view, not edit, the information. Non-supervisor users can enter or change the information during application creation, but you can designate individual fields to allow only supervisors to update those data elements after a user saves the application. The supervisor edit only designation can also apply to individual subgroup fields in Custom Lists. For example, an intake clerk user can create and complete all fields for an application, but after the application is submitted, the clerk who is a non-supervisor user can read but not edit those fields.

To limit editing rights to Supervisor Edit Only

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Go to Application > **Custom Fields or Custom Lists**.
Civic Platform displays the search page.

Application Specific Info Table - Search

Use this form to search or add Application Specific Info Table Group.

Application Specific Info Table Group Code:

Application Specific Info Table Subgroup:

or

3. Enter relevant search criteria in the Group Code and Subgroup fields and click **Submit**. To browse, click **Submit** without entering any search criteria.
4. When you create or edit the Custom Fields or Custom Lists group, set the **Supervisor Edit Only** field to **Yes** and Click **Submit**.

Application Specific Info Table Group - Add

Application Spec Info Table Group Code * :

Application Spec Info Table Subgroup * :

Group Display Order:

Column Name * :

Type * :

Display Order * :

Default Value:

Required Flag: Yes No

Req for Fee Calc: Yes No

Supervisor Edit Only: Yes No

Searchable Flag: Yes No

Display Len:

ACA Displayable: Yes Hidden No

Status: Enable Disable

Configuring the Record Detail Audit Log

Civic Platform provides an audit log that contains modification details for each record. Audit logs enable you to track all activity that occurs on a record, including changes to Custom Fields and Custom List data. You can define an audit log for these activities within each application record.

When a user creates a record, the log records the first entry of each field. When a user makes a change to any of the record details including Custom Field and Custom List values, the log records the change. The log records the action performed such as added, updated, or deleted. The log also records the Custom Field and Custom List subgroup, the field, the updated value, the date, the current user and the product. For example, if an agency user needs to determine who changed custom data, such as the income value for a specific record, and when they changed it, they can access the record audit log to view the changes.



Note:

The audit log does not record activity on a partial record. A partial record can have many details in the application, but it is never complete until a user submits it. After it is complete and you submit the record, the record detail audit log records the activity.

Custom Fields Lookup Tables

Topics

- [Understanding Custom Fields Lookup Tables](#)
- [Creating Custom Fields Lookup Tables](#)
- [Adding Custom Fields Lookup Table Rows and Columns](#)
- [Searching for a Custom Fields Lookup Table](#)
- [Editing Custom Fields Lookup Table Data](#)

Understanding Custom Fields Lookup Tables

Custom Fields Lookup Tables provide fields for users to complete. They can also populate specific data as a reference for an record type.

You assign the Custom Fields Lookup Table to a record type, and the Lookup data displays in the Custom Fields section for that record type. You can also create Lookup Tables for use with expressions. With Expression Builder, administrators can design Lookup Tables to populate data into other fields in the Custom Fields section of a record, add a new row to the end of a Custom Fields Lookup Table, or store new data in a Custom Fields Lookup Table.

To use the Custom Fields Lookup Tables feature, you must first create the Custom Fields group in Classic Administration.

After you set up a Custom Fields group, you can use it in multiple record types. See [Creating a New Custom Fields Group or Subgroup](#).

Creating Custom Fields Lookup Tables

After you create a Custom Fields Lookup Table, you can apply it or its column data to a record via Expression Builder ([Using Expression Builder](#)). When creating an expression you can include criteria so the Lookup Table gets a new row added to it. For example, you can specify that if a field value for a Custom Field has the option “R2” selected, specific data will be added to the end of the Lookup Table.

You can also add data into a specific cell of a Lookup Table based on matching criteria. For example, if a user enters “R4” into the Zone field, then you can add a corresponding row of data to the Lookup Table.

To create a Custom Fields lookup table

1. Access the Custom Fields Lookup Tables portlet ([Navigating to the Setup Portlet](#)).
2. Click **New**.
Civic Platform displays the Custom Fields Lookup Table Name detail portlet with Table Structure secondary tab.
3. Click the Record Type picker, next to the Lookup Table Name field.
The Record Type navigation tree displays.
4. Use the (+) to expand the list and (-) to locate and select a record type to apply the lookup table name.
Civic Platform displays the Column Name drop-down list. The Record Type field displays the record type selected.
5. Click **New Column** to add other columns to the Custom Fields Lookup Table. Do the following:
 - a. From the New Column drop-down list, select the column name.
See the [Table 55: Custom Fields Lookup Tables Fields You Can Modify](#).
 - b. Enter a lookup table name in the Lookup Table Name field associated with the Custom Fields Group Code for that record type.
6. Click **Submit**.

Civic Platform adds the new column to the Custom Fields Lookup Table list.

7. Repeat for each new column required for the table.
8. Click the **Table Data** tab to set up the content for the row cells within each column.
9. In the first field of the new row, add the text of other content as required.
10. Optionally, click **New** to add other rows to the Custom Fields Lookup Table.
11. Click **Submit** to save all modifications.

The Table Data updates to the database successfully.

Table 55: Custom Fields Lookup Tables Fields You Can Modify

Column Name	An inactive new Column Name displays. Complete and submit the Lookup Table Name and Record Type fields. Then click Table Data and use the Record Type picker to select a Record Type to associate the column to.
Lookup Table Name	In the Table Structure secondary tab: Add a new name for the table. Lookup Table Name is a required field.
Record Type	<p>In the Table Structure secondary tab: Click the record type using the Record Type picker. Use the plus sign (+) to expand and select the record type you want to apply the lookup table name to (record type is a required field). Then select the Column Name from the drop-down list.</p> <p>Record Type</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> AMS <input type="checkbox"/> Building <input type="checkbox"/> Licenses <input type="checkbox"/> Planning <input type="checkbox"/> PublicWorks <input type="checkbox"/> ServiceRequest <p>If the record type you select does not yet have a Custom Fields Group Code associated with it, go to Classic Administration > Application > Custom Fields and set up a Custom Fields Group. Then use the Custom Fields Form Layout Editor in Civic Platform to design the appearance and function of those Custom Fields for that record type.</p>

Adding Custom Fields Lookup Table Rows and Columns

Use this page to specify the record type that contains the Custom Fields you want to add to a Custom Fields Lookup Table. Based on the record type, you select the column data you want to add to the table. Then use the Table Data to add rows and enter the appropriate values, data or numerical values for each row in each column.

You can to add one or more columns to the table.



Note:

To create a table structure you must first create a Custom Fields group and optionally, a subgroup. You can do this by going to Classic Administration > Custom Fields.

To create a Custom Fields lookup table name and add columns and data

1. In the Custom Fields Lookup Table Name detail portlet, complete these fields:

Lookup Table Name Enter name to identify the table or its columns or functions.

Record Type	Locate the record type to which you want to expose Custom List data. If the record type you select has no Custom Fields associated with it, you must use Classic Administration to set up a Custom Fields group code. Then use the Custom Fields Form Layout Editor in V360 Admin to design the appearance and function of the Custom Fields.
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2. Click **New Column** to add additional columns to the Lookup Table. Specify the column name for the drop-down list. Repeat this step for each new column required for the table. Click **Submit**.
Civic Platform updates the column data and the Lookup Table Name field and Record Type field become inactive. You cannot modify these fields.
3. Click the Table Data tab to set up the content for the row cells within each column.
4. Click **New** to add a new row to the Lookup Table.
5. In the first field of the new row, add the text of other content as required. This information populates for daily users to refer to as they process the record type.
6. Add additional rows and enter the data, text, or numerical values.
7. Click **Submit** to save all modifications.

The Table Data updates to the database successfully.

Searching for a Custom Fields Lookup Table

To locate a Custom Fields Lookup table

1. Click **Search**.
Civic Platform displays the Custom Fields Lookup Table search screen.
2. Enter the full name or the initial letters for the name in the Lookup Table Name field.
3. Click **Submit**.
Civic Platform displays search results for you to choose from.
4. To return to the Custom Fields Lookup Tables portlet, click Search, clear the search fields, and then Click **Submit**.

Editing Custom Fields Lookup Table Data

Use the Custom Fields Lookup Table portlet to add data or delete data from a row in a Custom Fields Lookup Table.

To add data to or delete data from a row in a Custom Fields Lookup Table

1. From the Table Structure tab, mark the Column Name you need to add or remove data.
2. Click the Table Data tab.
Civic Platform displays the column names and the current data for each row.
3. Do one of the following:
 - a. To add a row, click **New** and enter the data for the new row. In the first field of the new row, add the text of other content as required. This information populates for daily users as they process the record type. This information displays in the Custom Fields section of the record type.
 - b. To enter multiple row data, Click **New Row**.

c. To delete a row, mark the check box next to the row to remove from the table and click **Delete**.

Civic Platform deletes the record from the Table Data list

4. Click **Submit.**

"Table Data Created Successfully" displays. Civic Platform saves the changes to the Custom Fields Lookup Table Name.

Designing Application Intake Forms

Click a topic title below for full details.

Related Information

- [Understanding the Form Layout Editors](#)
- [Designing a Form Layout](#)
- [Creating Custom Fields Drill-Downs](#)

Understanding the Form Layout Editors

Consult the list below to determine which Form Layout Editor tool you need to use for the type of form you want to create or edit.

APO Form Layout Editor

The fields you add display in any of these sections on a new application: Address Information, Owner Information, and Parcel Information.

You specify the APO Type of Address, Parcel, or Owner. When a user creates a new application, these fields display at the bottom of the APO Type section, for example in the Owner Information section if you added fields to the Owner APO Type.

ASI Form Layout Editor

The unique fields you add display in the application-specific information section of an application based on the application type.

You must obtain the application-specific information group codes for the application type you want to add fields. When a user creates an application type, these fields display in the ASI section.

To understand how to set up application-specific information group codes, see [Working with Activity-Specific Information Group Codes](#). An application-specific information group is a group of fields that you want to include on an application in addition to standard fields such as contact information. You can locate this feature in the following areas:

- Classic Administration > Application > Application Spec Info
- V360 Admin > Application > ASI Lookup Tables.

Asset Form Layout Editor

The fields you add display in the Asset Detail form of an asset based on the asset type.

You must obtain the Asset Template ID for the asset type where you want to add fields. When a user creates an asset type, these fields display at the bottom of the Asset Detail form.

To learn how to set up asset templates, see [Attributes and Templates](#)

TSI Form Layout Editor

The unique fields you add display in the task-specific information section of a workflow task based on the task.

You must obtain the task-specific information group name for the workflow task to which you want to add fields. When a user creates an application and Civic Platform assigns a set of workflow tasks, these fields display in the TSI section at the bottom of the Task Details form.

To understand how to set up task-specific information groups, see [Configuring Agency-defined Fields for Workflows](#). A workflow is a set of tasks an agency defines and follows for the purpose of managing an application. Workflow tasks function as the agency's to-do list when a user creates an application. A task-specific information group is a group of fields that you want to include on a task in addition to the

standard task fields, such as status, status date, and comments. You can locate this feature in Classic Administration under Admin Tools > Workflow > Task Specific Info.

Designing a Form Layout

Designing a form layout consists of the following topics.

Topics

- [Creating a Form Layout](#)
- [Searching for a Form](#)
- [Editing a Form Layout](#)
- [Copying a Form Layout](#)

Creating a Form Layout

Creating a new screen is the first step in setting up the fields you want to expose in a form to a certain group of users. You can add, customize, and manipulate the size of each field, and use the buttons on the screen to preview, align, add dynamic text, draw lines and insert tables.

To create a new form portlet layout

1. Access the appropriate Form Layout Editor ([Accessing the Form Layout Editors](#)).
 2. Click **New**.
- Civic Platform displays the Screen Name page.
3. Select the appropriate item from one of these drop-down lists, APO Type, Custom Fields Group Code, Asset Template ID, or TSI Group Code:
- a. Select the **APO Type** from the drop down list.

Select the APO Type associated with the fields you want applied to the new APO Screen Name. The APO Screen Name might be a name to easily identify the fields or their unique functions for the APO Type.

When a user creates a new application, the fields you add display at the bottom of the APO Type section, for example in the Owner Information section if you added fields to the Owner APO Type.

- b. Select the **Custom Fields Group Code** from the drop down list.

Select the Custom Fields Group Code applicable to the fields you want to apply to the new Custom Fields Screen Name. The Custom Fields Screen Name should enable you to easily identify the fields or functions of the Custom Fields Group Code.

The Custom Fields Group Code is a unique code name that identifies the custom fields you are working with. A Custom Fields Group is a group of fields that you want to include on an application in addition to the standard application fields such as address, contact, and owner details.

The items in this drop-down list are based on your configurations in Classic Administration > Admin Tools tab > Application > Custom Fields.

For information and details on setting up Custom Fields Groups, see [Creating Custom Fields](#).

- c. Select the **Asset Template ID** from the drop down list.

Template ID

Screen Name:
Submit Cancel Help

Select the Asset Template ID applicable to the fields you want to apply to the new Asset Screen Name. The fields you add display in the Asset Detail form of an asset based on the asset type. When a user creates an asset type, these fields display at the bottom of the Asset Detail form. The Asset Screen Name might be a name to easily identify the fields or functions of the asset template ID or asset type.

To understand how to set up asset templates, see [Attributes and Templates](#)

- d. Select the **TSI Group Code** from the drop down list.

TSI Group Code

TSI Screen Name:
Submit Cancel Help

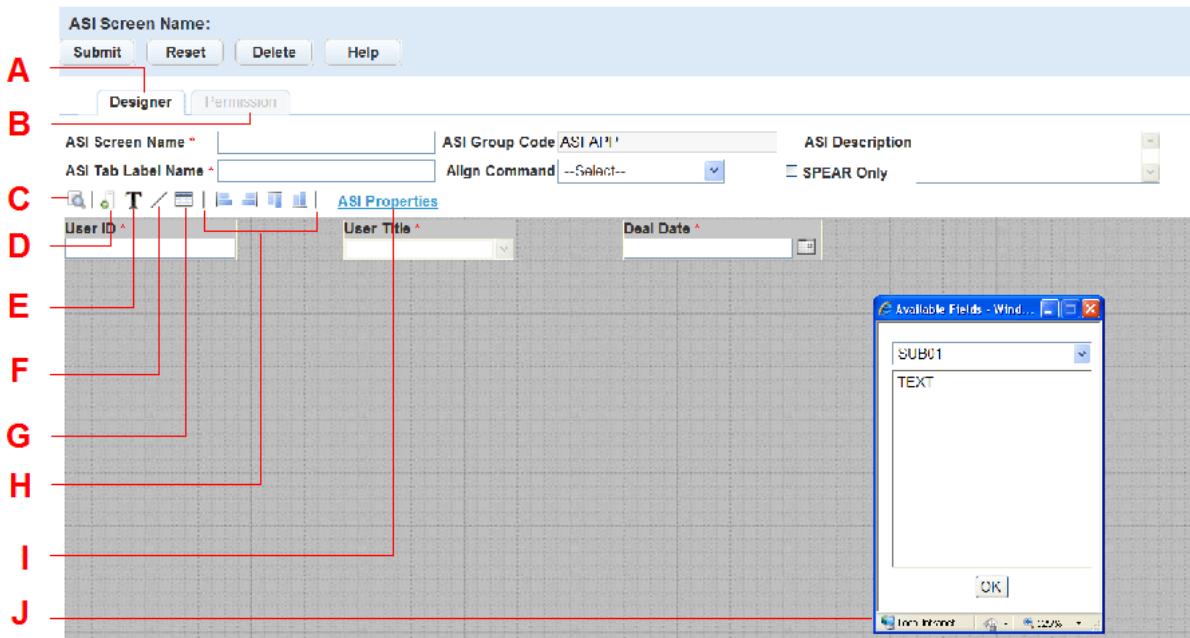
Select the TSI Group Code applicable to the fields you want apply to the new TSI Screen Name. The TSI Screen Name might be a name to easily identify the fields or functions of the TSI Group Code.

You must obtain the task-specific information group name for the workflow task to which you want to add fields. When a user creates an application and Civic Platform assigns a set of workflow tasks, these fields display in the TSI section at the bottom of the Task Details form.

To understand how to set up task-specific information groups, see [Designing Workflows](#). A workflow is a set of tasks an agency proscribes and follows for the purpose of managing an application. Workflow tasks functions as the agency's to-do list when a user creates an application. A task-specific information group is a group of fields that you want to include on a task in addition to the standard task fields, such as status, status date, and comments. You can locate this feature in Classic Administration under Admin Tools > Workflow > Task Specific Info.

4. Click **Submit**.

Civic Platform displays the Screen Name page and the Available Fields page, which contains the fields associated with the APO Type, Custom Fields Group Code, Asset Template ID, or TSI Group Code.



- A The Designer tab is where you create and design the form.
- B The Permission tab is where you assign permissions and make forms available to users.
- C The Preview button. Click to preview your changes.
- D The Available Fields button. Click to view the available fields you can add to this page. Double-click the name of the field to add it to the form.
- E The Add Label button. Click to add text to the page.
- F The Add Line button. Click to add a line to the page.
- G The Add Custom Lists or Attributes button. This button is only available in the Custom Fields tool and the Asset Form Layout Editor. Click the button to add the table associated with a Custom Fields Group Code or an Asset Template ID to the form.
- H The Alignment buttons. Click to align the fields left, right, top, or bottom.
- I Custom Fields Properties. This link takes you to respective configuration area in Civic Platform. The fields available pertain to the attribute template for the APO Type, the Custom Fields subgroups, or the Workflow subgroups. If you need to add a field to available fields list, you must first add it to the respective area: the attribute template, the Custom Fields subgroups, or the Workflow subgroups.
- J The Available Fields window. This window displays all available fields for the APO Type, Custom Fields Group Code, Asset Template ID, and TSI Group Code. Double-click the field name to add it to the form.

5. Complete the appropriate fields for the form you are designing. Go to the substep for the screen name you are designing: APO screen name, Custom Fields screen name, Asset screen name, or TSI screen name.

APO Screen Name:

Align Command	Use this drop-down list after you have added fields to the screen. Highlight a field and click Align to move the field. To align multiple fields, hold the Ctrl key, click each field you want to move, then click Align.
APO Description	Enter descriptive text to help identify the form use or its function.
APO Screen Name	Enter the screen name for the page.
APO Type	This read-only field is pre-filled with the choice you made in .

Custom Fields Screen Name:

Align Command	Use this drop-down list after you have added fields to the screen. Highlight a field and click Align to move the field. To align multiple fields, hold the Ctrl key, click each field you want to move, then click Align.
Custom Fields Description	Enter descriptive text to help identify the purpose of the form.
Custom Fields Group Code	This read-only field is pre-filled with the choice you made in .
Custom Fields Screen Name	Enter the screen name for the page. When creating a standard Condition, this name becomes available in the Template drop-down list of the New Condition detail portlet.
Custom Fields Tab Label Name	Enter the detail portlet tab label associated with this screen.
SPEAR Only	The SPEAR Only option enables you to define Custom Fields forms for a Custom Fields group used in the application. For example, a Custom Fields group with 400 fields is a large number of fields. Not all of those fields are necessary during record creation. Choose SPEAR only if you want to define a form for the Custom Fields Group Code and display it on the application if you enabled ac Custom Fields Smart Choice group.

Asset Screen Name:

Align Command	Use this drop-down list after you have added fields to the screen. Highlight a field and click Align to move the field. To align multiple fields, hold the Ctrl key, click each field you want to move, then click Align.
Asset Description	Enter descriptive text to help identify the form use or its function.
Asset Template ID	This read-only field is pre-filled with the choice you made in .
Asset Screen Name	Enter the screen name for the page.

TSI (Task Specific Information) Screen Name:

Align Command	Use this drop-down list after you have added fields to the screen. Highlight a field and click Align to move the field. To align multiple fields, hold the Ctrl key, click each field you want to move, then click Align.
TSI Description	Enter descriptive text to help identify the form use or its function.
TSI Group Code	This read-only field is pre-filled with the choice you made in .
TSI Screen Name	Enter the screen name for the page.
TSI Tab Label Name	Enter the detail portlet tab label associated with this screen.

6. Add fields to the screen.

- a. Click **available fields** to open the available fields page.
- b. If there is more than one APO template, Custom Fields subgroup, Asset template, or TSI subgroup the available fields page has a drop-down list. Choose the template or the subgroup name from the drop-down list. Then hold down the Ctrl key and click each field name you want to add to the page.

c. Click OK.**7. Resize and position each field using the mouse.****8. Customize the fields to change font, color, or add a watermark.**

- a. Right-click the field you want to customize and choose **Properties**.

Civic Platform displays the Properties window.

b. Customize the fields below.

Label	Custom label name for the field.
DB Label	Database default label name.
Watermark Label	Enter the text you want to be initially display in the field. When a user tabs or moves off one field the results might display in the next field, replacing the watermark label text with new data.
Font	Select the font from the drop-down list. If there are no available fonts, see the Standard Choice in Understanding the Form Layout Editors .
Justification	Specify justification of label name with drop-down list.
Color	Click the color picker to choose the color of the text label for the field.
Width	Enter the width of the attribute field you want to display in the form.
Height	Enter the height of the attribute field you want to display in the form.

9. Delete any unnecessary fields.

a. Right-click on the field you want to delete.

b. Choose **Delete** from the drop-down list.

10. Add lines or additional dynamic text accessed by corresponding buttons.

11. Click **Preview** to evaluate whether you want to make adjustments.

12. When you are happy with the form layout click **Submit**.

Searching for a Form

To search for a form

1. Access the appropriate Form Layout Editor ([Navigating to the Setup Portlet](#)).

2. Click **Search**.

Civic Platform displays the form layout editor search screen.

3. Enter search criteria as necessary.

For a description of the fields that display on the search screen, see [Creating a Form Layout](#).

4. Click **Submit**.

Civic Platform displays the screens that match your search criteria.

Editing a Form Layout

Edit Custom Fields screens by adding or removing fields, manipulating the size of the fields, or applying customization.

To edit a form layout

1. Access the appropriate Form Layout Editor ([Accessing the Form Layout Editors](#)).

2. Select the **Screen Name** on which you want to act.

Civic Platform displays the Screen Name detail page.

ASI Screen Name:
Submit Cancel Help
ASI Group Code -Select Group Code-
ASI Screen Name: Building

3. Make the necessary edits to fields. For information on how to make changes to the screen, see [Accessing the Form Layout Editors](#).

4. Click **Submit**.

Copying a Form Layout

You can copy an existing form layout screen name from the list and update it as necessary.

To copy a form layout

1. Access the appropriate Form Layout Editor (v).
2. Select the screen you want to copy and click **Copy**.
3. Make the necessary edits to fields. For information on how to make changes to the screen, see [Creating a Form Layout](#).
4. Click **Submit**.

Assigning Permissions

After creating the form, decide which user group or module requires permission to edit or view the fields. For example, you might want to assign permission for a supervisor to enter data in the fields, limit other users to view-only access, and perhaps restrict another group from being able to see the information whatsoever. Make the appropriate permission assignments based on the access-level required by each user type and group.

You can further refine permissions and access-levels by setting Application Type Security, Record Type Security, and Workflow Security. For more information about Security, see [Setting Up Security Policies](#).

To access and assign a view

1. Access the appropriate Form Layout Editor ([Accessing the Form Layout Editors](#)).
2. Select the **Screen Name** on which you want to act.

Civic Platform displays the Screen Name detail page.

ASI Screen Name:
Submit Cancel Help
ASI Group Code -Select Group Code-
ASI Screen Name: Building

3. Go to the **Permissions** tab.

Civic Platform displays the Permissions detail portlet for the screen name.

ASI Screen Name: Edit group 1
Assign Submit Delete Help
Designer Permission
Type Access Name
Module Full Building

4. Click **Assign**.

5. Select the **Module, Group or User** from the drop-down list.
Civic Platform displays a navigation tree with associated selection.
6. Navigate through the tree view to select the associated Module, Group, or User.
7. Click **Submit**.
8. Use the drop-down list to assign **Full Access, Read Only, or No Access** for the Module, Group, or User.
You can change the access level at any time.
9. Click **Submit**.

Creating Custom Fields Drill-Downs

Custom Fields drill-downs guide users through a series of drop-down lists that present unique data choices based on previously-selected data field selections. When the user completes all of the selections, Civic Platform displays the field or a drill-down table with the value results.

Drill-downs display in the application and in the App Spec Info or App Spec Info Table tabs in the application record.

For example, you can prepare a table for multiple business license types. You can set the first option, such as Agriculture, and then assign subgroups, such as Plants and Trees Cultivation, and Seeds and Crops Cultivation. You can then create additional groups for each of the subgroups which narrows the license options available. After you assign the groups and subgroups, the drill-down options display in the public user view.

Topics

- [Searching for a Drill-Down](#)
- [Creating or Editing a Custom Fields Drill-Down](#)
- [Creating or Editing a Custom Lists Drill-Down](#)
- [Understanding the Drill-Down Series Tab](#)
- [Assigning Values to a Custom Fields Drill-Down Series](#)
- [Enabling Drill-Downs to Display](#)

Searching for a Custom Fields Drill-Down

1. Go to **Administration > Drill Down > Custom Fields Drill-Down**.
2. Click **Search**.
Civic Platform displays the Custom Fields Drill-Down search page.
3. Complete any fields that display. For a description of the fields, see [Custom Fields Drill-Down Fields](#).
4. Locate the Custom Fields drill-down you want to edit in the list.
5. Click the Custom Fields drill-down link in the Drill Down column.
Civic Platform displays the Custom Fields drill-down record details.

Creating or Editing a Custom Fields Drill-Down

You can create a drop-down field to enable users to search for the value of a Custom 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 Custom Fields 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 a user completes all of the selections, Civic Platform displays the value results. You can apply drill-down fields to multiple groups.

For example, your agency can create a drill down for Business License applications. The first drill-down lists the nature of the license, such as Agriculture, Bakeries and Confectionery, and Building Materials. If the user selects Building Materials, the next drill-down lists materials such as Paints and Bonding Materials, Tiles and Ceramics, and Wood and Wooden Products. If the user selects Wood and Wooden Products, the third drill-down lists options such as Import of Wood, Furniture Repair and Refurbishing, Plywood Manufacture, and Sawdust Collection and Recycling. See the example screen below.

The Custom Fields drill-downs displays on the application, application records, and checklists specified for that record type. If you add a drill-down for a Custom Fields group that belongs to more than one record type, the drill down is active for all of those record types. For further details, see [Creating Custom Fields](#).

The screenshot shows a Civic Platform application interface. On the left, there is a large dropdown menu with a red border containing a hierarchical list of categories. The categories include:

- R-1 Hotel/Motel/Boarding House/Transient
- R-2 Apartment/Non-Transient Hotel/Convent/Fraternity
- R-3 Single Family/Duplex Residence/Child Care 5 or Less/Congregate Living 15 or Less
- R-4 Residential Assisted Living (5-15)
- A-1 Theaters/Concert Halls
- A-2 Nightclub/Restaurant/Bar/Banquet Hall
- A-3 Amusement/Church/Gym/Library/Museum
- A-4 Arena/Spectator Seating
- A-5 Amusement Park/Bleachers/Stadium/Grandstand
- B Business
- E Educational School to 12th Grade/ Child Care (More than 5)
- F-1 Factory Moderate Hazard
- F-2 Factory Low Hazard
- H-1 Hazard Detonation
- G-2 Hazard Air-Born Deflagration
- H-3 Hazard Flammable/Combustible
- H-4 Hazard Health
- H-5 Hazard Semi-Conductors
- I-1 Institutional Rehab/Assisted Living/Group Home
- I-2 Institutional Hospital/Nursing Home
- I-3 Institutional Prisons/Dentention
- I-4 Institutional Day Care (More than 5)
- M Mercantile
- S-2 Light Hazard Storage
- S-1 Moderate Hazard Storage
- U Utility Agriculture/Accessory/Fence/Tower
- Mixed Occupancy

Below this main dropdown, there are three smaller dropdown menus:

- Type of Construction: "Select--"
- Fire Sprinkler Type: "Select--"
- Irrigation Meter Size: "Select--"

On the right side of the screen, there is a "Proposed Use" section with its own dropdown menu. This dropdown also has a red border and contains the following options:

- Apartment
- 5/8 in
- 1 in
- 1 1/2 in
- 2 in
- 3 in Compound
- 4 in Compound
- 5 in Turbo
- 6 in Turbo
- Not Applicable
- Select--

Below the "Proposed Use" dropdown, there are two more dropdown menus:

- Backflow Device: "Select--"
- Backflow Device: "Select--"

Figure 14: Application Record Custom Fields Drill-Down

To create or edit a Custom Fields drill-down

1. Go to **Administration > Drill Down > Custom Fields Drill-Down**.
2. Click **New**, or click the name of the item you want to edit.
Civic Platform displays the Drill Down detail portlet.

The screenshot shows a configuration interface for a custom field. At the top, there are buttons for 'Drill Down', 'Submit', 'Reset', and 'Help'. Below these are tabs for 'Drill Down', 'Drill Down Series', and 'Value Mapping'. The 'Drill Down' tab is selected. On the left, there is a dropdown menu labeled 'Drill Down *' with the value 'ASI Type'. Next to it is another dropdown labeled 'ASI Subgroup *' with the value 'Select-'. To the right, there is a section titled 'Apply To' with three radio button options: 'AA Only' (selected), 'ACA Only', and 'Both'. At the bottom left, there is a dropdown for 'Record Status' set to 'Active'.

3. Complete the necessary fields, then click **Submit**.

For a list of fields, see [Custom Fields Drill-Down Fields](#).

Note: As soon as you associate a Custom Fields group with a Custom Fields drill-down, the drill-down displays on the application and in the record, even if you have not assigned values to it yet. You can set the drill-down's record status to Inactive while you are working on it and then change the status to Active when it's ready.

4. Go to the **Value Mapping** tab.

Civic Platform displays the series order.

The screenshot shows the 'Value Mapping' tab of the drill-down configuration. It features a tree view on the left with nodes for 'Parent' and 'Job Type'. Under 'Job Type', there are three items: 'Traffic Flow Impediment', 'Traffic Flow Slowed', and 'Traffic Flow Not Impacted'. To the right of the tree view is a 'Help' button.

5. Click the plus (+) sign in the picker, then click the parent Custom Fields item.

Civic Platform displays a secondary portlet that lists the shared drop-down values linked to the drop-down selected for the parent Custom Fields drill-down.

The screenshot shows the 'Value Mapping' tab with a secondary portlet on the right. The portlet title is 'Parent Column/Field Value: Traffic Flow Impediment'. It contains 'Submit' and 'Help' buttons. Below the title, it says 'Child Column/Field: 401-600 Amps'. A list of 'Child Values' is shown with checkboxes: 'Citizen', 'Staff', 'Government Official', 'Law Enforcement Officer', and 'Unknown'. The 'Traffic Flow Impediment' item from the tree view is highlighted in blue.

6. Select the value(s) you want to apply to the drill down, and then click **Submit**.

7. Click the plus (+) sign in the picker, then click the child item.

Civic Platform displays the shared drop-down values that you associated with the drop-down values.

8. Select the value(s) you want to apply to the drill down, and then click **Submit**.

Creating or Editing a Custom Lists Drill-Down

Users can search for the value of a Custom List with a drill-down approach. Custom Lists display in the application and in the Custom Lists tab of the application record. 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 the user completes all of the selections Civic Platform displays a drill-down table with the value results. The drill-down feature allows users to filter the list of value results by performing a search within the results values. You can apply drill-down tables to multiple Custom Fields and Custom List groups. For example, the agency can apply a table of business license types to both business or professional licenses.

You must create or edit an existing Custom Lists drill-down before applying the drill down to an application.

In the Drill Down details area, each combination of Custom List groups and subgroups can only apply to one active drill down at a time. The Custom List drill-down displays on the application specified for that record type. If you add a drill down for a Custom List group you assigned to more than one record type, the drill-down is active for all of those record types. For further details, see [Creating Custom Fields](#).

To create or edit a Custom Lists drill-down

1. Go to **Administration > Drill Down > Custom Fields Drill-Down**.
2. Click **New**, or click the name of the record you want to edit.

Civic Platform displays the Drill Down detail portlet.

3. Complete the necessary fields, then click **Submit**.

For a list of fields, see [Custom Fields Drill-Down Fields](#).



Note: As soon as you associate a Custom Fields group with a Custom Fields drill-down, the drill-down displays on the application and in the record, even if you have not assigned values to it yet. You can set the drill-down's record status to Inactive while you are working on it and then change the status to Active when it's ready.

4. Do the following:

- a. Establish the drill-down relationship. See [Understanding the Drill-Down Series Tab](#).
- b. Assign values to drill-down series. See [Assigning Values to a Custom Fields Drill-Down Series](#).

Table 56: Custom Fields Drill-Down Fields

Drill Down	Enter a unique name for the Custom Fields Drill-Down.
Custom Fields Group	Use the picker to select the Custom Fields or Custom Lists groups to apply to the drill down. You define the Custom Fields and Custom Lists groups and subgroups in Classic Administration > Admin Tools > Application > Custom Fields (or Custom Lists).

Custom Fields Subgroup	<p>Click the picker for the Custom Fields Subgroup field, then click the Custom Fields group or Custom Lists group name to expand the view and display the subgroups applicable to each group.</p> <p>The first Custom Fields subgroup list is the primary subgroup. To choose a primary subgroup, double-click the desired subgroup. All other subgroups display in alphabetical order.</p> <p>The configuration of the primary Custom Fields subgroup, including column names, field types, display order, and so forth, becomes the default for all subgroups attached to the drill-down. If the configuration for subsequent Custom Fields subgroups does not match, Civic Platform displays an alert message to notify you that the drill down cannot display on the Custom Fields subgroup.</p> <p>If you want to disassociate a single Custom Fields subgroup from the Custom Fields drill-down, click the Custom Fields subgroup and then click Delete.</p> <p>If you want to disassociate multiple Custom Fields subgroups, press the Ctrl key on your keyboard while clicking the unwanted Custom Fields subgroups. After you have highlighted all unwanted subgroups, click Delete.</p>
Custom Fields Type	Choose either Custom Fields or Custom Lists to determine which type of drill-down to create.
Apply To	To determine whether the drill-down displays in Civic Platform, Citizen Access, or both products, click the appropriate option.
Record Status	<p>Select Active or Inactive.</p> <p>Set the drill-down's record status to Inactive while you are working on it and then change the status to Active when it's ready.</p>

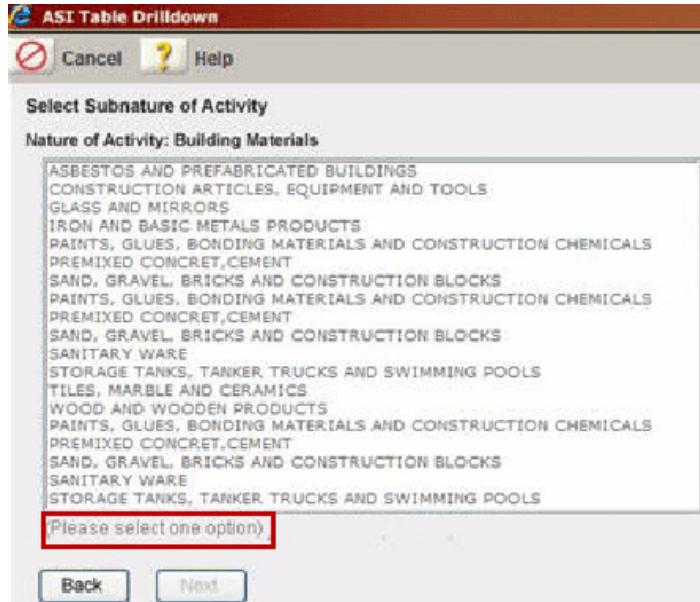


Figure 15: Custom Fields Drill-Down Table Select Single Item

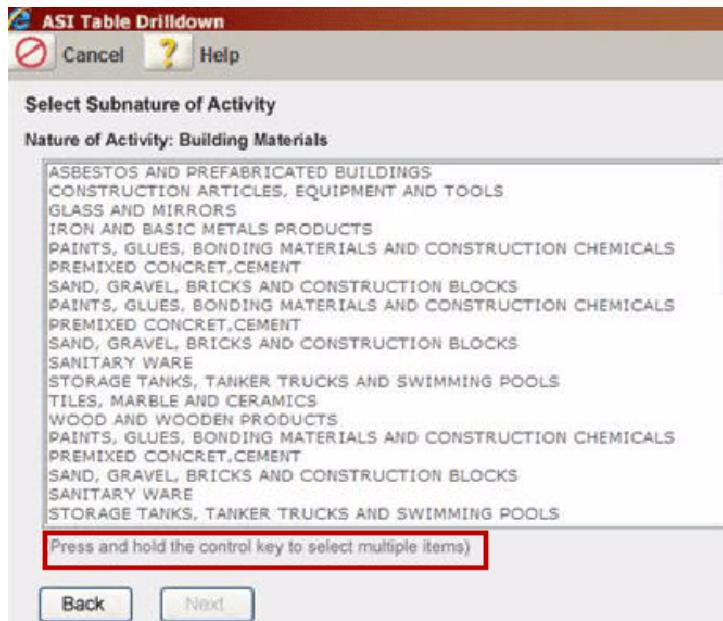


Figure 16: Custom Fields Drill-Down Table Select Multiple Items

Understanding the Drill-Down Series Tab

The Drill Down Series tab determines how many drill-down levels you want to display in the drill-down. **You need only add two columns in the series to display three drill-down levels.** After you have entered your information into this tab, you progress to the Value Mapping tab to determine the data values for each level.

To create a drill-down series

1. Access the Custom Fields Drill-Down portlet ([Accessing the Custom Fields Drill-Down Portlet](#)).
2. Select the Custom Fields drill-down you want to work with.
3. Go to the **Drill Down Series** tab. This is where you specify how many drill-down levels you want to display in the drill-down.



Note: You cannot access the Drill Down Series tab until you save the new drill-down record.

Civic Platform displays the Drill Down Series tab in the detail portlet.

Drill Down: BLDG_COM_ADD

Submit New Delete Help

Drill Down Drill Down Series Value Mapping

ASI Drill Down Series:

Type	Parent Column/Field	Parent Drop Down	Child Column/Field	Child Drop Down
<input type="checkbox"/>	Single Occupancy 1	Shared Occupancy CET	Type of Work 1	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 2	Shared Occupancy CET	Type of Work 2	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 3	Shared Occupancy CET	Type of Work 3	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 4	Shared Occupancy CET	Type of Work 4	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 5	Shared Occupancy CET	Type of Work 5	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 6	Shared Occupancy CET	Type of Work 6	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 7	Shared Occupancy CET	Type of Work 7	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 8	Shared Occupancy CET	Type of Work 8	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 9	Shared Occupancy CET	Type of Work 9	Shared TypeOfWork CE
<input checked="" type="checkbox"/>	Single Occupancy 10	Shared Occupancy CET	Type of Work 10	Shared TypeOfWork CE

4. Establish the drill-down relationship.

To create additional drill-down levels, repeat sub-steps a - c above. Civic Platform automatically identifies the Parent Custom Fields drill-down type and shared drop-down list as the Child from the previous level. Specify the relevant Custom Lists Subgroup in the Child Column and Child Drop Down for the new level.



Note:

You need only specify two rows for three drill downs.

a. Click New.

Civic Platform displays a Custom Fields Drill Down series row.

Drill Down: BLDG_COM_ADD

Submit New Delete Help

Drill Down Drill Down Series Value Mapping

ASI Drill Down Series:

Type	Parent Column/Field	Parent Drop Down	Child Column/Field	Child Drop Down
<input type="checkbox"/>	Single Occupancy 1	Shared Occupancy CET	Type of Work 1	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 2	Shared Occupancy CET	Type of Work 2	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 3	Shared Occupancy CET	Type of Work 3	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 4	Shared Occupancy CET	Type of Work 4	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 5	Shared Occupancy CET	Type of Work 5	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 6	Shared Occupancy CET	Type of Work 6	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 7	Shared Occupancy CET	Type of Work 7	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 8	Shared Occupancy CET	Type of Work 8	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 9	Shared Occupancy CET	Type of Work 9	Shared TypeOfWork CE
<input type="checkbox"/>	Single Occupancy 10	Shared Occupancy CET	Type of Work 10	Shared TypeOfWork CE
<input checked="" type="checkbox"/>	Single ---Select---		---Select---	

b. Enter the necessary information into these fields:

Type

Use the drop-down list to determine whether the Single or Multiple Selection Drill-down page displays for the daily user. If you select "Single," the user can only select one value from the drill-down page. "Multiple" allows users to select multiple options in the drill-down page by pressing the "Ctrl" key and clicking all of the desired options on the page. For an example, see [Custom Fields Drill-Down Table Select Single Item](#) and [Custom Fields Drill-Down Table Select Multiple Items](#).

Parent Column/Field	Select the Custom Lists Group from the drop-down list. The drop-down option relates to the subgroup you selected on the Drill Down tab. When creating a new Custom List drill-down this field is editable. When updating an existing Custom List drill-down the field is read-only, but you can delete the row.
Parent Drop Down	Click Search to select the shared drop down list used to populate the first level on the Custom List drill down.
Child Column/Field	Select the Custom Lists Subgroup from the drop-down list. The drop-down option relates to the subgroup you selected on the Drill Down tab. When creating a new Custom Lists drill-down this field is editable. When updating an existing Custom List drill-down the field is read-only, but you can delete the row.
Child Drop Down	Click Search to select the shared drop-down list used to populate the second level on the Custom Lists drill down.

c. Click Submit.

Civic Platform saves the series information.

ASI Drill Down Series:				
Type	Parent Column/Field	Parent Drop Down	Child Column/Field	Child Drop Down
<input type="checkbox"/>	Occupancy 1	Shared Occupancy CET	Type of Work 1	Shared TypeOfWork CE
<input type="checkbox"/>	Occupancy 2	Shared Occupancy CET	Type of Work 2	Shared TypeOfWork CE
<input type="checkbox"/>	Occupancy 3	Shared Occupancy CET	Type of Work 3	Shared TypeOfWork CE
<input type="checkbox"/>	Occupancy 4	Shared Occupancy CET	Type of Work 4	Shared TypeOfWork CE
<input type="checkbox"/>	Occupancy 5	Shared Occupancy CET	Type of Work 5	Shared TypeOfWork CE
<input type="checkbox"/>	Occupancy 6	Shared Occupancy CET	Type of Work 6	Shared TypeOfWork CE
<input type="checkbox"/>	Occupancy 7	Shared Occupancy CET	Type of Work 7	Shared TypeOfWork CE
<input type="checkbox"/>	Occupancy 8	Shared Occupancy CET	Type of Work 8	Shared TypeOfWork CE
<input type="checkbox"/>	Occupancy 9	Shared Occupancy CET	Type of Work 9	Shared TypeOfWork CE
<input type="checkbox"/>	Occupancy 10	Shared Occupancy CET	Type of Work 10	Shared TypeOfWork CE
<input checked="" type="checkbox"/>	Calculated Value 1	SHARED_OCCUPANCY	Type of Work 5	Shared TypeOfWork CE

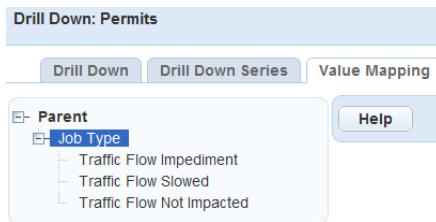
Assigning Values to a Custom Fields Drill-Down Series

The Value Mapping tab for a drill-down enables the data values in the Child Column/Field to be mapped to the Parent Column/Field data values. The Value Mapping tab for a Custom List drill-down enables the data values in the Child Column/Field to be mapped to the Parent Column/Field data values. You define the data values with shared drop-down lists. The nodes in this level depend on your selections in the Drill Down Series tab. When you create the drill-down field or the drill-down table, all of the values from the shared drop-down list display in the Value Mapping tab, which enables you to use duplicate Child values for multiple Parent criteria. For example, two categories, such as "condominium" and "single-dwelling," could potentially drill down into the same subcategories of demolition, remodel, and stick-built. An administrator can select "demolition," "remodel," and "stick-built" as subcategories of both categories. For more information about shared drop-down lists, see [Creating Shared Drop-down Lists](#).

To assign values to a Custom Fields Drill Down Series

- Access the Custom Fields Drill-Down portlet ([Accessing the Custom Fields Drill-Down Portlet](#)).
- Click the link to the drill-down you want to work with.
- Go to the **Value Mapping** tab.

Civic Platform displays the series order.



4. Click the plus (+) sign in the picker, then click the Parent Custom Field or List item.
Civic Platform displays a secondary portlet.

The screenshot shows the same 'Drill Down: Permits' interface, but now a secondary portlet is open on the right. The title of the portlet is 'Parent Column/Field Value: Traffic Flow Impediment'. It contains two buttons: 'Submit' and 'Help'. Below the title, it says 'Child Column/Field: 401-600 Amps'. A section titled 'Child Values' lists five options: 'Citizen', 'Staff', 'Government Official', 'Law Enforcement Officer', and 'Unknown', each with a checkbox next to it.

5. Select the value(s) you want to apply to the drill down, and then click **Submit**.
6. Click the plus (+) sign in the picker, then click the Child Column/Field item.
Civic Platform displays the shared drop-down values.
7. Select the values you want to provide for users to choose from when they navigate the drill down.
8. Click **Submit**.

Enabling Drill-Downs to Display

Administrators must complete some configuration to enable the drill-downs to display for the user. These steps include:

- Setting three FIDs
- Defining the Custom Fields groups and subgroups in Civic Platform Classic Admin.
- Setting user security permissions for the Custom Fields group or Custom Lists group to Full Access
- Creating or editing shared drop-down lists
- Creating or editing Custom Field or Custom List drill-down records.

You associate a Custom Fields group with the field or list in the application. To specify the application to apply the drill-down to, you must associate the Custom Fields or Lists with the record type. The shared drop-down lists contain the values for the drill-downs.



Note: As soon as you associate a Custom Fields group with a Custom Fields drill-down, the drill-down displays on the application and in the record, even if you have not assigned values to it yet. You can set the drill-down's record status to Inactive while you are working on it and then change the status to Active when it's ready.

If Custom Fields security settings block users from viewing the fields or lists for a record type, the drill-downs assigned to that record type do not display for the user. Review these settings to ensure you set them correctly. For information about setting permissions for a Custom Field or Custom List, see [Setting Permissions for Custom Fields Groups and Custom Lists Groups](#).

Custom Fields and Lists drill-downs are available to both Civic Platform and Citizen Access users. For information about the additional steps required to configure this feature in ACA, see “Configuring ASI Table Drill-Downs” in the *Citizen Access Administrator Guide*.

To enable drill downs to display

1. Set the permissions for the Custom Fields or Lists group to Full Access.

For information about setting permissions for Custom Fields or Lists, see [Setting Permissions for Custom Fields Groups and Custom Lists Groups](#).

2. For Custom Fields drill-downs, create or edit the Custom Fields Group and Subgroup.

For Custom Lists drill downs, create or edit the Custom List Group and Subgroup.

3. Create or edit the shared drop-down lists with the values needed for the drill down.

For details on completing this task, see [Creating Shared Drop-down Lists](#).

4. Create or edit the Custom Fields or Custom Lists drill-down record.

For details on completing this task, see [Creating or Editing a Custom Fields Drill-Down](#) or [Creating or Editing a Custom Lists Drill-Down](#).

Setting Up Security Policies

Security policies enable you to control who has permission to access an object and to automate what happens next when an object type reaches a certain status.

For example, you can restrict access to a building permit application when its status is Plan Review by limiting users ability to schedule and result inspections while the application is in that status, and allowing them to only view the application. When the application status changes to Issued, users can schedule and result an inspection.

Click a topic title below for full details.

Related Information

[Adding Record Type Security](#)

[Adding or Editing Workflow Task Security](#)

[Adding or Editing Inspection Type Security](#)

[Adding or Editing an Inspection Default Value Policy](#)

[Adding or Editing Inspection Type and Status Security](#)

[Adding or Editing Condition Type Security](#)

[Setting Permissions for Custom Fields Groups and Custom Lists Groups](#)

[Adding or Editing Asset Type Security](#)

[Adding or Editing EDMS Type Security](#)

[Adding or Editing Contact Type Security](#)

[Managing Recipients in Administration Portlets](#)

[Configuring Session Time Out](#)

Adding Record Type Security

To set security on a record type in Civic Platform, you must first define each FID in the Standard Choice APPLICATION_TYPE_SECURITY_FID.

The record type security defined in Civic Platform also takes effect in Mobile Office. For example, if you set limitations on the status of a record type in Civic Platform, the limitations also apply to Mobile Office. Full access lets users view and modify the record status when creating or editing records from Mobile Office; Read-only access lets users only view the record status; and an access level of None lets users neither view nor update the record status.

The process to set limitations on record status is through FID 8141 Application Status setting and the record type security setting. The FID setting takes priority over the record type security. If you set FID 8141 Application Status to Read-only or None, Mobile Office adheres to the FID setting only. If you set FID 8141 Application Status to Full Access, Mobile Office adheres to the record type security based on these rules:

- If you assign different security levels to the record type and its record status, the permission set on the record status takes effect. Otherwise, inherit the permission set on the record type.
- If you assign multiple security levels to an Application Status (user group, module, or agency, user group), the security setting assigned to the user group takes effect.
- If you assign different security levels to the Application Status functional area at the same level (user group, module, or agency), the maximum permission takes effect.

**Note:**

If multiple security policies apply to an individual user, the security policy assigned to the user group determines the security level. For example, if an individual user is in a user group that has Full access but that user has only View access, the user security policy (View) applies.

Adding or Editing Workflow Task Security

The workflow task list displays only those tasks that the workflow supervisor can fully access, determined by workflow task security policies. No workflow tasks display if the supervisor has no access or only read access to those tasks.

You can limit access to a building permit application if the status is Plan Review by restricting users ability to schedule inspections and result inspections, and allowing them to only view the application. When the application status changes to Issued, users can schedule and result an inspection.

You can configure workflow task security in the Workflow Security portlet ([Navigating to the Setup Portlet](#)). For information on how to assign recipients to a workflow task, see [Managing Recipients in Administration Portlets](#).

Adding or Editing Inspection Type Security

You can establish three security levels for inspection types. Full access lets users add, modify, and delete inspections; Read-only access lets users only view inspections; and None lets users neither view nor change inspections.

Civic Platform uses the security settings for an inspection group or an inspection type if they are different from the agency inspection settings. If you assign security settings for both an inspection group and a security type within that group, the security settings for the inspection type take effect.

Note that Civic Platform assigns access to an inspection based on the specific inspection security settings. For example, if an inspection is read-only to a user or user group, then those users cannot modify, delete, or copy checklists assigned to the inspection.

The inspection type security defined in Civic Platform also takes effect in Mobile Office. For example, if you set an inspection type to No Access for a user group in Civic Platform, users of that group cannot view the details about the inspections of that inspection type in Mobile Office. The inspection type is not available in any Inspection Type drop-down list either.

You can configure inspection type security in the Inspection Type Security portlet ([Navigating to the Setup Portlet](#)). For information on how to assign recipients to an inspection type, see [Managing Recipients in Administration Portlets](#).

Adding or Editing an Inspection Default Value Policy

To add or edit inspection default value policy

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
 2. Navigate to **Agency Profile > Security Policy**.
- Civic Platform displays the Agency Security Policies-Select Policy page.

[Agency Security Policies](#)

[Policy - Select Policy](#)

[**Application Type Security**](#)

[**Workflow Task Security**](#)

[**Inspection Type Security**](#)

[**Inspection Default Value Policy**](#)

[**Inspection Type and Status Security**](#)

[**Condition Type Security**](#)

[**EDMS Access Security**](#)

[**External User Policy**](#)

3. Click **Inspection Default Value Policy.**

Civic Platform displays the Inspection Group Select screen.

[Agency Security Policies](#)

[Policy - Inspection Default Value Policy](#)

Select an Inspection Group for this policy

Inspection Group:

Submit **Cancel**

4. If you know the inspection group you want to work with, enter it in the Inspection Group field; otherwise, leave the field blank.

5. Click **Submit.**

Civic Platform displays the Inspection Group list.

[Agency Security Policies](#)

[Policy - Inspection Default Value Policy](#)

Select an Inspection Group for this policy

Inspection Group

[All Inspection Groups](#)

[BLD Commercial](#)

[BLD Demolition](#)

[BLD Electrical Comm](#)

[BLD Electrical Res](#)

[BLD Mechanical Comm](#)

[BLD Mechanical Res](#)

[BLD Plumbing Comm](#)

[BLD Plumbing Res](#)

[BLD Pool](#)

[BLD Residential](#)

[BLD Sign](#)

[Case Management General](#)

[Enforcement General](#)

[License General](#)

[Service Request General](#)

Cancel

6. Click the link for the inspection group you want to work with. To assign security settings for all inspection groups, click the **All Inspection Groups link.**

Civic Platform displays the Inspection Type list.

Agency Security Policies

Policy - Inspection Default Value Policy

Select an Inspection Type for this policy

Inspection Group: BLD Commercial

Inspection Type

[All Inspection Types](#)

[Building Final](#)

[Fire Final](#)

[Floor Deck](#)

[Footings & Forms](#)

[Foundation](#)

[Frame](#)

[Health Final](#)

[Partial/Temp Building Final](#)

[Progress Check](#)

[Roof Deck](#)

[Rough Frame](#)

[Sanitary Sewer Final](#)

[Set Backs](#)

[Storm Sewer Final](#)

[Storm Water Quality Final](#)

[Temp Power](#)

[Zoning Final](#)

◀ Pages: 1 ▶

[Cancel](#)

- Click the link for the inspection type you want to work with. To assign security settings for the entire inspection group, click the **All Inspection Types** link.

Civic Platform displays the security policy for the inspection type.

Agency Security Policies

Policy - Inspection Default Value Policy

Scope - Agency or User Group

Inspection Group/Inspection Type: BLD Commercial/

Agency or Group Name	Default Status for New Inspection	Number of Calendar Days Available to Schedule Inspections	Allow Same Day Inspection Scheduling	Inspection Cutoff Time	Status
<input type="text"/>	<input type="text"/> Pending <input type="button"/>	<input type="text"/> 30 <input type="button"/>	<input type="checkbox"/>	<input type="text"/> 3 <input type="button"/> 00 <input type="button"/> <input checked="" type="radio"/> am <input type="radio"/> pm <input type="button"/> <input type="text"/> Enable <input type="button"/>	<input type="button"/> Add
<input type="button"/> Save <input type="button"/> Cancel					

- To add a new agency or a new group, select from the drop-down list the Agency or Group Name whose access level you want to specify.
- Choose the Default Status for all new inspections assigned to the inspection group and inspection type.
- Enter the Number of Calendar Days Available (from 1 to 90) for a public user to schedule an inspection. The default value is 30.



Note:

To enable this feature, you must configure the inspection blockout calendar. For more information, see [Setting Up Inspection Calendars for Public Users](#).

- Select Allow Same Day Inspection Scheduling, to enable users to schedule inspections on the same day they create the application.
- Enter the Cutoff Time after which users cannot schedule the inspection for the following day.
- Select Enable from the Status drop-down list if you want to activate this application type security; otherwise, select Disable.
- If this is a new policy, Click **Add**.

Civic Platform adds the security group to the list.

15.Click Save.

Civic Platform saves the security policy.

Adding or Editing Inspection Type and Status Security

If your agency uses Accela Wireless, you might set a code enforcement inspector's inspection status to Schedule. This lets code inspectors schedule, inspect, and record the results for a broken gas or water line immediately, instead of having to wait for someone else to schedule the inspection.

To establish an inspection type and status security policy

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Agency Profile > Security Policy**.
Civic Platform displays the Agency Security Policies—Select Policy page.
3. Click the **Inspection Type and Status Security** link.
Civic Platform displays the Inspection Group Select page.
4. If you know the inspection group you want to work with, enter it in the **Inspection Group** field; otherwise, leave the field blank.
5. Click **Submit**.
Civic Platform displays the Inspection Group list.
6. Click the link for the inspection type you want to work with. To assign security settings for all of the conditions, click the **All Inspection Groups** link.
Civic Platform displays the Agency Security Policies—Select page.
7. Click the inspection type you want to work with.
Civic Platform displays the Agency Security Policies—Scope page.
8. To add a new agency or a new group, select the agency name or group name whose access level you want to specify. Civic Platform uses the security settings for a user group if they are different from the agency security settings.
9. Select the Inspection Status for the agency and for the user group. Leave this field blank and select **Create** if you want to allow a group or user to create a new inspection. If you leave this field blank, it deactivates the other available options.
10. Select the access level for the group (Edit, View, or None).
11. Select Enable from the Status drop-down list if you want to activate this application type security; otherwise, select Disable.
12. If this is a new policy, Click **Add**.
Civic Platform adds the inspection default value policy to the agency and group.
13. Click **Save**.
Civic Platform saves the inspection default value policy.

Adding or Editing Condition Type Security

To add or edit condition type security

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Agency Profile > Security Policy**.
Civic Platform displays the Agency Security Policies—Select Policy page.
3. Click the **Condition Type Security** link.
Civic Platform displays the Condition Type Select page.
4. If you know the condition type you want to work with, enter it; otherwise, leave the field blank.
5. Click **Submit**.
Civic Platform displays the Condition Type list.
6. Click the link for the condition type you want to work with. To assign security settings for all the conditions, click the **All Condition Types** link.
Civic Platform displays the security policy for the condition type.
7. To add a new agency or a new group, select from the drop-down list the agency name or group name whose access level you want to specify.
8. Select the access level for the group (Full or Read-only).
9. Select Enable from the Status drop-down list if you want to activate this application type security; otherwise, select Disable.
10. If this is a new policy, Click **Add**.
11. Click **Save**.
Civic Platform saves the security policy.

Setting Permissions for Custom Fields Groups and Custom Lists Groups

1. Go to **Administration > Application > Custom Fields Security**.
2. Click the appropriate Custom Fields Group or Custom Lists Group, and then do one of the following:
3. To apply the permissions to all Custom Fields Groups or Custom Lists Groups, select the top level Custom Fields Group or Custom Lists Group.
4. To search for a Custom Field, click **Search** then enter the field name (up to 24 characters).
Civic Platform highlights in red all matched records through the entire ASI Security navigation tree.

The screenshot shows a navigation tree titled "ASI Group". Under "ASI Group", there are four main categories: "AMS_POTHOLE", "AMS_STANDARD", "BLD_COMM", and "GENERAL". The "GENERAL" category is currently selected and expanded, displaying a list of asset-related items such as Backflow Device, Building Height, Existing Use, Fire Sprinkler, Fire Sprinkler Type, Ground Floor Area, Irrigation Meter Size, Number of Stories, Occupancy Classification, Occupant Load, Proposed Use, Total Floor Area, Type of Construction, and Water Meter Size.

- Click the ASI Group or ASI Table Group to which you want to apply permissions.

Civic Platform displays the ASI Group or ASI Table Group in the permission detail portlet.

The screenshot shows a "Permission" detail portlet for the "POTHOLE DETAILS" subgroup. At the top, there are buttons for "Assign", "Submit", "Delete", and "Help". Below this is a table with three columns: "Type", "Access", and "Name". A single row is present, showing "Group" in the "Type" column, "Full" in the "Access" dropdown, and "Planning - Clerical" in the "Name" column.

Type	Access	Name
Group	Full	Planning - Clerical

- In the permission detail portlet, click or roll your mouse over **Assign**, and select an assignment option.

For more information, see [Managing Recipients in Administration Portlets](#).

Adding or Editing Asset Type Security

You can set the access level for asset types in the Asset Security portlet ([Accessing the Asset Security Portlet](#)). For more information, see [Managing Recipients in Administration Portlets](#).

Adding or Editing EDMS Type Security

You can set up authentication by site or by user. If you choose site authentication, you must also set up a site-wide user name and password. If you choose user authentication, users must enter their Civic Platform

credentials before they can perform the certain actions. If you do not set up any authentication, users can directly access the EDMS without logging in.

To add or edit EDMS type security

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Navigate to **Agency Profile > Security Policy**.

Civic Platform displays the Agency Security Policies—Select Policy page

[Agency Security Policies](#)

[Policy - Select Policy](#)

[Application Type Security](#)

[Workflow Task Security](#)

[Inspection Type Security](#)

[Inspection Default Value Policy](#)

[Inspection Type and Status Security](#)

[Condition Type Security](#)

[EDMS Access Security](#)

[External User Policy](#)

3. Click the **EDMS Access Security** link.

Civic Platform displays the EDMS Type Select page.

[Agency Security Policies](#)

[Policy - Condition Type Security](#)

Select a EDMS Type for this policy

[EDMS Name](#)

[ACCELA](#)

[ADS](#)

[Doc6.5](#)

[Document 5.3](#)

[SharePoint](#)

[Cancel](#)

4. Click the EDMS type you want to work with.

Civic Platform displays the EDMS Security window.

[Agency Security Policies](#)

[Policy - EDMS Security](#)

Scope - Agency, Module or User Group

EDMS Name: [ACCELA](#)

Agency, Module or Group Name	Upload	Download	View	Delete	Status	Default	Authentication	Username	Password	Action
SACRAMENTO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable <input type="button" value="▼"/>	<input type="checkbox"/>	None <input type="button" value="▼"/>	<input type="text"/>	<input type="text"/>	Delete
Module-Building	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable <input type="button" value="▼"/>	<input checked="" type="checkbox"/>	None <input type="button" value="▼"/>	<input type="text"/>	<input type="text"/>	Delete
Module-Licenses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable <input type="button" value="▼"/>	<input type="checkbox"/>	None <input type="button" value="▼"/>	<input type="text"/>	<input type="text"/>	Delete
AMS-AMSPublicUser	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable <input type="button" value="▼"/>	<input type="checkbox"/>	None <input type="button" value="▼"/>	<input type="text"/>	<input type="text"/>	Delete
Building-BuildingPublicUser	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable <input type="button" value="▼"/>	<input checked="" type="checkbox"/>	None <input type="button" value="▼"/>	<input type="text"/>	<input type="text"/>	Delete
Planning-PLN Daily	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable <input type="button" value="▼"/>	<input type="checkbox"/>	None <input type="button" value="▼"/>	<input type="text"/>	<input type="text"/>	Delete
Building-BLD - Wendy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Enable <input type="button" value="▼"/>	<input type="checkbox"/>	None <input type="button" value="▼"/>	<input type="text"/>	<input type="text"/>	Delete
Building-BLD-MeetingManagement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enable <input type="button" value="▼"/>	<input type="checkbox"/>	None <input type="button" value="▼"/>	<input type="text"/>	<input type="text"/>	Delete
	<input type="button" value="Add"/>									

[Save](#) [Cancel](#)

5. To add a new agency or a new group, select from the drop-down list the Agency or Group Name whose access level you want to specify.

6. Select any of the access levels you want the group to have (Upload, Download, View, and Delete). This functionality is also applicable to attachments in Citizen Access.
7. Select Enable from the Status drop-down list if you want to activate this application type security; otherwise, select Disable.
8. If you enable more than one EDMS security policy from the list, check the box next to the policy you want to set as the Default policy.

**Note:**

Add-on products that use GovXML (the legacy Accela GIS, Accela Wireless, and Accela IVR) store documents only in the default EDMS adapter.

9. Do one of the following:

- a. To prompt users to enter their user name and password when uploading a document, select the User option. The first time users receive this prompt to enter their user name and password, they can select the “Remember” option for their login credentials.
- b. To require users to enter credentials for EDMS authentication, select the Site option and enter the site credentials

10.If this is a new policy, Click **Add**.

11.Click **Save**.

Civic Platform saves the security policy.

Adding or Editing Contact Type Security

Civic Platform divides contacts into two categories: record contacts that users associate or manually add to records, and reference contacts that users work with from the Reference Contact portlet. You only need to define security for record contact types. If you go to the Contact Type Security portlet and expand the Record Contacts navigation tree node (see [Figure 17: Record Contact Type Setting Portlets](#)), you can view all the contact types that are “for transactions” or “for both” in the CONTACT TYPE Standard Choice. You can then select a contact type and establish the security levels for modules, user groups, and individual users.

Because reference contacts are reference data, which are generally accessible and shared in various transactions across departments, it is no longer necessary to define security for reference contact types.

In the Contact Type Setting portlet, you can limit the use of specific contact types by module and establish three security levels for each contact type configured in the CONTACT TYPE Standard Choice. [Table 57: Contact Type Security Levels](#) explains the security levels. Based on your Standard Choice configuration, security policies are effective in Civic Platform, Citizen Access, and/or Mobile Office.

Table 57: Contact Type Security Levels

Security Level	Description
Full	Users can view, add, modify, and delete the contacts of certain contact types. Users can search for records or contacts by certain contact types. Users can search for inspections by certain contact types (in Mobile Office only).

Security Level	Description
Read-Only	<p>Users can view the contacts of certain contact types but cannot add or modify the contacts of those types.</p> <p>Users can search for records or contacts by certain contact types.</p> <p>Users can search for inspections by certain contact types (in Mobile Office only).</p>
None	Users have no access to certain contact types and the contacts of those types.

By default, users have full access to all contact types from within all modules and the reference Contact portlet. If a contact type is available for multiple modules, then you can limit the use of the contact type by module through specifying the applicable module in the Contact Type Setting portlet. If some contact information is sensitive, then you can limit access to the sensitive information by setting Read-Only or None access for certain users in the Contact Type Setting portlet.

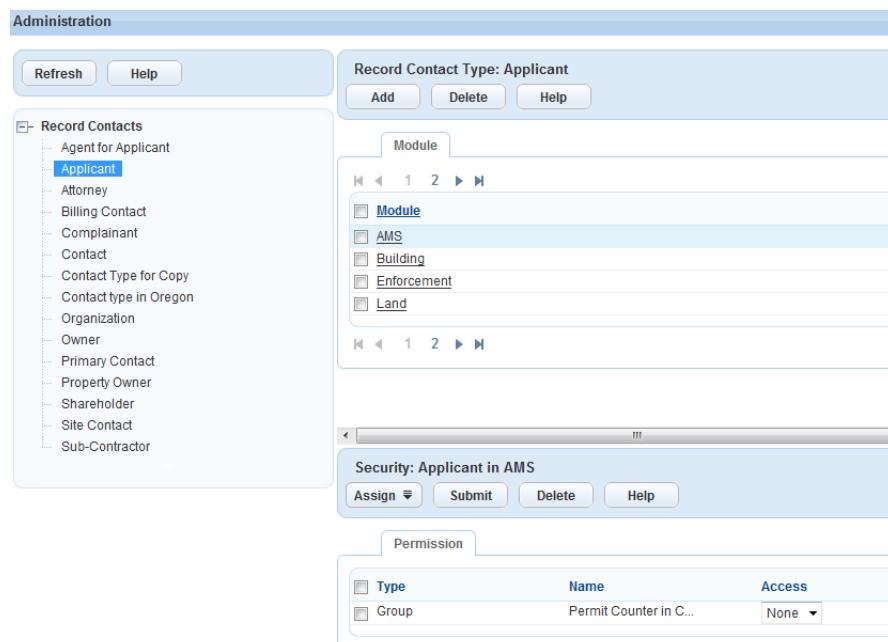
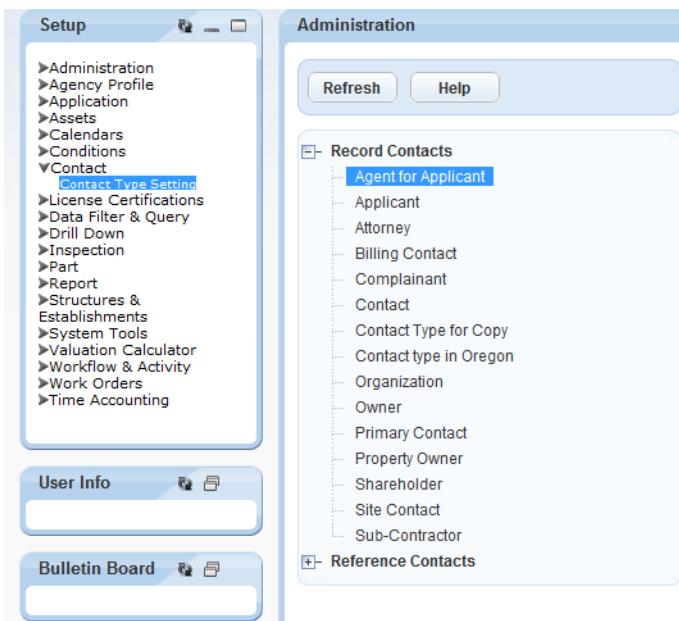


Figure 17: Record Contact Type Setting Portlets

To define security for record contact types

1. Access the Contact Type Setting portlet ([Accessing the Contact Type Setting Portlet](#)).
2. Click the plus sign (+) to the left of the **Record Contacts** node.
Civic Platform displays all available record contact types under the Record Contacts node.

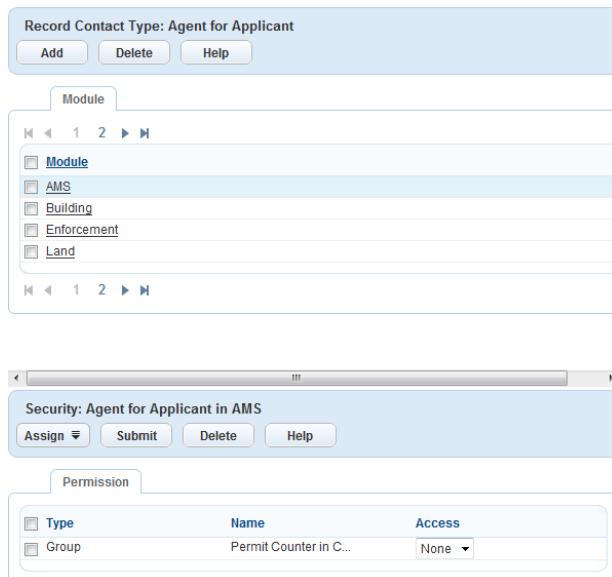


- Highlight the contact type to which you want to apply a security policy.
- Civic Platform displays the Module list for the contact type.

The screenshot shows the 'Administration' interface for managing contact types. The left sidebar shows the 'Record Contacts' tree, with 'Applicant' selected. The main panel has a title 'Record Contact Type: Applicant' with 'Add', 'Delete', and 'Help' buttons. A 'Module' tab is selected, showing a list of modules: 'Module', 'AMS', 'Building', 'Enforcement', and 'Land'. Below this is another 'Module' tab with the same list. The bottom section is titled 'Security: Applicant in AMS' with 'Assign', 'Submit', 'Delete', and 'Help' buttons. The 'Permission' tab is selected, displaying a table with two rows:

Type	Name	Access
Group	Permit Counter in C...	None

- Click the link to the module that you want to define security levels for.
- Click **Add**, select a module, and then click **Submit** to add the module to the Module list.
- Civic Platform displays the Permission list for the module.



- Click **Assign** and choose which level to apply the contact type security. You can select **Assign Module**, **Assign Group**, or **Assign User** from the drop-down menu.

Managing Recipients in Administration Portlets

Civic Platform provides a Recipient tab or a Permission tab in several administration portlets for you to assign permissions to the relevant administrative settings. For example, [Figure 18: Recipient Tab in Console Configuration](#) shows the Recipient tab in the Console Configuration portlet, [Figure 19: Permission Tab in Asset Type Security](#) shows the Permission tab in the Asset Type Security portlet. You can click the Assign buttons in either of the portlets to decide which agency, module, user group, and user has access to the current record.

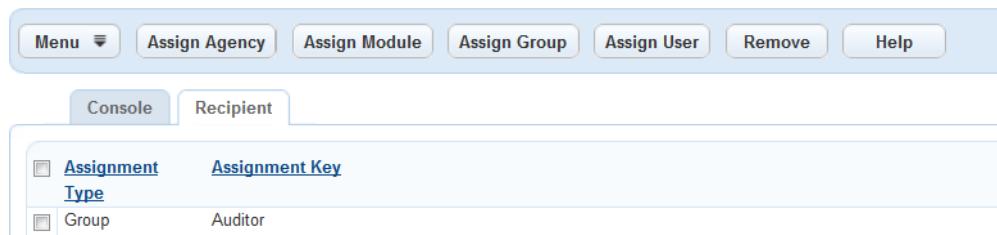


Figure 18: Recipient Tab in Console Configuration

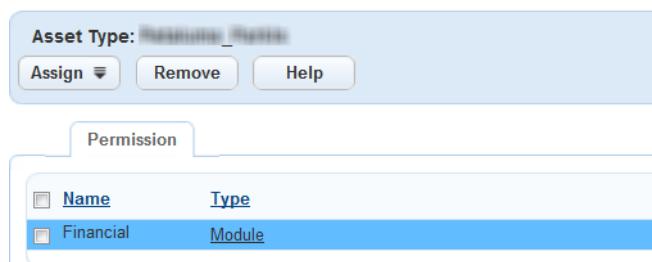


Figure 19: Permission Tab in Asset Type Security

This section provides instructions on how to assign recipients with the Assign buttons in the Recipient or Permission tab.

To manage recipients in an administration portlet

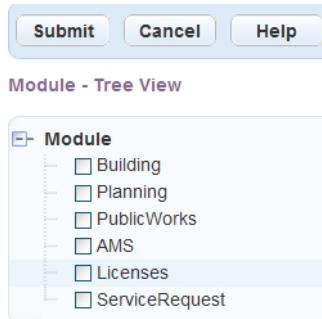
1. Go to an administrative portlet, and select a record in the portlet to which you want to assign recipient.
2. Click **Recipient** or **Permission** tab.
3. Click one of the following buttons to select which organization level you want to assign permission to the record.

 **Note:**

In different administration portlets, the availability of the buttons varies.

- **Assign Agency.** The entire agency has permission to the record.
- **Assign Module.** To select one or more modules. All users of the selected modules have permission to the record.
- **Assign Department.** To select one or more departments. All users of the selected department have permission to the record.
- **Assign Group.** To select one or more user groups. All users of the selected groups have permission to the record.
- **Assign User.** To select one or more users. All selected users have permission to the record.
- (In the Message administration portlet only) **Assign Role.** To select one or more public user groups, including registered users, anonymous users, and licensed professionals. All selected user groups have permission to the record.

Civic Platform displays a selection hierarchy, for example, the module-selection hierarchy.



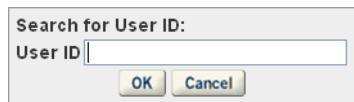
4. In most cases, you can search for a module, group, or user in the selection hierarchy.

To search for a module, group, or user, complete the following steps:

- a. Click the plus sign next to the Module, Group, or User label on the navigation tree.
Civic Platform expands the navigation tree to display names.

- b. Click **Search**.

Civic Platform displays a search page.



- c. Enter a value in the Search field. The user can enter a maximum of 24 characters.

d. Click OK.

Civic Platform highlights in red all matched records through the navigation tree.

The screenshot shows a navigation tree interface. At the top is a toolbar with buttons for Search, Submit, Cancel, and Help. Below the toolbar is a tree structure under the 'User' category. The 'Building' node is expanded, showing several sub-nodes. The 'BalintBuildingGroup' node is highlighted with a red border, indicating it is selected. Other nodes include 'BALINT', 'BLD - Wendy', 'BLD 311', 'BLD Accounting', 'BLD Accounting-Supv', 'BLD Admin', 'BLD Cashier', 'BLD Chief', 'BLD Citizen Admin', 'BLD Counter Tech', 'BLD Counter Tech-EPC', and 'BLD Counter Tech-Insp'. The entire tree structure is contained within a light blue border.

e. Select the module, user group, or user, and then click **Submit.**

5. Select a recipient.

Click plus (+) sign to expand folders in the hierarchy. Click minus (-) sign to collapse folders until you locate the recipient you want.

6. Click **Submit.**

Civic Platform adds the selected recipients for the current record.

7. If you are assigning recipients in the **Permission tab, specify the access level of the recipient from the **Access** drop-down list (full, read or read-only, none or no access).**

The screenshot shows the 'Permission' tab of a configuration screen. At the top is a toolbar with buttons for Assign, Submit, Delete, and Help. Below the toolbar is a table titled 'Permission'. The table has columns for 'Type', 'Name', and 'Access'. There are two rows: one for 'ContractsAdmin' (Group type) and one for 'ContractsPublicUser' (Group type). The 'Access' column for 'ContractsAdmin' has a dropdown menu open, showing the options 'None', 'Full', 'Read', and 'None'. The 'None' option is highlighted with a blue selection bar. The 'ContractsPublicUser' row also has a dropdown menu in the 'Access' column, but it is not visible in the screenshot.

Type	Name	Access
Group	ContractsAdmin	None
Group	ContractsPublicUser	Access

8. If you are assigning recipients in the **Permission tab to a record type, inspection type, or asset type, you have the options to configure more access options for the selected recipient. For example, configure the inspection status access to an inspection type.**

The screenshot shows a configuration page with the following sections:

- To be Defined**: A button.
- Submit**: A button.
- Help**: A button.
- Inspection Access**: A dropdown menu set to **None**.
- Inspection Status Access**: Three dropdown menus labeled **APPROVED**, **DENIED**, and **PENDING**, each set to **--Select--**.

9. Click **Submit.**

Civic Platform saves the access settings.

10. If you need to remove a recipient from the recipient list, select the recipient you want to delete and click **Delete.**

Configuring Session Time Out

Accela administrators can configure their system to time out after a period of inactivity, to minimize security risks. You can specify the maximum amount of time that a Civic Platform session can remain idle before it ends automatically, requiring the user to re-enter their login credentials. You can also configure a warning dialog box to display, enabling the user to

By default, the time-out setting is 7200 seconds (2 hours). You can adjust the session time-out value (in seconds) by configuring the Standard Choice SESSION_TIMEOUT at the agency level or by editing the XPolicy.csv file at the Web server level. If both the Standard Choice SESSION_TIMEOUT and the XPolicy.csv file specify the session time-out value, the session time-out setting at the agency level overrides that at the server level. If the Standard Choice does not specify a session time-out value, Civic Platform enforces the time-out setting configured in the XPolicy.csv file.

The minimum time-out value is 10 minutes (600 seconds). If you specify a value less than 600 seconds, Civic Platform automatically enforces a session time-out period of 10 minutes.

To configure the session time-out value at the Web server level

1. On the server where you host Civic Platform, open the XPolicy.csv file.
2. Locate the sso.session.timeout property in the LEVEL_DATA column.
3. Enter a value greater than 600 in the DATA1 column next to the sso.session.timeout property.
4. Save the file.

To configure the session time-out value at the agency level

1. Log in to Civic Platform.
2. Configure the Standard Choice SESSION_TIMEOUT by adding the value Timeout, with a value description of any number greater than 600. This value is the number of seconds of inactivity after which Civic Platform times out.

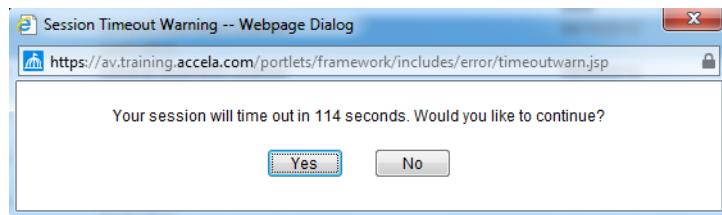
For example, if you want Civic Platform to time out after 15 minutes, set the value description to 900. The default is 7200 (2 hours).

Refer to “Standard Choices,” in the Accela Civic Platform Configuration Reference for complete details on setting up Standard Choices.

3. Click **Update**.
4. Clear the cache:
 - a. Navigate to the Cache List portlet.
 - b. Click Clear Cache.
 - c. Select the Cache Name option at the top of the page to select all cache items.
 - d. Click Clear.

Session Time Out Warning

Accela administrators can configure a session time-out warning that displays notifying users that the session is about to expire. Users can select Yes in the time-out warning to continue their session or No to allow their session to expire, as shown in the sample screen below:



To configure a session time-out warning

1. Log in to Civic Platform.
2. Configure the Standard Choice SESSION_TIMEOUT by adding the value Timeout Warning with a value description of the number second prior to timing out Civic Platform displays the time out warning. For example, if you enter a value description of 300 the time-out warning displays to the user 5 minutes before the session times out. The default value is 120 (2 minutes). The Timeout Warning value must be less than the time out value.
Refer to “Standard Choices,” in the Accela Civic Platform Configuration Reference for complete details on setting up Standard Choices.
3. Click **Update**.
4. Clear the cache:
 - a. Navigate to the Cache List portlet.
 - b. Click Clear Cache.
 - c. Select the Cache Name option at the top of the page to select all cache items.
 - d. Click Clear.

Defining Sequences, Masks, and Autonumbering

This section provides details about numbering sequences and masks, and how to apply them to any item in Civic Platform that requires numbering, such as application types, invoices, and receipts.

Using the sequence generator you can define masks for numbered items. A mask in Civic Platform determines how a number displays to a user. For example, each new permit number might have a prefix indicating the type of permit and a date code in addition to the incremental number. A citation number can have a prefix that identifies it as a citation and not a permit, receipt number, or other incremental record in Civic Platform. After the initial implementation, you rarely need to modify masks.

Click a topic title below for full details.

Related Information

[Accessing the Sequence Generator](#)

[Setting Up Number Sequences and Masks](#)

[Managing Sequence Intervals and Last Number Used](#)

[Understanding Recommended Mask Formats](#)

Accessing the Sequence Generator

You can access the sequence generator portlets from the setup administration menu.

To view the sequence generator portlets

1. Go to **Civic Platform Administration > System Tools > Sequence Generator**.

Civic Platform displays the portlet.

Name*	Cache Size*	Interval Type
<input type="text"/>	1	Calendar Year
Sequence Type*	Start Value *	Increment By *
-Select-	1	1
Reset Value *	Reset Action	Status
<input type="text"/>	Exception	Enabled
Description		
<input type="text"/>		

Setting Up Number Sequences and Masks

This section explains how to define a Sequence Definition. We provide instructions for Mask Definitions and provide examples for sequence numbering and formatted output of a sequence (how the result displays to the user).

Civic Platform divides all Sequence Definitions into three elements, the Sequence Definition, the Mask Definition, and the Sequence Intervals.

You must define the Sequence Definition before you can assign it to a Mask Definition.

Civic Platform organizes sequence types into several categories: Agency, Asset ID, Record ID, Record Key, Partial Record ID, Temporary Record ID, and Receipt. For each category there is a pre-defined setting that you can use without further configuration. It is ready to use immediately.

You can refer to [Table 60: Pre-Defined Sequences and Masks](#). This table lists each default sequence type, mask name, sequence definition name, and a description of the default sequence types.

To create or modify a sequence

1. Access the Sequence Definition portlet ([Navigating to the Setup Portlet](#)).

2. To define a number sequence, do one of the following:

- Create a new sequence for the item by right-clicking it from the navigation tree, then select **New Sequence**. You can also click the Menu button and select New Sequence from the drop-down list.

The sequence Name displays in the Sequence Definition portlet to the right.

Civic Platform organizes the items you can apply numbering to into several categories: Agency, Asset ID, Record ID, Partial Record ID, Temporary Record ID, Record Key, and Receipt. Each category has a Default numbering definition that is ready to use immediately, with no configuration.

To review the pre-defined or Default settings refer to [Table 60: Pre-Defined Sequences and Masks](#).

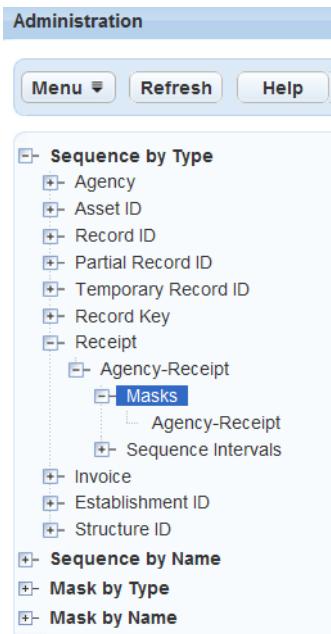
Sequence by Type organizes sequence definitions based on the sequence type: Agency, Asset ID, Record Id, Partial Record ID, Temporary Record Id, Record Key, and Receipt.

Sequence by Name lists the definitions based on the starting letter of the sequence definition name, and then by the sequence type.

Mask by Type organizes mask definitions based on the sequence type: Agency, Asset ID, Record Id, Partial Record ID, Temporary Record Id, Record Key, and Receipt.

Mask by Name lists the mask definitions based on the starting letter of the mask name, and then by the sequence type

- To locate an existing item in the navigation tree, click the plus sign (+) to the left of the sequence or mask type to expand the list of items.



3. Complete or update the Sequence Definition fields. For field descriptions refer to [Table 58: Sequence Definition Fields](#).

The screenshot shows the 'Sequence Definition' form. The 'Name*' field contains 'A'. The 'Sequence Type*' dropdown is set to '--Select--'. The 'Cache Size*' field is set to '1'. The 'Start Value *' field is set to '1'. The 'Reset Action' dropdown is set to 'Exception'. The 'Interval Type' dropdown is set to 'Calendar Year' with an 'Increment By *' of '1'. The 'Status' dropdown is set to 'Enabled'. The 'Description' text area is empty.

4. Click **Submit**.

Civic Platform saves the Sequence Definition.

5. Click **Refresh** in the Navigation Tree to display the sequence you just created or updated. Now, you can apply a Mask Definition to the item.

Civic Platform loads the new sequence type you created or updated in the Navigation Tree.

6. In the tree, locate the new or updated sequence and select (+) Masks.

The Mask Definition portlet displays to the right.

7. Complete the Mask Definition fields. For field descriptions refer to [Table 59: Mask Definition Fields](#).

8. Optionally, use the **Validate** button. It takes the Maximum and Minimum Length, Sequence Type, and Sequence Number Base and validates them against the mask Pattern using a sequence of 1 and today's date.

The screenshot shows the Civic Platform Administration interface. On the left, there's a sidebar with a tree view under 'Mask by Name' containing categories A through E, each with sub-options like Agency, Address Set ID, Record Key, and Receipt. The main panel is titled 'Sequence Definition' and contains several input fields:

- Name***: A text input field.
- Cache Size***: A numeric input field set to 1.
- Start Value ***: A numeric input field set to 1.
- Reset Action**: A dropdown menu currently set to 'Exception'.
- Description**: A text area for notes.
- Sequence Type***: A dropdown menu currently set to 'Select'.
- Interval Type**: A dropdown menu set to 'Calendar Year'.
- Increment By**: A numeric input field set to 1.
- Status**: A dropdown menu set to 'Enabled'.

9. Click Submit to save the Mask Definition.

Civic Platform automatically manage the Sequence Interval.

Table 58: Sequence Definition Fields

Cache Size	(Required) Enter the value to reflect how many of the numbers you want the sequence to pull or reserve at a time. The default value is 1. We recommend you do not change this value.
Description	Text for describing the pattern or any other characteristics of this sequence definition. Maximum of 200 characters.
Increment By	(Required) Enter the number that specifies the increase using a positive integer. Civic Platform does not support negative integers.
Interval Type	Select the type of interval for this sequence. Options are None, Calendar Year, Calendar Month, Calendar Day, Fiscal Year, Fiscal Quarter, Fiscal Month. The sequence value restarts based upon the interval type. For example, selecting Calendar Year means the sequence number resets itself to the Starting Value at the start of every calendar year. Select None if you do not want the sequence number to reset itself based upon a date.
Name	Enter a unique name for this sequence definition. It must be unique within the Sequence Type selected.
Reset Action	This field works in conjunction with the Reset Value. Reset Action tells the sequence generator what action to take if you exceed the Reset Value maximum. The default setting is Exception. You must configure Record Keys and Record IDs to throw an Exception. Note: If you exceed the Reset Value maximum and an Exception error displays, this is a very serious matter. Contact Accela Customer Support to resolve the issue. You might need to change the format. You must configure all categories to throw an exception, except the Agency sequence type. You should only use the other one (Set to minimum) if duplicate sequence numbers are acceptable. Do not configure the Set to minimum option unless you are certain that duplicate numbers are not a problem. Civic Platform stores many of the sequence numbers in database columns whose values must be unique. If you choose the Set To Minimum option, the sequence number resets to the Start Value if you exceed the Reset Value.
Reset Value	Enter the maximum value you want Civic Platform to generate from this sequence definition. When you exceed this maximum value the Reset Action triggers.

Sequence Type	Groups of related sequence definitions. The groups are: Asset ID, Invoice, Record ID, Partial Record ID, Temporary Record ID, Record Key, Receipt, and Agency. One exception to this grouping is the Agency type which groups all single definitions together. Each Sequence Type must have a unique Name. NOTE: When you create the Mask Definition for an item, first select the Sequence Type that is the same as the Sequence Definition. This filters the Sequence Definition Name drop-down, listing only the Sequence Definitions available for that Type. Then specify this Sequence Definition using the Table 59: Mask Definition Fields .
Start Value	Minimum starting value for the sequence.
Status	Enabled means you can use this definition. Set to Disabled if you no longer need to use this sequence definition. You cannot delete a sequence definition

Table 59: Mask Definition Fields

Description	Text for describing the pattern or any other characteristics of this mask. Maximum of 200 characters.
Maximum Length	Enter a numeric value that defines the total number of allowed characters for the item or for the formatted sequence output. For example, a receipt number, or a Record ID number. Agency can be different for a pre-defined mask.
Minimum Length	Enter the minimum number of characters for the formatted sequence output.
Name	The name that defines the sequence mask. Maximum of 200 characters.
Pattern	Mask pattern describes how Civic Platform formats the sequence output. You must consider several fields when creating a pattern: The Sequence Number Base field works with the pattern. To make the pattern human-readable apply Base10. To use a key or coded apply Base36. The Sequence Number Base (10 or 36) is in this part of the sequence output [\$\$SEQ\$\$.] The Reset Value and Interval Type in the Sequence Definition. See Recommended Patterns and Sequence Reset Values . Include the date value in the pattern of the Interval Type to prevent duplication of numbers.
Sequence Def Name	Select the sequence definition name for this mask to generate sequence numbers. You can only select a sequence definition from the drop-down list that is the same Sequence Type for the Mask Definition. You must define the Sequence Definition before you can assign it to a Mask Definition.
Sequence Number Base	Use Base 10 for user readable numbers. Use Base 36 to display the sequence output [\$\$SEQ\$\$] using numbers and letters [0-9] and [A-Z]. See examples of mask patterns using Base 10 and Base 36 in Table 61: Example Mask Patterns
Sequence Type	Select the category of the sequence. For example, Record ID or Receipt. You cannot mix Mask Definitions and Sequence Definitions with different Sequence Types. You also cannot assign a Record Key Mask Definition in place of a Record ID definition
Status	Enabled means you can use this definition. Set to Disabled if you no longer need to use this mask definition. You cannot delete a mask definition.

Managing Sequence Intervals and Last Number Used

Use the Sequence Interval portlets to either review the Interval Type and refer to the last number used in the sequence. Or, if absolutely necessary, to change the value of the next number used for this Sequence Definition.

Use the Sequence Interval portlets to either review the Interval Type and the last number used in the sequence. Or, if absolutely necessary, to change the value of the next number used for this Sequence Definition.

The Last Sequence Number field displays the last number used in the Sequence Interval. For example, if 15 is the value in the Last Sequence Number field for a Batch Invoice and the Increment is 1, and you enter 99 in the Last Sequence Number field, this forces the next Batch Invoice number to start with 100.

To review or change the Last Sequence Number value

1. Identify the item that you either need to review or change its last number used.
2. Highlight the Sequence Type in the navigation tree. For example, Agency > Batch Invoice, or Asset ID > Default.
The Masks and Sequence Intervals options display in the tree.
3. Expand the Sequence Intervals option.
The list of Sequence Intervals displays.
4. Select the Sequence Interval name you want to review or change in the Sequence Interval list portlet on the right.
5. Determine both the Increment By value for the item's Sequence Definition and what new number you want to apply to the numbering of the Sequence Interval. The Last Sequence Number field displays the last number used or applied to the item (from step 1) in Civic Platform.
6. Subtract from or add to the value, depending upon your numbering requirements, and enter it into the Last Sequence Number field.
7. Click **Submit** to update the interval numbering.

Understanding Recommended Mask Formats

This section provides supporting information when using the sequence generator. It repeats key sequence and mask concepts previously covered in this section. It also has several tables to refer to when defining the Pattern field in a Mask Definition. This information helps ensure the pattern you design meets your numbering requirements.

Topics

- [Understanding Masks](#)
- [Pre-defined Sequence Types and Masks](#)
- [Example Mask Patterns](#)
- [Common Date Formats](#)
- [Fiscal Date Formats](#)
- [Sequence Number Formats](#)
- [Miscellaneous Formats](#)
- [Receipt Variables for Receipt Masks](#)
- [Recommended Patterns and Sequence Reset Values](#)

Understanding Masks

You can apply masks to phone number and postal code fields to ensure that users enter these numbers in the appropriate format. For example, your agency might want to require users to include their country code with their phone number, or to require users to enter phone numbers as 888.555.1212 rather than 888-555-1212. If a user attempts to enter a number in another format, Civic Platform delivers an error message and asks them to reenter the number.

When creating masks, enter “0”s or “#”s in the positions where you want Civic Platform to accept any number or character. Civic Platform requires users to enter all characters in the expected format and position. For example, to create a format that forces users to enter a phone number in the format (800)555-1212 x.555, enter (000)000-0000 x.###.

Using the sequence generator you can define masks for numbered items. A mask in Civic Platform determines how a number displays to a user. For example, each new permit number might have a prefix indicating the type of permit and a date code in addition to the incremental number. A citation number can have a prefix that identifies it as a citation and not a permit, receipt number, or other incremental record in Civic Platform. After the initial implementation, you rarely need to modify masks.

When creating the pattern of the mask, be certain that you include the interval type within the sequence number. By including the interval type in the pattern ensures uniqueness. Without the interval type, you might introduce duplicates.

Mask Definitions can only reference a single Sequence Definition. You can have many mask definitions that point to the same sequence definition. This way, you can have multiple masks using the same number pool. For example, you might want to use a single number pool for all of the application types for the building module but have the mask display different information with that number. For example: you could name your Record ID Sequence Definition “Building” and then your mask definitions “Building-Residential” and “Building-Commercial” could reference Sequence Definition Building.

A mask pattern consists of a combination of variable substitutions and literal text. A pattern has one sequence number variable you can place anywhere in the pattern. All variables can appear in any position of the mask pattern. Enclose all variables in “\$\$” delimiters. For example, you write a sequence number variable as \$\$SEQ08\$\$. For example, a mask might contain CIT to indicate that the number is a citation number. This section details the various items that you can include in the pattern.

Sequence mask patterns return results in all uppercase.

All variable names are case-sensitive. For example \$\$MM\$\$ represents month data but \$\$mm\$\$ represents minutes data.

For the basic building blocks of masks, refer to [Example Mask Patterns](#).

The date patterns can represent year, month, day, day of year, hour, day of month, day of week. For a list of all mask pattern possibilities, refer to the [Common Date Formats](#).

With pattern masks, you can represent numbers as Base 10 (meaning each digit can be 0-9) or Base 36 (meaning each digit can be 0-9 or A-Z). For example, you can represent over 60 million different Record Keys from the same number pool (sequence interval) without conflict.

Example Record Key pattern \$\$yy\$\$BLD-00000-\$\$SEQ05\$\$ with a base of 36

Corresponding Record ID pattern \$\$yy\$\$BLD-\$\$SEQ08\$\$ with a base of 10

Pre-defined Sequence Types and Masks

[Pre-Defined Sequences and Masks](#) lists the predefined sequences and masks that come with Civic Platform. This section also explains how to locate the pre-defined sequences by the Default name in the navigation tree.

Table 60: Pre-Defined Sequences and Masks

Sequence Type	Mask Name	Mask Definition Name	Description	Best Practices
Agency > Batch Invoice	Batch Invoice	Batch Invoice	Special Purpose Agency Sequence. Batch Invoice definition is \$\$SEQ12\$ with the numbers displayed as base 10. Sequence Interval equals "None" which means it never resets based upon a date.	Use the default setting and do not modify the default.
Agency> Classic Citation Number	Classic Citation Number	Classic Citation Number	Special Purpose Agency Sequence. Classic Citation Number definition is \$\$SEQ19\$\$ with the numbers displayed as base 10. Sequence Interval equals "None" which means it never resets based upon a date.	Use the default setting and do not modify the default.
Agency > Invoice	Invoice	Invoice	Special Purpose Agency Sequence. Invoice definition is \$\$SEQ12\$\$ with the numbers displayed as base 10. Sequence Interval is equal to "None" which means it never resets based upon a date.	Use the default setting and do not modify the default.
Agency > Project Number	Project Number	Project Number	Special Purpose Agency Sequence. Project Number definition is \$\$SEQ19\$\$ with the numbers displayed as base 10. Sequence Interval is equal to "None" which means it never resets based upon a date.	Use the default setting and do not modify the default.
Agency >Set ID	< Set ID Masks are listed below>	Set ID	Special Purpose Agency Set ID Sequence Definition. Set ID defaults to a single Set ID shared by multiple Set Masks. You can modify each Set Mask to use a unique number pool. The Sequence Interval is equal to "Calendar Year" so it resets based upon a calendar year. Civic Platform uses this Set ID Sequence Definition for all of the different Set ID Masks, including Address Set ID, Record Set ID, Licensed Professional Set ID, Parcel Set ID, RandomAudit Set ID, and Set of Sets ID.	Use default setting.
Address Set ID	Set ID		The Record Set ID Mask Pattern is \$yy\$\$-SET-\$SEQ05\$\$ with a base of 10. Civic Platform shares the Set ID Sequence Definition with the other Set ID masks.	Use default setting.

Sequence Type	Mask Name	Mask Definition Name	Description	Best Practices
	Record Set ID	Set ID	The Record Set ID Mask Pattern is \$yy\$\$-SET-\$SEQ05\$\$ with a base of 10. Civic Platform shares the Set ID Sequence Definition with the other Set ID masks.	Use default setting.
Licensed Professional Set ID	Set ID		The Licensed Professional Set ID Mask Pattern is \$\$yy\$\$-LP-\$SEQ05\$ with a base of 10. Civic Platform shares the Set ID Sequence Definition with the other Set ID masks.	Use default setting.
Parcel Set ID	Set ID		The Parcel Set ID Mask Pattern is \$yy\$\$-PARCEL-\$SEQ05\$\$ with a base of 10. Civic Platform shares the Set ID Sequence Definition with the other Set ID masks.	Use default setting.
Set of Sets ID	Set ID		The Set of Sets ID Mask Pattern is \$yy\$\$-SETS-\$SEQ05\$\$ with a base of 10. Civic Platform shares the Set ID Sequence Definition with the other Set ID masks.	Use default setting.
Asset ID > Default	Default	Default	The Default Mask Pattern for the Asset ID is \$\$SEQ015\$\$ with a base of 10. The Sequence Interval Type is equal to None and the Sequence Name is "N" which means it never resets based upon a date.	Use default setting.
Invoice	Agency-Invoice	Agency-Invoice	Agency Invoice Sequence. Agency-Invoice definition is \$\$SEQ12\$\$ with the numbers displayed as base 10. The Sequence Interval is equal to "None" which means it never resets based upon a date (the agency default if you do not set up any custom receipts).	Use the default setting and do not modify the default.

Sequence Type	Mask Name	Mask Definition Name	Description	Best Practices
Invoice	POS-Invoice <module>	POS-Invoice <module>	<p>Agency Invoice Module.</p> <p>Point of Sale invoice module masks can follow the pattern in your agency's accounting system. The Mask Definition and Sequence Definition that applies to a POS invoice is equal to "POS-Invoice-<module>."</p> <p>This configuration enables you to identify what department or group to associate with the Point of Sale (POS) invoice. For example, replace <module> with a department name such as "POS-Invoice-Building." You must create invoice sequences and mask definitions before you can use the point of sale features.</p> <p>The Sequence Interval Type is equal to Calendar Year and the Sequence Name is "CYyyyy" where yyyy reflects the year in four digits so it resets based upon a calendar year.</p>	Configure Point of Sale Invoice the same as any other custom invoice.
Record ID	Default	Default	<p>The Record ID Default can handle over 60,000,000 unique keys every year. The Mask Pattern is \$\$yy\$ \$Record-00000-\$SEQ05\$\$ with a base of 36 because it is a key.</p> <p>The Sequence Interval Type is equal to Calendar Year and the Sequence Name is "CYyyyy" where yyyy reflects the year in four digits so it resets based upon a calendar year.</p>	Use default setting.
Record Key	Default	Default	<p>The Record Key Default can handle over 60,000,000 unique keys every year. The Mask Pattern is \$\$yy\$ \$Record-00000-\$SEQ05\$\$ with a base of 36 because it is a key. The Sequence Interval Type is equal to Calendar Year and the Sequence Name is "CYyyyy" where yyyy reflects the year in four digits so it resets based upon a calendar year.</p>	Use default setting.
Record Key	Model Record	Model Record	<p>Special Purpose Record Key Sequence. You can have up to 9999 models defined each year in Civic Platform. The Defaultpattern is: \$\$yy\$ \$MDL-00000-\$SEQ04\$\$ The base is 10.</p>	Use the default setting and do not modify the default.

Sequence Type	Mask Name	Mask Definition Name	Description	Best Practices
Partial Record ID	Default	Default	<p>Special Purpose Record ID Sequence. The Default pattern is \$\$yy\$\$EST-\$SEQ06\$\$. The base is 10.</p> <p>The Sequence Interval Type is equal to Calendar Year and the Sequence Name is "CYyyyy" where yyyy reflects the year in four digits so it resets based upon a calendar year.</p>	Use the default setting and do not modify the default.
Temporary Record ID	Default	Default	<p>Special Purpose Record ID Sequence. The Default pattern is \$\$yy\$\$TMP-\$SEQ06\$\$. The base is 10.</p> <p>The Sequence Interval Type is equal to Calendar Year and the Sequence Name is "CYyyyy" where yyyy reflects the year in four digits so it resets based upon a calendar year.</p>	Use the default setting and do not modify the default.
Receipt	Agency-Receipt	Agency-Receipt	<p>Special Purpose Receipt Sequence. Agency-Receipt definition is \$SEQ12\$\$ with the numbers displayed as base 10. The Sequence Interval is equal to "None" which means it never resets based upon a date (the agency default if you do not define any custom receipts).</p>	Use the default setting and do not modify the default.
Receipt	POS-Receipt-<module>	POS-Receipt-<module>	<p>Special Purpose Receipt. Point of Sale receipt masks are for special purpose Receipts. The point of sale system uses this by getting the Mask Definition and/Sequence Definition named "POS-Receipt-<module>" where <module> is the name of the Point of Sale (POS) receipt that you are defining.</p> <p>For example, "POS-Receipt-Building." You must create receipt sequence and mask definitions before you can use a point of sale.</p> <p>The Sequence Interval Type is equal to Calendar Year and the Sequence Name is "CYyyyy" where yyyy reflects the year in four digits so it resets based upon a calendar year.</p>	Configure Point of Sale Receipts the same as any other custom receipt.

Sequence Type	Mask Name	Mask Definition Name	Description	Best Practices
Receipt	PP-Receipt	PP_RECEIPT_SEQ	Special Purpose Receipt. Payment Processing receipt masks are for special purpose Receipts. The Payment Processing system uses them by getting the Mask/Sequence Definition named "PP_RECEIPT_SEQ."	Configure Payment Processing Receipts the same as any other custom receipt.
Receipt	SET-Receipt <module>	SET RECEIPT SEQ	Special Purpose Receipt. Create Set receipt masks for special purpose Receipts. The Set/Sets system uses this by getting the Mask/Sequence Def named "SET_RECEIPT_SEQ."	Configure Set/Sets Receipts the same as any other custom receipt.
Receipt	POS-Invoice-<module>	POS-Invoice-<module>	Special Purpose Invoice. Create Point of Sale Invoice masks as a special purpose Invoice. The point of sale system uses them by getting the Mask/Sequence Def named "POS-Invoice-<module>" where <module> is the name of the Point of Sale (POS) invoices you are defining. For example, "POS-Invoice-Building."	Configure Point of Sale Invoices the same as any other custom receipt.

You can locate the Default settings by expanding the Sequence by Type in the navigation tree. Refer to illustrations highlighting Default examples of a default Sequence Definition and Mask Definition for the Asset ID.

[Default Mask Definition for Asset ID](#), highlights where to locate the Default Sequence Definition for the Asset.

The screenshot shows the 'Sequence Mask Definition' screen in the Administration module. On the left, a navigation tree under 'Sequence by Type' includes categories like Agency, Asset ID, Record ID, etc., with 'Asset ID' expanded to show 'Default', 'Masks', and 'Sequence Intervals'. The 'Default' node is selected. The main panel displays the 'Mask Def' tab of the 'Sequence Mask Definition' form. The 'Name*' field contains 'Default'. The 'Sequence Def Name*' dropdown is set to 'Default'. The 'Sequence Type*' dropdown is set to 'Asset ID'. The 'Pattern*' field contains '\$\$SEQ015\$\$'. The 'GUIDE' button is visible. The 'Sequence Number Base' dropdown is set to '10'. The 'Minimum Length*' field contains '1'. The 'Description' area contains 'Default Asset ID Mask'. Other fields include 'Cache Size*', 'Start Value*', 'Reset Value*', 'Reset Action', 'Interval Type', 'Increment By*', and 'Status' (set to 'Enabled').

Figure 20: Default Mask Definition for Asset ID

Default Sequence Definition for Asset ID, highlights the Default Mask Definition for the Asset ID.

The screenshot shows the 'Sequence Definition' screen in the Administration module. The left navigation tree is identical to Figure 20. The main panel displays the 'Sequence Def' tab of the 'Sequence Definition' form. The 'Name*' field contains 'Default'. The 'Sequence Type*' dropdown is set to 'Asset ID'. The 'Reset Value*' field contains '9999999999999'. The 'Cache Size*' field contains '1'. The 'Start Value*' field contains '1'. The 'Reset Action' dropdown is set to 'Exception'. The 'Interval Type' dropdown is set to 'None'. The 'Increment By*' field contains '1'. The 'Description' area contains 'Default Asset ID'. Other fields include 'Status' (set to 'Enabled').

Figure 21: Default Sequence Definition for Asset ID

Example Mask Patterns

Table 61: Example Mask Patterns

Sequence Type	Example	Output
Invoice	INV-\$yyyyMMddHH\$-\$SEQ08\$\$Base = 10 Reset Value = 99999999 (10^8 - 1)	REC-2010083116-00000003
Record ID	\$\$yyyy\$\$-\$SEQ07\$\$-RESBase = 10 (always recommended for Record ID) Reset Value = 99999999 (10^8 - 1)	2008-00000001-RES2008-00000021- RES2008-00000301-RES2008-00087601- RES
Record ID	LIC-\$yyyyMMddRANDOMZ06\$-\$SEQ##-####- ####\$Base = 10 Reset Value = 99999999 (10^9 - 1)	LIC-2008-9AD633-12-3456-789LIC- 2008-ZX8F3E-12-3456-789LIC- 2008-78934RT-12-3456-789LIC- 2008- K8J7D3D-12-3456-789

Sequence Type	Example	Output
Record Key	\$\$yy\$\$BLD-00000-\$\$SEQ05\$\$Base=36Reset Value = 60466175 (36^5 - 1) Note: In the pattern for new Record Key definitions, always use Base=36, Reset Value = 60466175 (36^5 - 1), and \$\$SEQ05\$	08BLD-00000-0000108BLD-00000-00A0108BLD-00000-0ZZ0108BLD-00000-ZA421
Record Key	\$\$yy\$\$BLD-00000-\$\$SEQ05\$\$Base = 10Reset Value = 99999 (10^5 - 1)	08BLD-00000-0000108BLD-00000-0001108BLD-00000-0043108BLD-00000-08801
Receipt	REC-\$\$CI\$\$-\$CDI\$\$-\$\$.yyyyMMddHH\$\$-\$\$.SEQ08\$\$Base = 10Reset Value = 99999999 (10^8 - 1)	REC-DC4-02-2008071416-00002423

Common Date Formats

Table 62: Common Date Formats

Description	Syntax	Example of Output (2008-07-14 4:22 pm)
Year (2 digit)	\$\$yy\$\$	08
Year (4 digit)	\$\$FY\$\$	2008
Month in Year	\$\$MM\$\$	7
Month in Year	\$\$MM\$\$	Jul
Week in Year	\$\$ww\$\$	28
Week in Month	\$\$W\$\$	2
Day in Year	\$\$DD\$\$	197
Day in Month	\$\$dd\$\$	14
Day of Week in month	\$\$F\$\$	1
Day of Week in month	\$\$EE\$\$	Mon
AM/PM	\$\$Accela Automation\$\$	PM
Hour in Day (0- 23)	\$\$HH\$\$	16(Example: 2008-07-14 0:22 -> 00)
Hour in Day (1 - 24)	\$\$kk\$\$	16(Example: 2008-07-14 0:22 -> 24)
You can combine Simple Date patterns into a single, more complex pattern.	\$\$yyMMdd\$\$	080714
You can combine Simple Date patterns into a single, more complex pattern.	\$\$yyMMM\$\$	08JUL
You can combine Simple Date patterns into a single, more complex pattern.	\$\$yyMMdd-HH\$\$	080714-16

Fiscal Date Formats

Civic Platform supports fiscal years that start on the first day of a calendar month.

Table 63: Fiscal Date Formats

Description	Syntax	Example of Output (2008-07-14 4:22 pm with Fiscal Year start = 07)
Fiscal Year (2 digit)	\$\$FY\$\$	09

Description	Syntax	Example of Output (2008-07-14 4:22 pm with Fiscal Year start = 07)
Fiscal Year (4 digit)	\$\$FYYY\$\$	2009
Fiscal Quarter (1 digit)	\$\$FQ\$\$	1
Fiscal Month/Period (2 digit)	\$\$FM\$\$	01

Sequence Number Formats

Table 64: Sequence Number Formats

Description	Syntax	Description	Example	Output
Sequence Number (Default)	\$\$SEQ\$\$	1-5 digits with valid digits determined by Sequence Number Base (2-36).	\$\$SEQ\$\$Base = 10 \$\$SEQ\$\$Base = 36	99909990 8Z2SDFZ9ZZ8
Sequence Number	\$\$SEQ[0]n\$\$	[0] Left Zero Fill if sequence does not require all n digits. n = maximum number of digits to display.	\$\$SEQ05\$\$Base = 10 \$\$SEQ5\$\$Base = 36	00009000 100083830000 19AZ10999A Z8888
Sequence Number (formatted number)	\$\$SEQ#####\$	Formatted Number. Starts with # or *. Each # represents one digit. Each * represents one hidden digit. Warning: Do not use hidden digits if the sequence numbers generated must be unique because doing so causes the mask definition to return duplicate sequences. Do not use this option for asset IDs, record keys, record IDs, or receipts for Civic Platform to function properly. Civic Platform treats any other character as literal text.	\$\$SEQ##-#####\$ \$Base = 10 \$\$SEQ##-###-##\$ \$Base = 10 \$\$SEQ****-##\$Base = 10	01-23456 01-234-56 *****-56
Sequence Number	\$\$SEQZ05\$\$	Legacy Record Key Sequence Format. Most significant digit is base 36 (valid values are [0-9][A-Z]). All other characters are base 10 (valid values are [0-9]).	\$\$SEQZ05\$\$	0000199999 A0000A9999 B0000Z9999

Miscellaneous Formats

Table 65: Miscellaneous Formats

Description	Syntax	Description	Example	Output
Literal Dollar Sign	\$\$DOLLAR\$\$	Text	\$\$DOLLAR\$\$	\$
Random Number (Default)	\$\$RANDOM\$\$	Creates from 1-5 random digits with values from [0-9].	\$\$RANDOM\$\$	9 90 990 9990

Description	Syntax	Description	Example	Output
Random Number	\$\$RANDOM[Z][0]n\$\$	Creates from 1-20 random digits with values from [0-9] (base 10) or [0-9] [[A-Z]] (base 36). [Z] set = base 36. If not set = base 10. [0] set = left zero fill to guarantee the exact number of digits. n = number of digits. Default=5, Min=1, Max=20.	\$\$RANDOMZ05\$\$\$ \$RANDOMZ9\$\$	ASD83 23NMJKF823L12L Z8M3829D2

Receipt Variables for Receipt Masks

The variables in [Receipt Variables for Receipt Masks](#) apply to receipt masks.

Table 66: Receipt Variables for Receipt Masks

Description	Syntax	Description	Example Output
Cash Drawer ID	\$\$CDI\$\$	Cashier Drawer ID. Use only for receipt sequences.	05
Cashier Workstation	\$\$CI\$\$	Cashier Workstation Information. Use only for receipt sequences	D42
Type Alias	\$\$RECTYPE-ALIAS\$\$	Record Type Alias. Use only for receipt sequences; does not work for PP-Receipt and SET-Receipt.	Facilities Condos
Group	\$\$RECTYPE-1\$\$	The first element of application type. Use only for receipt sequences but does not work for PP-Receipt and SET-Receipt.	Building
Type	\$\$RECTYPE-2\$\$	The second element of application type. Use only for receipt sequences but does not work for PP-Receipt and SET-Receipt.	Facilities
SubType	\$\$RECTYPE-3\$\$	The third element of application type. Use only for receipt sequences but does not work for PP-Receipt and SET-Receipt.	Remodel
Category	\$\$RECTYPE-4\$\$	The fourth element of application type. Use only for receipt sequences but does not work for PP-Receipt and SET-Receipt.	Condos
Module Name	\$\$RECTYPE-MODULE\$\$	The module name of application type. Use only for receipt sequences but does not work for PP-Receipt and SET-Receipt.	Building
Department Alias	\$\$DEPT-ALIAS\$\$	The department name of organization. Use only for receipt sequences.	Long Range
Bureau	\$\$DEPT-1\$\$	The first element of the organization level. Use only for receipt sequences.	DSD
Division	\$\$DEPT-2\$\$	The second element of the organization level. Use only for receipt sequences.	PLN
Section	\$\$DEPT-3\$\$	The third element of the organization level. Use only for receipt sequences.	NA
Group	\$\$DEPT-4\$\$	The fourth element of the organization level. Use only for receipt sequences.	Long Range

Description	Syntax	Description	Example Output
Office	\$\$DEPT-5\$\$	The fifth element of the organization level. Use only for receipt sequences.	NA
User Name	\$\$USERID\$\$	User Login ID. Use only for receipt sequences.	Admin

Invoice Variables for Invoice Masks

Table 67: Invoice Variables for Invoice Masks

Description	Syntax	Description	Example Output
Record Type Alias	\$\$RECTYPE-ALIAS\$\$	Record Type Alias.	Facilities Condos
Group	\$\$RECTYPE-1\$\$	The first element of application type.	Building
Type	\$\$RECTYPE-2\$\$	The second element of application type.	Facilities
SubType	\$\$RECTYPE-3\$\$	The third element of application type.	Remodel
Category	\$\$RECTYPE-4\$\$	The fourth element of application type.	Condos
Module Name	\$\$RECTYPE-MODULE \$\$	The module name of application type.	Building
Department Alias	\$\$DEPT-ALIAS\$\$	The department name of organization.	Long Range
Bureau	\$\$DEPT-1\$\$	The first element of the organization level.	DSD
Division	\$\$DEPT-2\$\$	The second element of the organization level.	PLN
Section	\$\$DEPT-3\$\$	The third element of the organization level.	NA
Group	\$\$DEPT-4\$\$	The fourth element of the organization level.	LONGRANG
Office	\$\$DEPT-5\$\$	The fifth element of the organization level.	NA
User Name	\$\$USERID\$\$	User Login ID.	Admin

Recommended Patterns and Sequence Reset Values

Table 68: Recommended Patterns and Sequence Reset Values

Mask Pattern	Base 10 Sequence Reset Value	Base 36 Sequence Reset Value
\$\$SEQ01\$\$	9	10^1-1
\$\$SEQ02\$\$	99	10^2-1
\$\$SEQ03\$\$	999	10^3-1
\$\$SEQ04\$\$	9999	10^4-1
\$\$SEQ05\$\$	99999	10^5-1
\$\$SEQ06\$\$	999999	10^6-1
\$\$SEQ07\$\$	9999999	10^7-1
\$\$SEQ08\$\$	99999999	10^8-1
\$\$SEQ09\$\$	999999999	10^9-1
\$\$SEQ10\$\$	9999999999	10^10-1
\$\$SEQ11\$\$	99999999999	10^11-1

Mask Pattern	Base 10 Sequence Reset Value	Base 36 Sequence Reset Value
\$\$SEQ012\$\$	999999999999	10^12-1
\$\$SEQ013\$\$	9999999999900	10^13-1
\$\$SEQ014\$\$	99999999999999	10^14-1
\$\$SEQ015\$\$	999999999999999	10^15-1
\$\$SEQ016\$\$	9999999999999999	10^16-1
\$\$SEQ017\$\$	99999999999999999	10^17-1
\$\$SEQ018\$\$	999999999999999999	10^18-1
\$\$SEQ019\$\$	9223372036854775807	2^63-1

Designing Workflows

A workflow is a set of tasks that your agency follows to process a record. Each record type has a specific workflow process that manages the individual records created by the users. A record moves through the workflow process as the users update the status of the workflow tasks.

Click a topic title below for full details.

Related Information

[Deciding Which Tool to Use](#)

[Workflow Redesign for Civic Platform's New User Interface](#)

[Working with Workflow Designer](#)

[Working with the Classic Workflow Tool](#)

[Creating Task Statuses](#)

[Configuring Agency-defined Fields for Workflows](#)

[Tracking In-possession Time for a Record](#)

[Configuring Automatic Email Messages](#)

[Managing Automatically Printed Reports](#)

[Assignments, Skillsets, and Workloads](#)

[Making Workflow Task Assignments](#)

[Managing Activities](#)

Deciding Which Tool to Use

Civic Platform provides two options for designing workflows: the Classic Workflow tool and Workflow Designer. You can view and edit workflows created in the Classic Workflow tool with Workflow Designer, and vice versa.

- [Working with the Classic Workflow Tool](#)

This tool provides standard workflow configuration styles based on the Classic Administration user interface. When designing the task relationships with the Classic Workflow tool, you must determine the position of each task in the workflow, and use proper phase numbers as indicators to the positions.

- [Working with Workflow Designer](#)

This tool is the next generation of workflow design. Workflow Designer provides a graphical user interface and is simpler and easier to use. Workflow Designer contains the same functionality as the Classic Workflow tool, but has the added benefit of letting you see a visual representation of your workflow while you design it.

The Classic Workflow tool enables you to save incomplete workflows, while Workflow Designer does not. When you attempt to open a partially designed workflow in Workflow Designer, an error message displays, and the workflow fails to load. In this case, you must open and edit the workflow in the Classic Workflow tool first.

Best practice is to create all your workflows in Workflow Designer, unless the features are unique to the Classic Workflow tool. See [Workflow Configuration: Which Tool to Use](#) for details.

Table 69: Workflow Configuration: Which Tool to Use

Workflow Configuration Task	Which Tool to Use	How to Access
Basic Workflow Configuration	Workflow Designer	Navigation path: V360 Administration > Administration > Workflow Designer Documentation: Working with Workflow Designer .
Basic Process Configuration		
Process Task Configuration		
Task Status		
Task Status' Email Setting		
Task's Proximity Alert		
Task specific-information definition	Classic Workflow	Navigation path: Classic Admin Tools > Workflow Documentation: Working with the Classic Workflow Tool .
Task Status' Report Setting		
Email Template		
Workflow Blockout	Classic Calendar administration	Navigation path: Classic Admin Tools > Calendar > Calendar
Task's Activity	Workflow and Activity administration	Navigation path: V360 Administration > Workflow and Activity Documentation: Adding or Editing Workflow Task Security and Configuring Record-Related Activities .
Workflow Security		
Task Standard Condition	Condition administration	Navigation path: V360 Administration > Conditions > Conditions Documentation: Setting Up Conditions .

Workflow Redesign for Civic Platform's New User Interface

Topics:

- [Overview](#)
- [Migrating to New Workflow Designer](#)
- [Enhanced Card Views](#)
- [Enhanced Workflow Designer Functionality](#)
- [Enhanced Display Order Control](#)

Overview

The new Workflow Designer offers a number of new features, a new look and feel, improved usability and additional customization options. In addition, Classic Workflow users can now prevent workflow incompatibility issues by adopting the new Workflow Designer available in the Civic Platform 9.0.0+ release.



Note: Classic Workflows (workflows created via Classic Administration) are not compatible with the new Workflow Designer. Accela strongly recommends users migrate old workflows to the new Workflow Designer in the 9.0.0+ release. Aside from the functionality advantages the new Workflow Designer provides, users that migrate away from Classic Workflow can prevent future compatibility issues that could arise as new features are developed. Please see the Migration Process section below for information on how to migrate from Classic Workflow to Workflow Designer.



Note: Use Internet Explorer for best results with Workflow Designer.

Migrating to New Workflow Designer

Workflows created in Classic Workflow cannot be edited in Workflow Designer because of configuration incompatibilities. Workflows created in Workflow Designer may lose their intended formatting and configurations when edited in Classic Workflow. As a result of these incompatibilities, Accela strongly recommends users upgrade to Workflow Designer in the 9.0.0+ release.

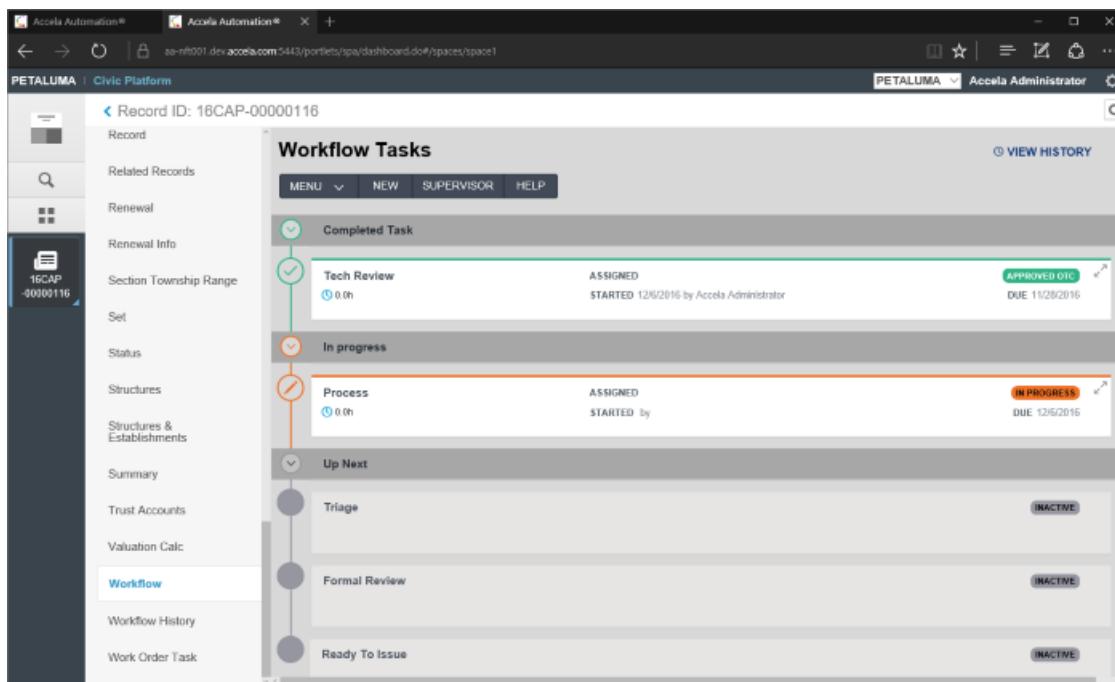
The migration process is straightforward, and [this Community article](#) provides a step-by-step walkthrough of the process.

Enhanced Card Views

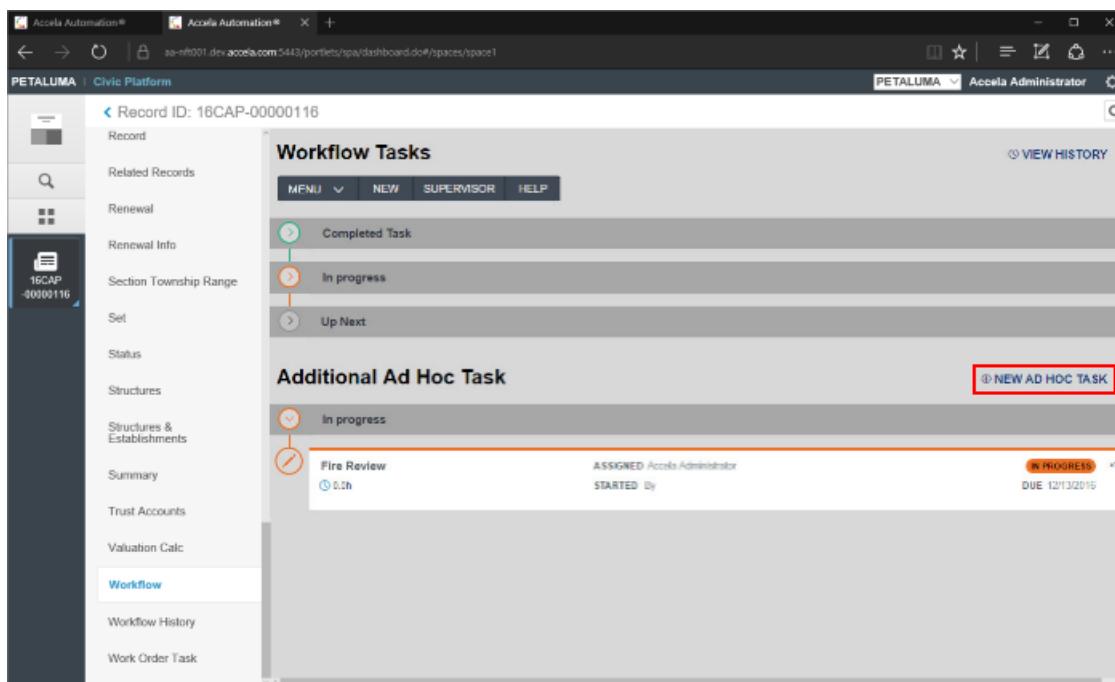
Summary Card View

The Summary Card View allows users to track the progress of an application throughout the workflow process. Users can easily access information for each step in the process and quickly see which steps are complete and incomplete, required and optional.

Each set of workflow tasks, Completed, In Progress and Up Next, can be collapsed in order to help the user focus on a specific task or set of tasks. The Completed and Up Next tasks will be collapsed by default. Users can quickly expand collapsed task sets and then expand the individual tasks that are most pertinent to their jobs. This puts important information, such as Task-specific information (TSI) or ad hoc processes, at the user's fingertips without presenting an overly detailed and distracting view of the entire workflow process.



Ad Hoc tasks will be displayed in the same manner, with Completed and In Progress tasks grouped together so they can be quickly collapsed or expanded. The method for creating an Ad Hoc task is unchanged in 9.0.0+. Simply click the New Ad Hoc Task link to add it to the workflow.



Detail Card View

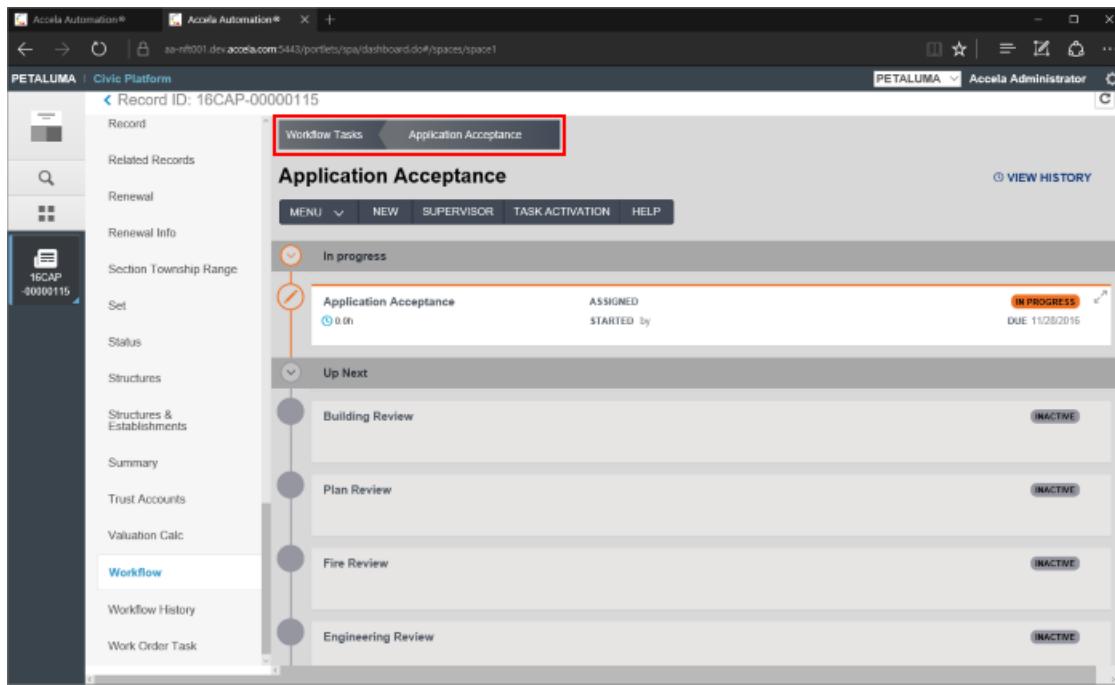
The Detail Card View allows users to see the detailed step information that is pertinent to a specific workflow task so they can track, update and move an application forward.

The screenshot shows the 'Workflow Tasks' page for a record ID of 16CAP-00000116. The main task is 'Process' (Status: IN PROGRESS). A collapsed area labeled 'Sub Tasks' is expanded, revealing several sub-tasks. The sub-task 'Application Acceptance' is highlighted with a red border.

If the task has been set up on the workflow to include sub tasks, they can be accessed by clicking the collapsed Sub Task area on the parent task.

The screenshot shows the 'Workflow Tasks' page for the same record ID. The sub-task 'Application Acceptance' is now fully visible, with its sub-tasks expanded. A red box highlights the expanded sub-task area.

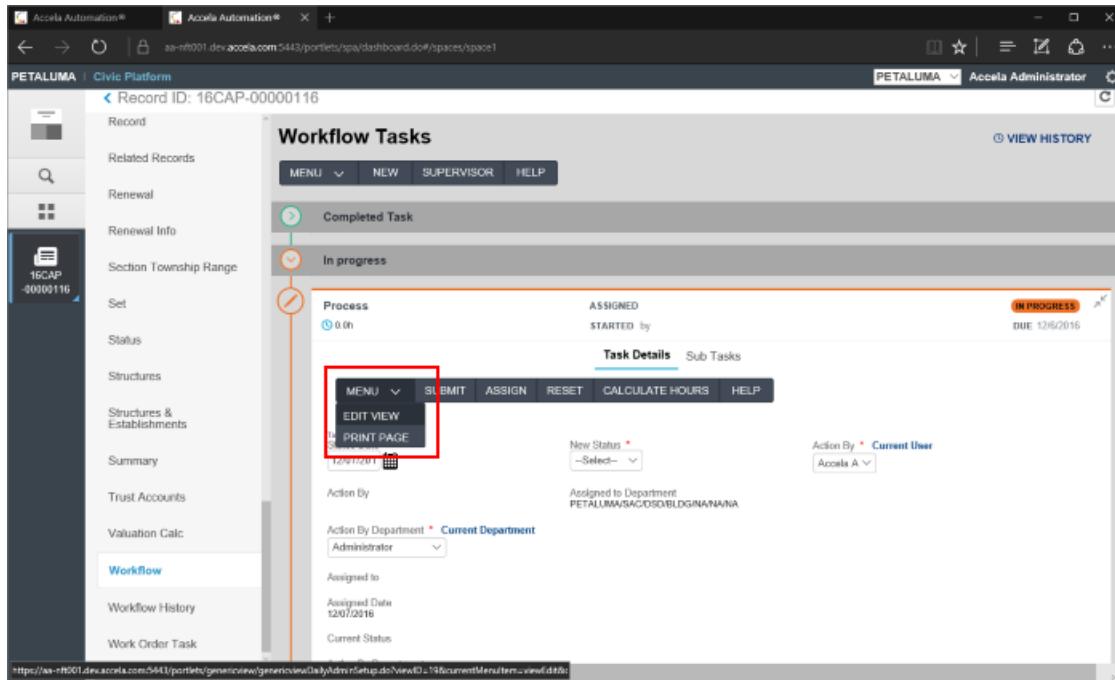
Sub tasks will be displayed just like standard tasks, with Completed, In Progress and Up Next task sets. To return to the parent task, click the Workflow Tasks breadcrumb link at the top of the page.



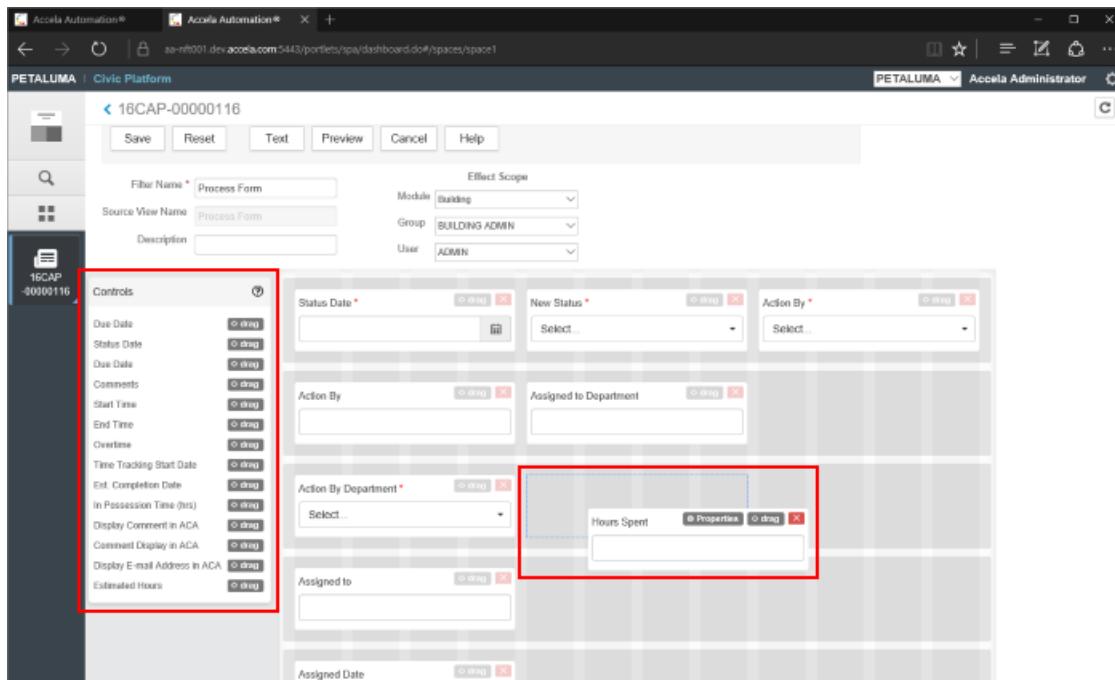
Enhanced Workflow Designer Functionality

Enhanced Task Customization

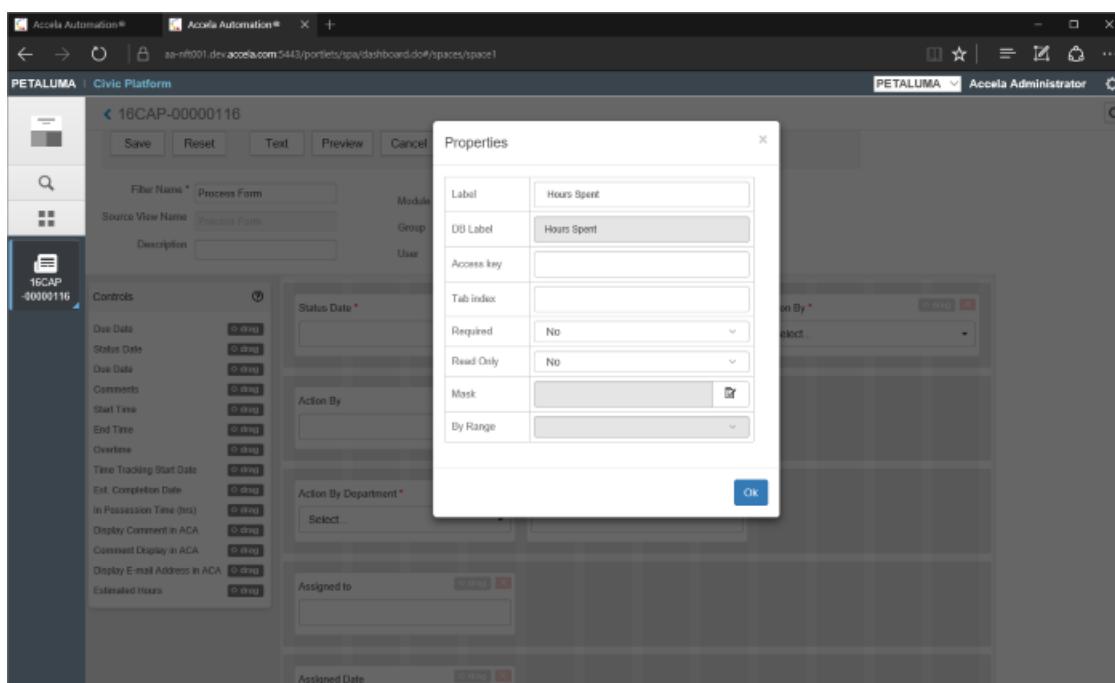
Agency Administrators can use the new Workflow Designer to easily configure individual tasks to meet the specific needs of a user group. Simply select **Edit View** from the Menu drop-down on the task to edit that task.



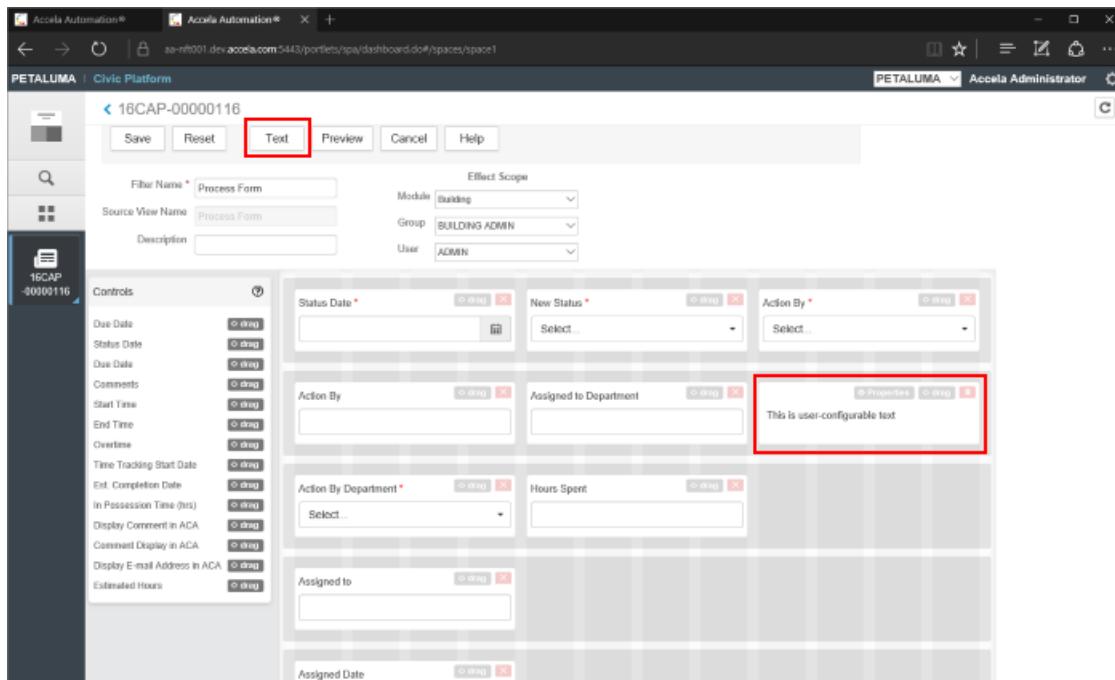
The new Workflow Designer is built on the Bootstrap 12-column grid system. This framework provides responsive output with easy-to-use snap to grid functionality. Users can select a field from the **Controls** box on the left and drag the field into the desired position on the grid. A dotted blue box will indicate where the field will snap into the grid. Once the field has been placed on the grid, the user can adjust the width accordingly.



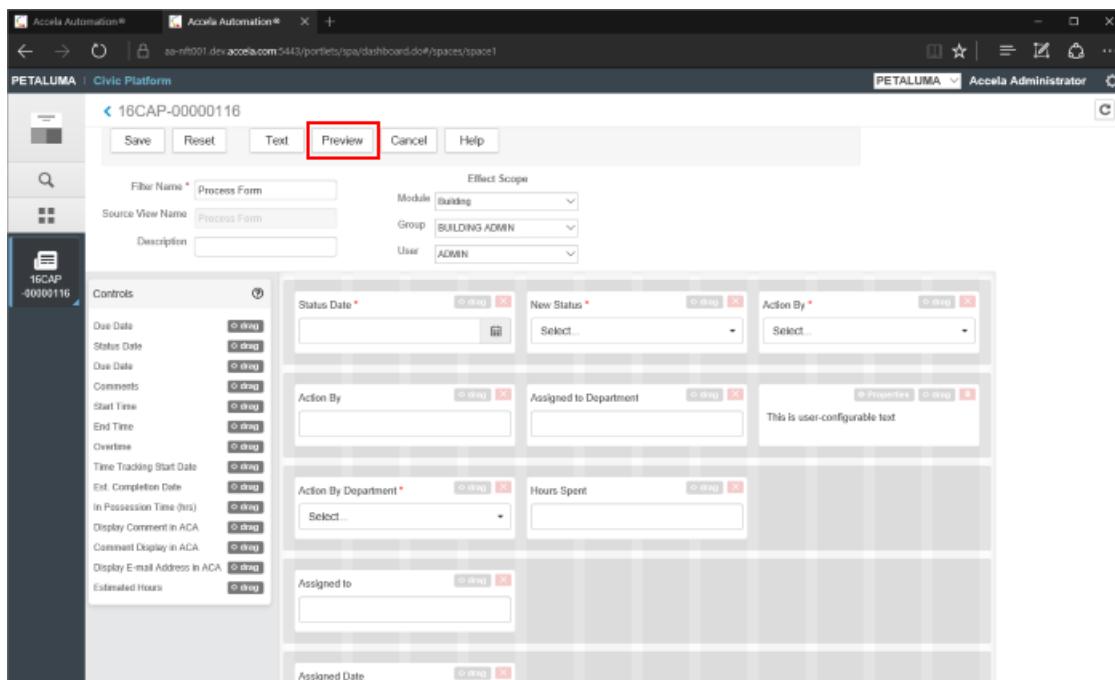
Once a field has been placed on the grid, the user can click the Properties button on the field container to open the field Properties window. Here users can customize field labels, input formatting and other details.



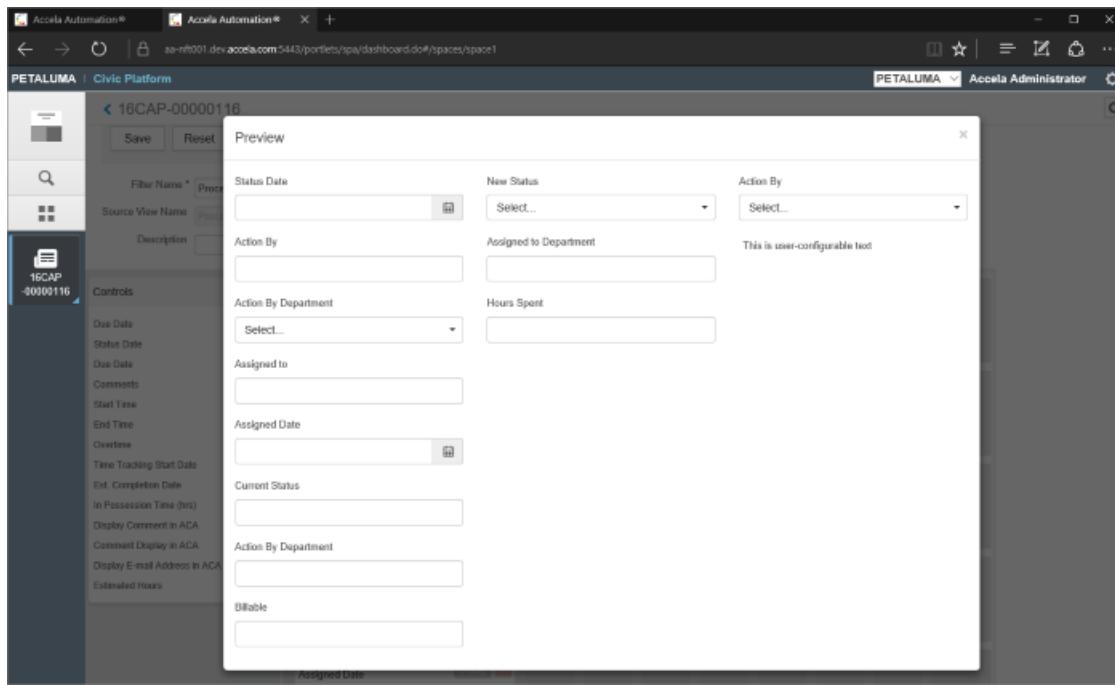
Users can also use the **Text** button on the task menu to create a static text field in the grid. This text field can be placed anywhere on the grid and edited to display user instructions, hyperlinks or other custom content.



The **Preview** button is used to preview the edited task.



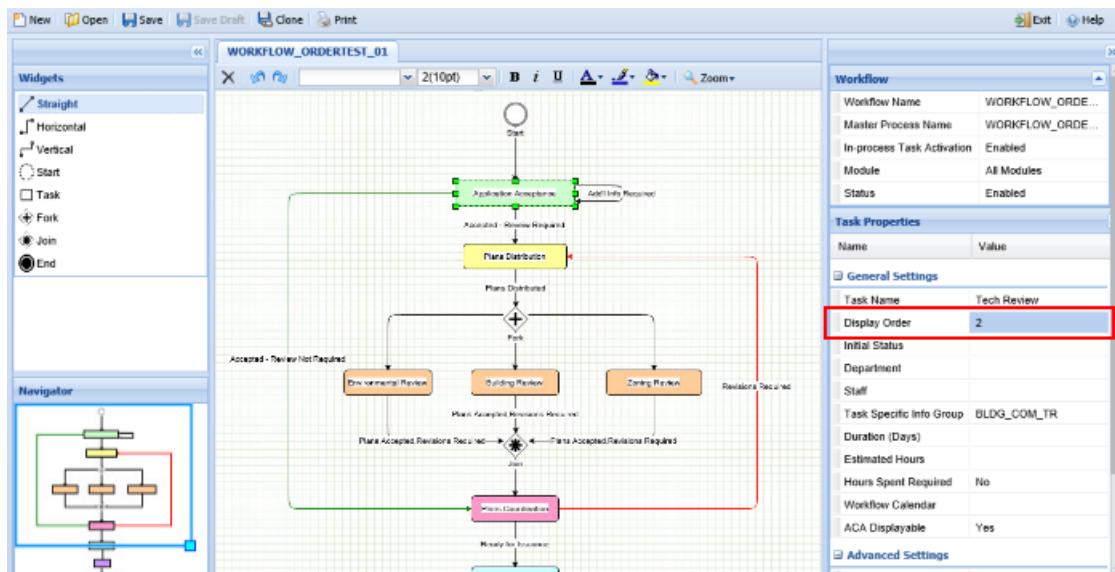
Clicking the Preview button opens the Task Preview window so users can confirm the task layout meets their needs.



Enhanced Display Order Control

The Display Order field has been added to the Workflow Designer Administration window in the 9.0.0+ release. This enhancement allows users to specify a display order for workflow tasks.

By selecting a workflow task and specifying a display order between 1 and 999, users can control how the task is displayed in the new Workflow Designer window. This will not affect the order in which the tasks must be completed, but only the order in which they are displayed. Users will find this useful when designing a workflow that includes multiple parallel tasks that can be processed concurrently, but when a specific display order makes sense.



Note: Users must reassign the workflow to the record after specifying the new Display Order in order for the tasks to display in the order specified.

Working with Workflow Designer

This section describes how to use Workflow Designer to create or edit a workflow, and how to design the process and sub processes in the workflow. This section also contains information on where you can view a video demonstration of creating workflows.

Topics

- [Opening Workflow Designer](#)
- [Creating a Workflow](#)
- [Designing the Workflow Process](#)
- [Editing a Workflow](#)
- [Cloning a Workflow](#)
- [The Workflow Designer Menu](#)
- [The Widgets Panel](#)
- [Workflow Properties](#)

Opening Workflow Designer

To open Workflow Designer

1. Navigate to the Administration portlet (see [Navigating to the Setup Portlet](#)).
2. From the Setup portlet, choose Administration > Workflow Designer.

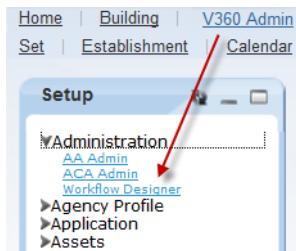


Figure 22: Sample Workflow shows Workflow Designer displaying a sample workflow.

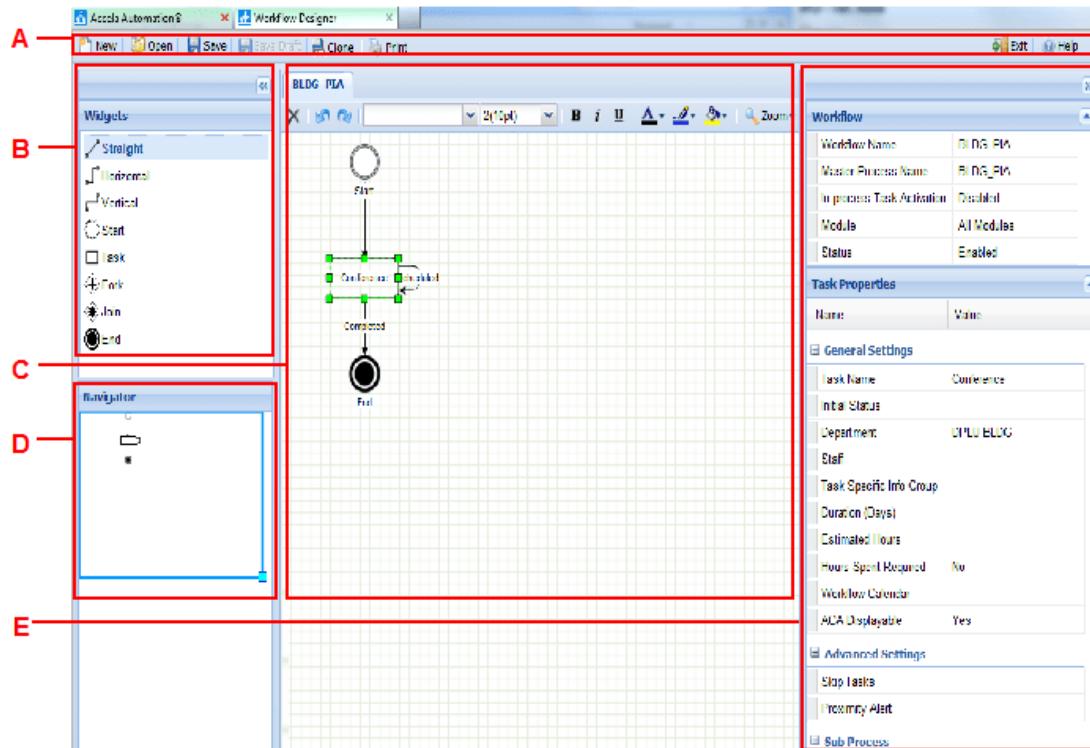


Figure 22: Sample Workflow

- A Workflow Designer Menu. Displays the New, Open, Save, Save Draft, Clone, Print, Exit and Help buttons.
- B Widgets Panel. This panel provides all the available widgets that you can add to a workflow process.
- C Workspace. The central panel provides the canvas for you to design workflow processes and sub processes. Only one workflow process can be open at one time. If the workflow process has several sub processes, the sub processes display in individual tabs.
- D Navigator Panel. This panel displays a thumbnail view of the design panel. You can drag the border of the outline in the panel to quickly change the view of the design panel.
- E Property Sheet. This property sheet provides a list of properties directly related to the workflow process or sub process displayed in the workspace, and the property settings of the widget (if any) that currently has focus.

Creating Workflows

Creating a Workflow

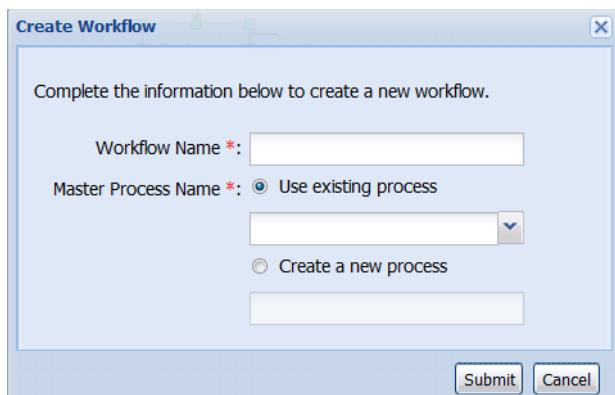
A best practice recommendation is to first plan out the design of your workflow on paper before you create it in Workflow Designer. Draw a diagram of your workflow on paper to help you identify all the tasks involved with a process, reduce oversights in your electronic version, and facilitate a thoughtful, well-designed workflow process.

To create a workflow

1. Navigate to the Administration portlet (see [Navigating to the Setup Portlet](#)).
2. From the Setup portlet, choose Administration > Workflow Designer.

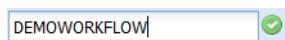
3. Click New.

The Create Workflow dialog box displays.



4. Enter a Workflow Name.

Workflow Designer validates the name and displays a check mark by the field to indicate successful validation.



5. You can either create a new master process for the workflow, or specify an existing process as the master process:

- To create a new process, click Create a New Process, then enter a process name.
- To specify an existing process, click Use Existing Process, then select a process.

If you create a workflow with an existing process, after you edit and save the process in the new workflow, Civic Platform updates the process in the other workflows associated with it.

6. Click Submit.

7. Design the workflow process as described in [Designing the Workflow Process](#).

8. Click Save when your workflow design is complete.

If you have not yet finished designing the workflow, click **Save Draft** before exiting Workflow Designer.

Designing the Workflow Process

Before you start designing a workflow process, it is best practice to understand all of the tasks you plan to include, what status a task must reach before its subsequent task can start, and how tasks relate to each other.

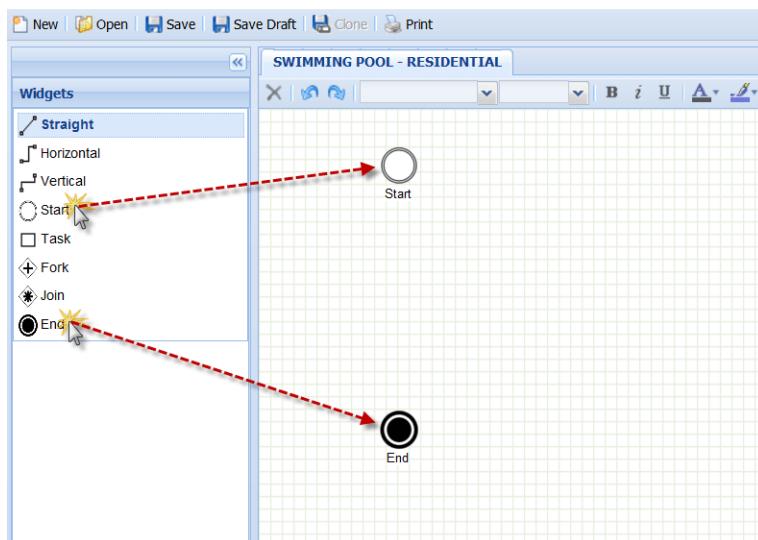
Workflow Designer does not allow you to save partially completed workflows, so make sure a workflow can meet all the following criteria before saving it:

- The workflow must have start nodes and end nodes.
- All of the nodes must connect with a flow widget.
- All of the connections (flows) must have a status.

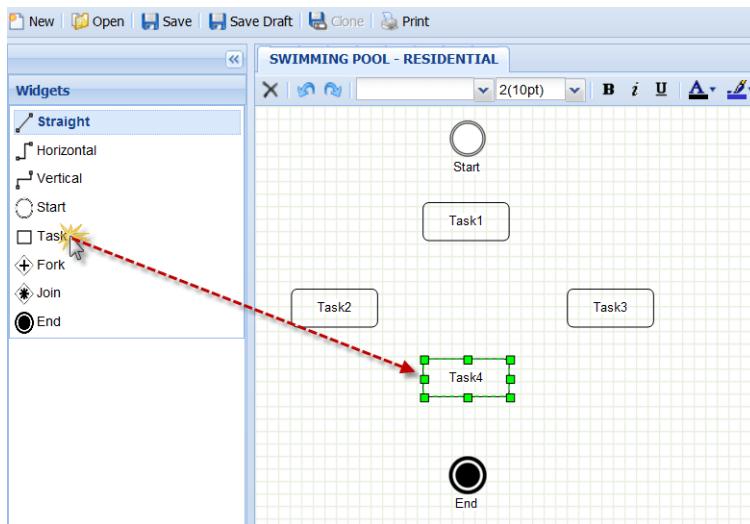
Troubleshooting Tip: A flow widget must start from a start, fork, join or a task widget, and it must end at a fork, join, task or an end widget. If a flow widget starts from a task widget, you must assign one or more task statuses to the flow widget. This way, the workflow process knows what status(es) a task must reach before its subsequent task(s) can start.

To design the workflow process

1. Complete steps 1-6 of the preceding topic, [Creating a Workflow](#).
2. From the Widgets panel, drag and drop a Start node and an End node onto your blank workspace. Simply click the node (Start, for example) then drag and drop it onto the workspace, leaving space between the nodes so you can enter details later, as show below. For descriptions of the widgets, see [The Widgets Panel](#).



3. From the Widgets panel, drag the workflow tasks onto the workspace.



4. To specify the task names, double-click the default task name (Task1, for example) and enter a name for your task.



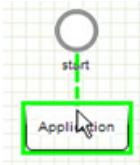
5. To connect two tasks, add a flow widget (Straight, Horizontal, or Vertical) as follows:

- a. From the Widgets panel, click the appropriate flow widget.
- b. Go to the workspace.

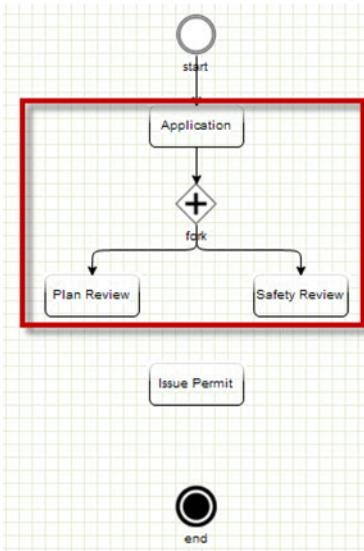
- c. Hover the mouse over the center of a task.
- d. Wait for the mouse cursor to change from an arrow to a hand:



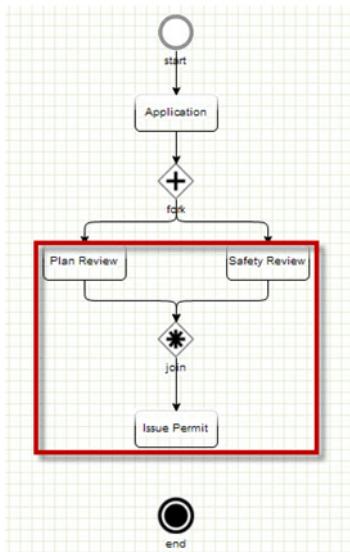
- e. Drag the cursor to the next task and then release the mouse button.



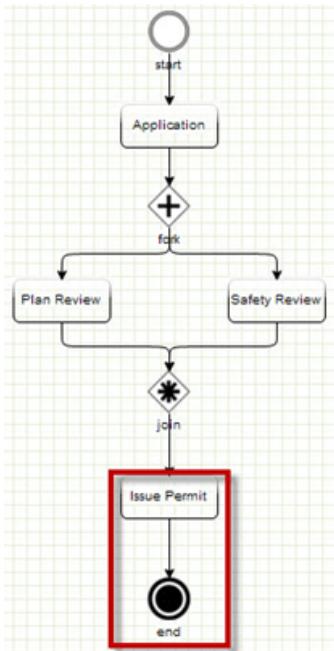
- 6. To connect one task to two or more parallel tasks:
 - a. From the Widgets panel, drag a Fork widget between the task and the parallel tasks.
 - b. From the Widgets panel, drag a Straight widget to connect the task to the fork node.
 - c. From the Widgets panel, drag a Vertical widget to connect the fork node to each parallel task.



- 7. To connect two or more parallel tasks to one task:
 - a. From the Widgets panel, drag a Join widget between the parallel tasks and the individual task.
 - b. From the Widgets panel, drag a Vertical widget to connect the parallel tasks to the join.
 - c. From the Widgets panel, drag a Straight widget to connect the join node to the next task.

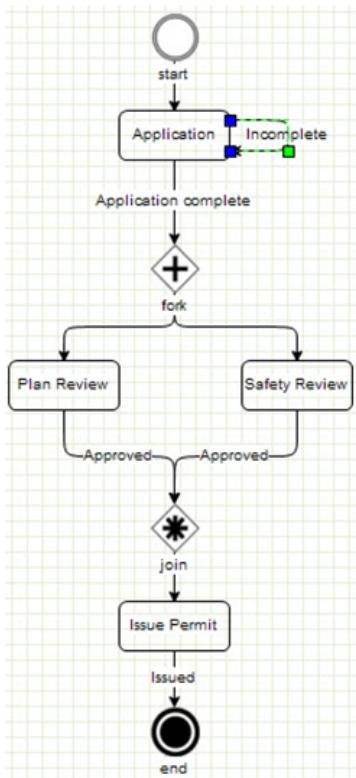


- 8.** After you connect all of the workflow tasks to each other, connect the last workflow task to the end node with the Straight flow widget.



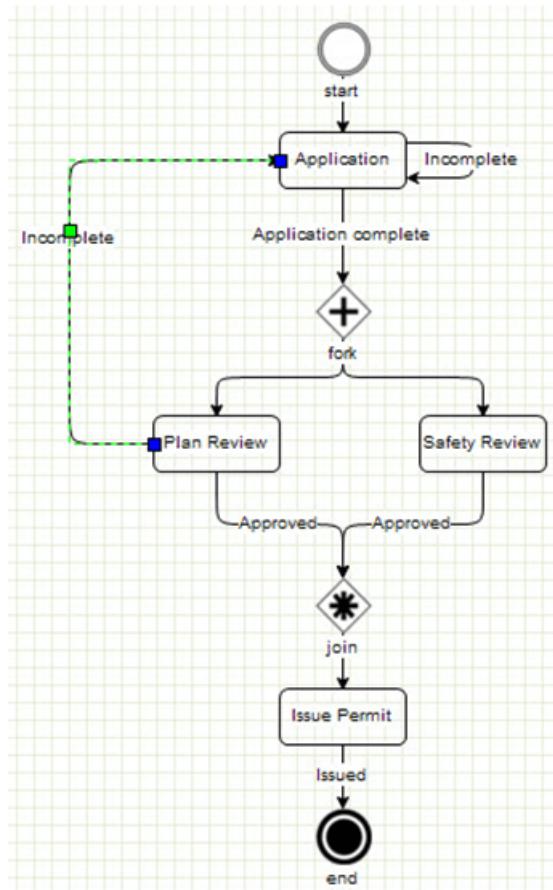
- 9.** To create a workflow status that keeps the workflow on the same task:

- From the Widgets panel, select Vertical.
- Hover your mouse over the task; start and end the connection on the same task.



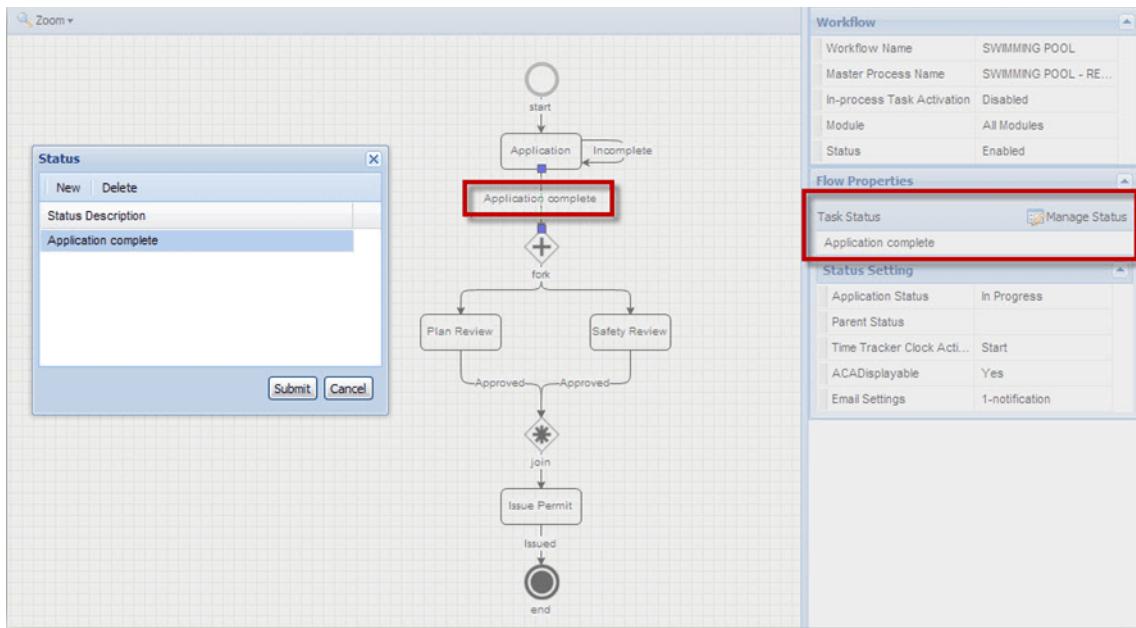
10. To create a workflow status that loops back to a previous task:

- From the Widgets panel, select Vertical.
- Hover your mouse over the task.
- Drag the connection back to a previous task.



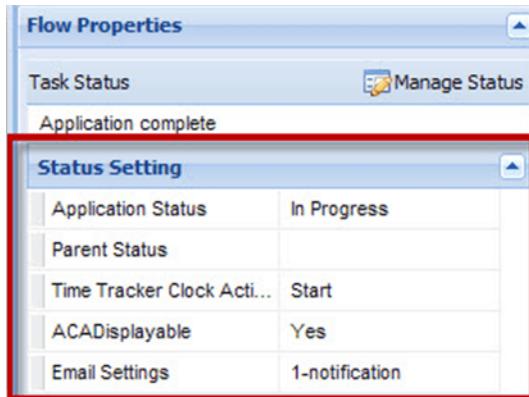
11. To add a task status:

- a. From the workspace panel, select a task connection.
- b. From the Flow Properties panel, click Manage Status.
- c. Click **New**.
- d. Enter the name of the status.
- e. Click **Submit**.



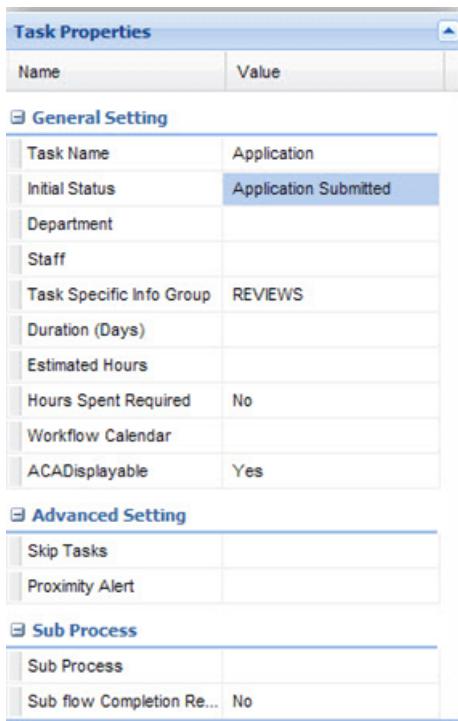
12.To define the status settings:

- Select a task connection.
- From the Flow Properties panel, click Manage Status.
- From the Status Setting panel, define the appropriate settings.



13.To set the **Workflow Properties** for a workflow task:

- From the workspace panel, select a task.
- From the Task Properties panel, set the properties for the task.



14. Click **Save** when your workflow design is complete.

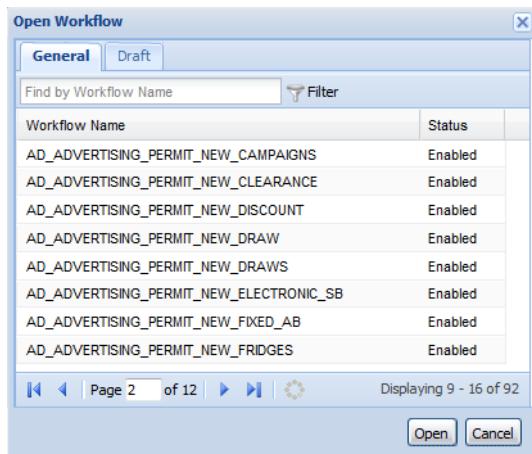
Editing a Workflow

Regardless of where you created a workflow, whether in the Classic Workflow tool or Workflow Designer, you can edit it in Workflow Designer.

To edit a workflow

1. Navigate to the Administration portlet (see [Navigating to the Setup Portlet](#)).
2. From the Setup portlet, choose Administration > Workflow Designer.
3. Click **Open**.

Workflow Designer displays the Open Workflow dialog with all the existing workflows in the General tab and all the draft workflows in the Draft tab. The existing workflows contain all the workflows configured in either Workflow Designer or the Classic Workflow tool.



4. Locate the workflow. In the General tab or the Draft tab, you can filter the workflows that display by:

- Entering text in the **Find by** field. You can then press **Enter** or click the **Filter** button to display only the workflows whose names start with the text.
- Clicking the page selection buttons to switch between pages.

5. Select the workflow.

6. Click **Open**.

Workflow Designer displays the message “Opening workflow, please wait...”

Troubleshooting Tip: If the selected workflow fails to load in Workflow Designer it might be a partially completed workflow created with the Classic Workflow tool. If this is the case you must return to the Classic Workflow tool, open the workflow there, and finish configuring the workflow before you can open it in Workflow Designer.

7. Edit the workflow tasks as appropriate to your business objectives.

8. Save the workflow.

Cloning a Workflow

You can clone a workflow that is currently open in the workspace.

To clone a workflow

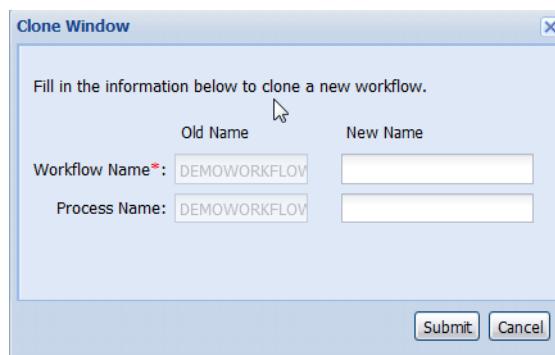
1. Navigate to the Administration portlet (see [Navigating to the Setup Portlet](#)).

2. From the Setup portlet, choose Administration > Workflow Designer.

3. Open a workflow.

4. Click **Clone**.

The Work Designer displays the Clone Workflow dialog.



5. Enter the new workflow name.

A warning sign displays if the new name is in use by an existing workflow or if the new name contains forbidden characters. You must change the name to dismiss the warning.

6. (Optional) Enter the new process name. If you do not enter a new process name, the cloned workflow inherits the process of the workflow you are cloning.

Workflow Designer opens the newly-cloned workflow process. The old workflow process automatically exits in its last-saved state.

7. Modify the workflow according to the objectives you want to achieve.

8. Click Save.



Note:

If you clone a workflow without saving it first, the newly-cloned workflow contains the changes since the last save, while the old workflow loses the changes.

The Workflow Designer Menu



Table 70: Workflow Designer Menu Items describes the buttons in the Workflow Designer menu.

Table 70: Workflow Designer Menu Items

Button Name	Description
New	Click this button to start the creation of a workflow.
Open	Click this button to display all the existing workflows (in the General tab) and draft workflows (in the Draft tab). You can select a workflow or a draft workflow to edit it in the workspace.
Save	Click this button to save the current workflow, its process and sub processes, and all its properties.
	<p> Note: You cannot save a workflow if the workflow does not pass validation.</p>
Save Draft	Click this button to save a new workflow as a draft before completing the design of the workflow process.
	<p> Note: The Save Draft function does not work for general workflows that you already saved successfully with complete process.</p>
Clone	Click this button to clone the current workflow.
	<p> Note: The Clone function does not work for draft workflows.</p>
Print	Click this button to open the current workflow process or sub process in print layout.
Exit	Click this button to exit Workflow Designer. Remember to click Save first to avoid losing any changes.
Help	Click this button to view instructions for using Workflow Designer.

The Widgets Panel

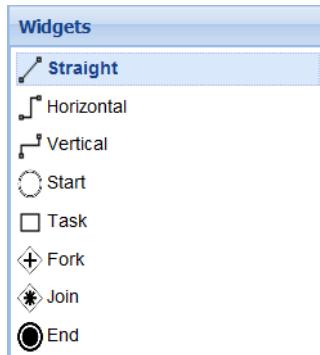


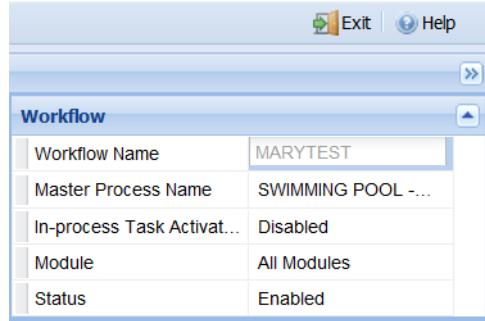
Table 71: Workflow Designer Widgets describes the set of widgets in the Workflow Designer menu that appears in the widgets panel. Each widget displays with a graphical icon that helps you identify it.

In the widgets panel, the straight, horizontal, and vertical widgets are flow widgets, and the start, task, fork, join and end widgets are node widgets.

Table 71: Workflow Designer Widgets

Widget Name	Description
Straight	Choose a flow widget (straight, horizontal or vertical) to connect two node widgets. If you use the straight widget, the connecting line is straight.
Horizontal	Choose a flow widget (straight, horizontal or vertical) to connect two node widgets. If you use the horizontal widget, the connecting line starts horizontally from a node and ends horizontally at another node.
Vertical	Choose a flow widget (straight, horizontal or vertical) to connect two node widgets. If you use the vertical widget, the connecting line starts vertically from a node and ends vertically at another node.
Start	This node widget indicates the start of a workflow process.
Task	This node widget indicates a task in a workflow process.
Fork	This node widget indicates that multiple tasks are simultaneously active.
Join	This node widget indicates that all the previous tasks must be complete before the next task can start, or the workflow can end. If you open a workflow configured in the Classic Workflow tool, the join widget indicates there are several parallel tasks.
End	This node widget indicates the end of a workflow process.

Workflow Properties



The property sheet resides on the right panel of Workflow Designer, and shows the properties related with the current workflow. If a widget in the workspace has focus, the property settings of the widget, if any, also display in the property sheet.

- A workflow's properties always display regardless of whether a widget in the workspace has focus. For a description of workflow properties, see [Table 72: Workflow Properties](#).
- Task properties display when a task widget in the workspace has focus. For a description of task properties see [Table 73: Task Properties](#).
- Flow properties display when a flow widget (straight, horizontal, or vertical) that starts from a task widget has focus. For a description of flow properties, see [Table 74: Flow Properties](#).

Table 72: Workflow Properties

Property	Description
Workflow Name	This read-only field displays the name of the current workflow.

Property	Description
Master Process Name	This read-only field displays the name of the master process for the current workflow.
In-process Task Activation	Select whether to allow users to activate or deactivate tasks in the workflow process for a record.
Module	Select the module that you want to assign the workflow to.
Status	Select the status of the workflow. If you choose disabled you cannot associate the workflow with record types.

Table 73: Task Properties

Property	Description
Task Name	Enter the name of the task as you want it to display to users.
Initial Status	Select the task status you want to display when the task first becomes active. When you first configure a workflow task, the drop-down list is empty. After you adds a flow widget that suspends the task, the drop-down list displays the task statuses configured for the flow widget. Here is an example of a flow widget that suspends a task: 
Department	Use the Department drop-down list to select the department that is responsible for the task.
Staff	Use the Staff button to select a staff member that belongs to the selected department and is responsible for the task.
Task Specific Info Group	Select the specific task information group you want to associate with the current task in the workflow process. You set up these groups in the Classic Workflow tool.
Duration (Days)	Enter the number of days required to complete this task after it is active.
Estimated Hours	Enter the number of estimated hours required to complete this task.
Hours Spent Required	Choose Yes if you want to require that anyone who works on the task records the number of hours spent. If you do not want to require the hours spent, choose No.
Workflow Calendar	Use the drop-down list to assign a workflow calendar to the task.
Citizen Access Displayable	If you want Citizen Access to display the task, select Yes; otherwise, select No.
Skip Tasks	If you click the field entry area, a “Skip Other Tasks” window pops up. You can select the tasks that users can skip when they complete the current task.  Note: You cannot configure a task as the skipped task in multiple tasks. If you configure Task A as the skipped task in task B, and then you open the “Skip Other Tasks” window for task C, the “Skip Other Tasks” window does not list task A as an option.
Proximity Alert	If you click the field entry area, a “Proximity Alerts” window pops up. You can select the GIS proximity alerts to apply during the execution of the task.
Sub Process	Select an existing sub process that you want to add to the current task. You can also click the icon next to the field to create a new sub process in the current task.
Sub Process Completion Required	If you want the sub process in the current task to complete before moving to the next task, select Yes; otherwise, select No.

Table 74: Flow Properties

Property	Description
Task Status	This field displays the status that a task must reach before the activation of its next task. If there are multiple statuses, a task only need to reach one of the statuses before the activation of its next task.
Application Status	Enter a status in this field. If the task that the flow widget starts from reaches the Task Status , the Application Status you enter in this field displays as the Application Status.
Parent Status	This field works with the flow widget that starts from a sub process task. Enter a status in this field. If the sub process task reaches the Task Status , the parent task that contain the sub process changes to the status in this field.
Time Tracker Clock Action	Select the time tracker clock action that triggers when the task reaches the selected status. The time tracker clock controls how the Time Tracker records In Possession time for workflow tasks and for applications.
Citizen Access Displayable	If you want Citizen Access to display the task, select Yes; otherwise, select No.
Email Settings	This field displays the number of notifications to send when the task reaches the selected status. “0-notification” means there is no notification, “1-notification” means Civic Platform sends one notification, and so forth. If you click the field entry area, an “Email Settings” window pops up. You can create, edit or remove the notifications.

Working with the Classic Workflow Tool

This section provides instructions for using the Classic Workflow tool. However, because most functions in the Classic Workflow tool are available in Workflow Designer, best practice dictates the use of Workflow Designer instead of the Classic Workflow tool in most cases. See [Deciding Which Tool to Use](#) for more information.

With the Classic Workflow tool, we highly recommend that you draw a diagram on paper first, and then use the diagram as a guide when creating your workflow. With Workflow Designer you can create the diagram directly in the workspace.

Topics

- [Understanding Workflow Tasks](#)
- [Managing Workflow Processes](#)
- [Managing Workflow Hierarchy](#)

Understanding Workflow Tasks

You can set up several different types of tasks in each workflow process:

Parallel. A parallel task is any task in a group of tasks that share the same parallel indicator. You can set up parallel tasks to activate independently of one another, depending on their task numbers. Workflow participants must complete all parallel tasks in a single workflow process before the process can move forward. You can override this constraint with a combination of skip activators and indicators.

Branch. A branch in a workflow process lets users jump to any future task in the workflow process, possibly bypassing tasks in the process. You can set up a branch by using the next number of the task that you want to jump from.

Loop. A loop in a workflow process lets users return and repeat any task that they have already completed. You can set up a branch by using the next number of the task that you want to return from and the a number of the task that you want to return to.

Two 15-digit numbers drive any workflow process that you set up: a phase number and a next number.

Topics

- [Understanding Phase Numbers](#)
- [Understanding Next Numbers](#)

Understanding Phase Numbers

A workflow process phase number is a series of five 3-digit numbers that identify the unique position of this task in the workflow process and its relationship with other tasks. Depending on how you set up this number, you can determine when a user activates and when it is skipped throughout the workflow process.

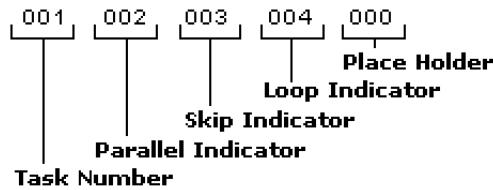


Figure 23: Example Phase Number

Table 75: Phase Number Elements

Task Number	Enter a unique 3-digit number that identifies this task and its order in the workflow process.
Parallel Indicator	If you want to activate this task simultaneously with other tasks, enter the 3-digit number that matches the 3-digit number in this position for each parallel task. Enter "000" if this task is not a parallel task.
Skip Indicator	If you want to skip this task at some point during the workflow process, enter a 3-digit indicator that matches the 3-digit activator of the task that initiates this skip. Enter "000" if you never want to skip this task.
Loop Indicator	If you need to repeat this task after a user has completed it, enter a 3-digit indicator that matches the 3-digit activator of the task that initiates this loop. Enter "000" if you never want to repeat this task.
Place Holder	This component is currently acting as a placeholder. You can enter any 3-digit number, or simply enter "000"

Understanding Next Numbers

A workflow process next number in is a series of five 3-digit numbers that identify the next task, or tasks, in the workflow process. Depending on how you set up this number, you can set up the workflow to activate the next task in the workflow process, jump to a future task, or to return to a completed task after a user completes this task. You can also set up the workflow to skip another task when a user completes this task.

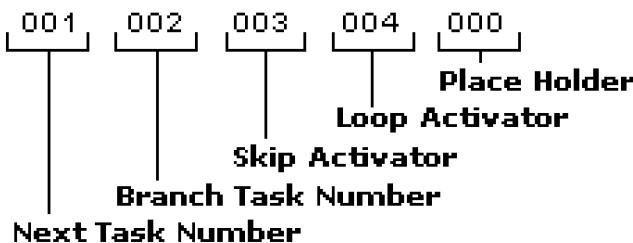


Figure 24: Example Next Number

Table 76: Next Number Elements

Next Task Number	Enter the unique 3-digit number that identifies the next task in the workflow process. Enter “000” if this task is the final task in the workflow.
Branch Task Number	If you want to jump to a future task without completing other tasks, enter the unique 3-digit number that identifies the future task in the workflow process. Enter “000” if you do not want to jump to a future task.
Skip Activator	If you want to skip a task after this task is complete, enter the 3-digit activator that matches the 3-digit indicator of the task that you want to skip. Enter “000” if you do not want to skip any tasks.
Loop Activator	If you need to repeat a task after this task is complete, enter the 3-digit activator that matches the 3-digit indicator of the task that you want to repeat.
Place Holder	Enter “000” if you do not want to repeat any task. This component is currently acting as a placeholder. You can enter any 3-digit number, or simply enter “000”.

Managing Workflow Processes

Topics

- [Adding a Workflow Process](#)
- [Editing a Workflow Process](#)
- [Viewing Process Status](#)
- [Viewing Process Status](#)

Adding a Workflow Process

Each workflow process is a series of tasks that a workflow participant must complete before issuing a certain type of permit or license. When you first implement Civic Platform, you must implement several workflow processes. As necessary, you can set up additional workflow processes at any time. You can also add or delete tasks from a process at any time.

In addition, you can put tasks into specific groups so they have the same task-specific information in a summary that a user can view.

To add a workflow process

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
 2. Choose Workflow > Process.
- Civic Platform displays the Workflow Process—Edit window.

3. Click **Add**.
 4. Enter the new process name in the Process field.
 5. Click **Submit**.
- Civic Platform supplies the default workflow process.
6. Update the fields for each task in the workflow process. For a description of fields, see [Table 77: Workflow Process Fields](#).

**Note:**

Click the yellow light bulb that appears to the left of the task if you want to use the Task Flow Assistant to help you set up phase and next numbers.

7. Click **Update**.

Table 77: Workflow Process Fields

Phase #	Enter the 15-digit number that identifies the position of this task in the workflow process and its relationship to other tasks. For more information about each component of a Phase number, see Understanding Phase Numbers .
Next #	Enter the 15-digit number that identifies one or more tasks in the workflow process that you want to activate after this task is complete. For more information about each component of a Next number, see Understanding Next Numbers .
Task Name	Enter the name of the task as you want it to display to users. This field accommodates up to 100 characters.
Initial Status	Select the task status you want to display when the task first becomes active. When you first set up a workflow process, this list is empty. After you set up the initial process, you must set up each task status. You can then return to the workflow process and choose an initial status.
Duration	Enter the number of days required to complete this task after it is active.
Estimated Hours	Enter the number of estimated hours required to complete this task.
Citizen Access Displayable	If you want Citizen Access to display the task, select Yes; otherwise, select No.
Workflow Calendar	Use the drop-down list to assign a workflow calendar to the task.
Department	Use the Department button to search for the department that is responsible for the task.
Staff	<p> Note:</p> <p>To search for a specific staff member, complete only the Staff field explained below. Civic Platform automatically populates the Department field with the corresponding department.</p> <p>Use the Staff button to search for a department and a staff member that is responsible for the task.</p> <p>If you enter a value in this field, Civic Platform carries this task assignment over to all new applications that follow this workflow.</p> <p>After creating a new application, authorized users have the option to change this assignment.</p>
Task-Specific Info Group	Select the specific task information group you want to associate with each task in the workflow process. Your agency sets up these groups, which allow you to associate similar tasks in the same group.

Hours Spent Required	Choose Yes if you want to require that anyone who works on the task records the number of hours spent. If you do not want to require the hours spent, choose No.
----------------------	--

Editing a Workflow Process

After you add a workflow process to Civic Platform, you might need to edit workflow task details. For example, you might need to change the order of the tasks, or change the person who is responsible for a task. You can change the details about any task as well as add or delete tasks.

Any changes that you make to a workflow process do not affect existing applications associated with the process.

To edit a workflow process

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Workflow > Process.
Civic Platform displays the Workflow Process—Edit window.
3. Enter the name of the workflow process that you want to find in the Process field.
4. Click **Submit**.
Civic Platform displays the Workflow Process browse page.
5. Click the red dot that appears next to the process you want under the Edit column.
6. To edit a task in the process:
 - a. update the fields for the task in the workflow process.



Note:

Click the yellow light bulb that appears to the left of the task if you want to use the Task Flow Assistant to help you set up phase and next numbers.

For a description of the fields, see [Table 77: Workflow Process Fields](#).

- b. Click **Update**.
7. To add a new task to the process:
 - a. Click **Add**.
Civic Platform displays the Add Task page.
 - b. Enter the name of the task in the Task Name field.
 - c. Click **Submit**.
 - d. Civic Platform displays the new task at the top of the workflow process.
 - e. Complete the fields for each new task.



Click the yellow light bulb that appears to the left of the task if you want to use the Task Flow Assistant to help you set up phase and next numbers.

For a description of fields, see [Table 77: Workflow Process Fields](#).

- f. Click **Update**.

**Note:**

When deleting a task, make sure you delete any references to that task you included in the phase number or next number of another task.

8. To remove a task from the process:

- a. Click **Delete** to the right of the task that you want.
- b. Click **OK**.

Viewing a Process Diagram

Viewing a workflow process lets you see a visual representation of the process. Civic Platform outlines the structure of the workflow process for you with a flowchart. Seeing a picture of a process gives you a better understanding of how each task relates to other tasks. Viewing the process can also help you to catch any errors in your setup. Refer to the example of a process diagram in [Figure 25: Example Workflow Process Diagram](#).

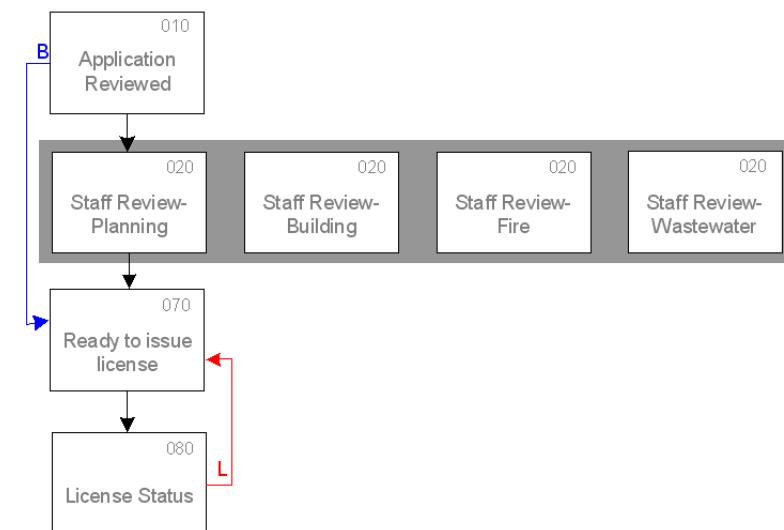


Figure 25: Example Workflow Process Diagram

Consecutive tasks appear one after the other. Parallel tasks appear on the same row and they share the same parallel indicator. Blue arrows indicate branches in the process. Red arrows indicate loops.

To view a process diagram

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Workflow > Process.
- Civic Platform displays the Workflow Process—Edit window.
3. Search for the workflow process you want to work with.
4. Do one of the following:
 - Click the red dot that appears to the right of the process name under the View column.
 - Click the red dot that appears in the **Edit** column next to the process that you want to view; then click the **Diagram View** link that appears over the task details.
5. To maximize the view of the process, click **Maximize**. To restore the size of the window, click **Restore**.

6. When you finish viewing the process, click Cancel or close the view window.

Viewing Process Status

You can view the status of every task in a workflow process. The Process Statuses view, lets you see the relationship between tasks and task statuses, and link to the Task Statuses—Edit window.

To view a workflow process

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Workflow > Process.
Civic Platform displays the Workflow Process—Edit window.
3. Search for the workflow process or task you want to work with.
Civic Platform displays the Workflow Process—Edit window or the Task Status—Edit window.
4. Click the Process Status View link that appears near the top of the window.
5. Click the plus sign that appears to the left of any task to view the statuses defined for that task.
6. Click the link to any task status to edit the status details.

Managing Workflow Hierarchy

A workflow hierarchy is an ordered collection of processes and sub processes. You can use a workflow hierarchy to manage sophisticated workflows at your agency. In addition to tasks and sub tasks, you can combine processes and establish sub processes.

Editing a workflow hierarchy involves adding and removing sub processes. A sub process is similar to a sub task that lets you break down a workflow task into smaller tasks. Sub processes let you break down a workflow hierarchy into smaller processes. For instructions on editing the tasks in the main process or in a sub process, see [Managing Workflow Processes](#).

Topics

- [Establishing a Workflow Hierarchy](#)
- [Adding a Workflow Sub Process to a Workflow Hierarchy](#)
- [Removing a Sub Process from a Workflow Hierarchy](#)

Establishing a Workflow Hierarchy

Establishing a workflow hierarchy involves creating several workflow processes and then combining them in a hierarchical organization. The benefit of establishing a workflow hierarchy is that you can create a validated set of sub tasks that users must accomplish in a certain order.

When you establish your workflow hierarchy keep in mind that you can add only one sub process to each task. For information about adding a sub process to the hierarchy, see [Adding a Workflow Sub Process to a Workflow Hierarchy](#).

To establish a workflow hierarchy

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Workflow > Workflow.
Civic Platform displays the Workflow—Search page.

Workflow - Search

Use this form to add or search Workflow.

Workflow:
 All Enable Disable

Submit
or
Add
New Workflow

3. Click Add.

Civic Platform displays the New Workflow window.

New Workflow

Workflow * :

Master Process * :

Inprocess Task Activation: Enabled Disabled

Submit **Cancel**

4. Complete these fields:

Workflow Enter the name of the workflow hierarchy that you want to create.

Master Process Select the name of the master workflow process to which the sub process belongs.

Inprocess Task Activation Select whether you want to allow in-process task activation for the workflow hierarchy.

5. Click Submit.

Civic Platform displays the Workflow—Edit window

Workflow - Edit

Workflow * : BLDG_ADDRESS
Master Process * : BLDG_ADDRESS
Module: All Modules

Inprocess Task Activation: Enabled Disabled
Status: Enabled Disabled

Workflow	Subflow Completion Required
 BLDG_ADDRESS <ul style="list-style-type: none"> • Application Submittal • Initial Review • Public Safety Review • Notification 	

Add Sub Process **Save** **Search** **Cancel**

- A Current mode of this workflow hierarchy
- B The master process folder that contains workflow tasks
- C Blue dot, which indicates a task without a sub process
- D Hierarchy command options

Adding a Workflow Sub Process to a Workflow Hierarchy

In a Civic Platform workflow, a sub process is a workflow process that you have already defined and which you want to add to a task within another process.

Because you are associating an actual workflow process to a task in another workflow process, known as the master process, you can enforce the tasks that make up the sub process. In other words, you can determine which tasks a user must complete when, and you can require that the user complete them

before moving on to other tasks. You can also attach documents, checklists, and comments to these tasks, just as for a master workflow process.

To add a sub process to a workflow hierarchy

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Workflow > Workflow.
3. Search for the workflow hierarchy you want.
4. Click a task within the master process folder.

Civic Platform displays the selected task in red.

Workflow - Edit

Workflow:** BUILDING WORKFLOW
Master Process:** BLDG-STAN
Status: Enabled Disabled

Workflow	Subflow Completion Required
BLDG-STAN	
• Application Acceptance	
• Application Approval	
• Engineering Review	
• Overall Plan Check	
• Permit Issuance	
• Inspection	
• Final Inspections	
• Closed	

Add Sub Process **Save** **Search** **Cancel**

5. Click Add Sub Process.

Civic Platform displays the search window for a workflow process.

Use this form to add or search Workflow Process.

Workflow Process:**

Submit **Cancel**

6. Enter the name of the sub process that you want to add to the master flow. If you do not know the complete name of the process, you can enter the first few characters of the name, or click **Submit** to see a list of all defined processes.

7. Click **Submit**.

Civic Platform displays your search results.

Use this form to select a sub process.

Process

Process	Select
DESIGN REVIEW	Select
DESIGN REVIEW PROCESS	Select

Search **Cancel**

8. Click **Select** to the right of the process that you want to add to your workflow hierarchy.

Civic Platform adds the sub process to the selected task in the master process folder.



A The plus or minus symbol indicates a task with a sub process

- B The sub process folder with tasks within it
 C The sub process completion requirement option
9. If you want to require that users complete the new sub process as part of the master process, select Yes; otherwise, select No.

10. Click Save.

Removing a Sub Process from a Workflow Hierarchy

To remove a sub process from a main process does not delete the process from your system, but does delete it from the master process.

To remove a sub process from a workflow hierarchy

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Workflow > Workflow.
3. Search for the workflow hierarchy you want.
4. Click a task within the master process folder.

Civic Platform displays the selected task in red.



The screenshot shows the 'Workflow - Edit' interface. At the top, it displays 'Workflow*: BUILDING WORKFLOW' and 'Master Process*: BLDG-STAN'. Below this, the 'Status' is set to 'Enabled'. The main area is titled 'Workflow' and shows a tree structure. A red arrow labeled 'A' points to a sub-process folder named 'Engineering Review' which contains several tasks: Application Acceptance, Application Approval, Overall Plan Check, Permit Issuance, Inspection, Fire Inspections, and Closed. At the bottom of the screen, there is a row of buttons: 'Add Sub Process', 'Remove Sub Process', 'Save', 'Search', and 'Cancel'. A red arrow labeled 'B' points to the 'Remove Sub Process' button.

- A Selected task
 B Civic Platform enables the Remove Sub Process button only when you select a task with a sub process.
5. Click Remove Sub Process.
6. Click OK.

Creating Task Statuses

This section describes the process of creating statuses that users can apply to any task in a workflow process, from the task properties panel. Task statuses tell Civic Platform whether reaching the status drives the workflow forward or backward, or keeps it the same. Based on the task status, users can choose to activate the next task, loop back to a completed task, or branch forward to a future task. Users also have the option to leave the current task active, by setting its status to "No Change." All other options force the active task to become inactive to activate another task in the workflow process.

Topics

- [Configuring Agency-defined Fields for Workflows](#)
- [Tracking In-possession Time for a Record](#)
- [Configuring Automatic Email Messages](#)
- [Managing Automatically Printed Reports](#)

To create a workflow task status

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Workflow > Task Status.
3. Click **Add**.
4. Complete the necessary fields as described in [Table 78: Workflow Task Status Fields](#).
5. Click **Save**.

Table 78: Workflow Task Status Fields

Process Code	Select an existing workflow process. Civic Platform refreshes the window after you choose a process code to display the corresponding task descriptions for the process that you choose.
Task Status Code	Enter a unique code or an abbreviation for the task status.
Task Description	Select the task to which you want to add the status. This field accommodates up to 100 characters.
Status Description	Enter a brief description that helps you identify the task status as you want it to display to users.
Resulting Action	Select one of these options to determine the action when the task attains this status: No ChangeChoose Next TaskChoose Branch TaskChoose Loop Task
Record Date	Enter the date Civic Platform last updated the task status record that you want to find.
Recorder ID	Enter the user ID of the person responsible for last updating the task status record.
Application Status	Enter the value to update the application to. When Civic Platform updates the task to the task status you are defining, it then updates the application to the status you indicate in this field. If you leave this field blank, no update to the application status occurs.
Parent Status	Enter the status of the parent task.

Citizen Access Displayable	If you want Citizen Access to display this task status, select Yes; otherwise, select No. Note: The Citizen Access Displayable setting is on the task and task status. Only when you set the ACA Displayable field to "Yes" on both the task and task status, are you able to display the task status Citizen Access. For more information about task setting, see Table 77: Workflow Process Fields .
Status	If you want to let users start choosing this status for workflow tasks, select Enable; otherwise, select Disable.

Configuring Agency-defined Fields for Workflows

Task-specific information (TSI) are the agency-defined fields that are unique to workflow tasks. Users complete these custom TSI fields when they update a workflow task.

Civic Platform workflows leverage TSI using the following organizational hierarchy:

- Workflow tasks leverage TSI from TSI groups
- TSI groups contain one or more TSI subgroups
- TSI subgroups contain one or more TSI fields

Topics

- [Creating a Task-Specific Information Group](#)
- [Editing a Task-Specific Information Group](#)
- [Adding a Field to a Task-Specific Information Group](#)
- [Editing a Field in a Task-Specific Information Group](#)
- [Deleting a Field from a Task-Specific Information Group](#)
- [Setting up Drop-down List Field Values](#)
- [Applying Shared Drop-down Lists](#)

Creating a Task-Specific Information Group

When you create a new Task-Specific Information group, you specify the group code and its name, as well as the first field that you want to include in the group. You can set up other information about the field, including the field type and a default value. You can set up additional fields, change the order of fields in the group, and change any values when you edit the task-specific group.

When you create a Task-Specific Information Group, you must also specify the category that the group belongs to. You can set up the first field so that it is searchable or required. You can also specify a default value and a fee indicator.

For example, you can require data entry in the field, but only after the user is ready to move to the next task. You can then set the Required Flag to No, the No Change to No, the Next Task to Yes, the Branch to Yes, and the Loop to Yes. When a daily user enters a status that moves an item to the next task, Civic Platform requires the user enter the Task-Specific Information before moving to the next task.

To add a task-specific information group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Workflow > Task-Specific Info.

Civic Platform displays the Task-Specific Information—Search page.

3. Click Add.

Civic Platform displays the Task-Specific Info Group—Add window.

Task Specific Info Group - Add

Task Spec Info Group Code * :

Task Spec Info Subgroup * :

Group Display Order:

1st Field Label * :

Field Type * : Text

Display Order * :

Default Value:

Unit: or New Unit:

Fee Indicator:

Required Flag: Yes No

Supervisor Edit Only: Yes No

Searchable Flag: Yes No

Max Len:

Display Len: Page Number

Required with Task Statuses No Change: Yes No

Required with Task Statuses Next Task: Yes No

Required with Task Statuses Branch: Yes No

Required with Task Statuses Loop: Yes No

ACA Displayable: Yes No

Justification:

Status: Enable Disable

4. Update the fields that display. For a description of the fields, see [Table 79: Task-Specific Information Group Fields](#).

5. Click Submit.

Table 79: Task-Specific Information Group Fields

Task-Spec Info Group Code	Enter a unique code to identify the category that the Application Specific Information group belongs to.
Task-Spec Info Group Name	Enter a name to identify the Specific Information group. There can be many groups in one category. This name only applies when there is more than one group in a category.
Group Display Order	Enter a number to determine the position of this information group on the Application Specific Information page in Daily Activities. For example, if you want this information group to appear second, enter 2.
1st Field Label	Enter the label for the first field you want to add to your Application Specific Information group. For example, if you want to prompt users to specify a date, enter "Date."
Citizen Access Displayable	If you want Citizen Access to display this information, choose Yes; otherwise, choose No.
Citizen Access Searchable	If you want users to be able to search for task-specific information, select Yes; otherwise, select No.
Display Len	Specify the maximum number of characters that Civic Platform displays.

Display Order	Enter a number to determine the position of the first field in your Application Specific Information group. For example, if you want the field to display before any other fields, enter 1.
Default Value	If you want to provide a default value for the first field in your Application Specific Information group, enter it here. If you are setting up a drop-down list, you can add values to the drop-down list so that a user has multiple values to choose from. For instructions, see Setting up Drop-down List Field Values .
Fee Indicator	If you want to use the first field value in a fee calculation, enter the unique 5-digit indicator, that you use to identify this application specific variable in the fee formula. You must use a value between 10100 and 10599 and use the format: \$fixxxxx\$For example, enter \$fi10101\$
Field Type	Choose the type of the first field in your Application Specific Information group. You can choose from Text, Date, Y/N, Number, Drop-down List, Text Area, Money, Time, and Check box field types. For more information on field types, see Adding a Field to a Task-Specific Information Group .
Justification	If you want the field label to be right or left aligned, select the drop-down list to select either Right Align or Left Align. Justification is useful when you are using a language other than English that requires justification.
Max Len	Specify the maximum number of characters that the field accepts.
Required Flag	If you want to require the Task-Specific Information on all status actions including a No Change, Next Task, Loop, and Branch, select Yes; if you want to make the Task-Specific Information collection optional, select No.
Required with Task Statuses Branch	If you set the Required Flag to No, but you want to make Task-Specific Information required when a user selects a status that leads to a task branch, select Yes; otherwise, select No.
Required with Task Statuses Loop	If set the Required Flag to No, but you want to make Task-Specific Information required when a user selects a status that leads to a task loop, select Yes; otherwise, select No.
Required with Task Statuses Next Task	If you set the Required Flag to No, but you want to make the Task-Specific Information required when a user selects a status that leads to the next task, select Yes; otherwise, select No.
Required with Task Statuses No Change	If you set the Required Flag to No, but you want to require Task-Specific Information when there is no change to the task status, select Yes; otherwise, select No.
Supervisor Edit Only	If you want only a supervisor to be able to edit the group options, select Yes; otherwise select No.
Searchable Flag	If you want to let users search for applications based on this field, click Yes; otherwise, click No.
Status	If you want to let users see this field in Civic Platform, select Enabled; otherwise, select Disabled.
Unit	If you want to attach a unit such as square feet, dollars, or miles to the first field value, enter it here. You can choose from standard choices, or enter a new unit.

Editing a Task-Specific Information Group

After you create a Task-Specific Information group, you might need to change it. You can update any fields that belong to the group by changing the field type or any other features about the field, including the display order. You cannot change the field label, but you can add new fields to the group, and delete fields that you no longer use.

To edit a task-specific information group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose Workflow > Task-Specific Info.

Civic Platform displays the Task-Specific Information page.

3. Complete these fields to search for the group that you want to edit:

Task-Specific Info Group Code Enter the group code associated with the Application Specific Information group you want to search for.

Task-Specific Info Group Name Enter the name of the group you want to search for. There can be many groups in one category. This name only applies when there is more than one group in a category.

4. Click **Submit**.

To see a list of all groups, click **Submit** without entering details about an individual group.

5. In the list of groups, click the red dot that appears next to the group that you want to edit.

6. Update the fields that display. For a description of the fields, see [Table 79: Task-Specific Information Group Fields](#).

7. Click **Update**.

Adding a Field to a Task-Specific Information Group

You can add any number of fields to a Task-Specific Information group. You can choose from any of the eight basic types of agency-defined fields:

- Number Field. Lets users enter only numeric characters in a number field. Number fields display the word number to the right of the field.
- Text Field. Lets users enter only text characters in a text field. Text fields display the word text to the right of the field.
- Text Area. Lets users enter multiple lines of text, such as a three line address.
- Date Button. Lets users search for a date rather than entering a date manually.
- Yes/No Radio Buttons. Lets users select one value by selecting Yes or No.
- Drop-down List. Lets users choose a value from a list of predefined values determined by your agency.
- Time. Lets users enter a time value.
- Money. Lets users enter a dollar amount.
- **Check box**. Lets users select a check box to select the option.

To add a field to a task-specific information group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose Workflow > Task-Specific Info.

3. Complete these fields to search for the group that you want:

Task-Specific Info Group Code Enter the unique code that identifies the category to which the Application Specific Information group belongs.

Task-Specific Info Group Enter the name of the group for which you want to search.
Name

4. Click Submit.

To see a list of all groups, click **Submit** without entering details about an individual group
Civic Platform displays the Task-Specific Info—Browse page.

5. Click the red dot that appears next to the group to which you want to add a field.

Civic Platform displays the Task-Specific Information page.

6. Click Add.

7. Complete the fields that display. For a description of the fields, see [Table 79: Task-Specific Information Group Fields](#).

8. Click Submit.

Editing a Field in a Task-Specific Information Group

After you create a Task-Specific Information group, you might need to change it. You can add or delete fields; change the field type, display order, and the default value. You cannot however change the group code, group name, or the field labels when you edit the group.

To edit a task-specific information group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose Workflow > Task-Specific Info.

3. Complete these fields to search for the group that you want to edit:

Task-Specific Info Group Enter the unique code that identifies the category to which the Application Specific Code Information group belongs.

Task-Specific Info Group Enter the name of the group for which you want to search.
Name

4. Click Submit.

To see a list of all groups, click **Submit** without entering details about an individual group.
Civic Platform displays the Task-Specific Info—Browse window.

5. Click the red dot that appears next to the group that you want.

6. Complete the fields that display. For a description of the fields, see [Table 79: Task-Specific Information Group Fields](#).

7. Click Update.

Deleting a Field from a Task-Specific Information Group

If you no longer need a field in your Task-Specific Information group, or if you want to change the field label, you can delete the field.

To delete a field from a task-specific information group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose Workflow > Task-Specific Info.

3. Complete these fields to search for the group that you want.

Task-Specific Info Group Enter the unique code that identifies the category to which the Application Specific Code Information group belongs.

Task-Specific Info Group Enter the name of the group for which you want to search.
Name

To see a list of all groups, Click **Submit** without entering details about an individual group.

4. Click **Submit**.

5. In the list of groups, click the red dot that appears next to the group from which you want to delete a field.

6. Click **Delete** next to the field that you want to delete.

7. Click **OK**.

Setting up Drop-down List Field Values

After you create a Task-Specific Information group, you can add fields to the group. If you add drop-down list fields, you must then set up the values that you want to include as options in the list. You can set up the values individually, or apply a shared drop-down list which has preconfigured values. For more information on how to apply a shared drop-down list, refer to [Applying Shared Drop-down Lists](#).

Users can choose values when completing an application. For example, if you are adding a field to enter contact information, you can provide a drop-down list of contact types. Add, modify, or delete drop-down values to create the desired list.

To set up values for a drop-down list

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose Workflow > Task-Specific Info.

3. Complete these fields to search for the group that you want.

Task-Specific Info Group Enter the unique code that identifies the category to which the Application Specific Code Information group belongs.

Task-Specific Info Group Enter the name of the group for which you want to search.
Name

To see a list of all groups, click **Submit** without entering details about an individual group.

4. Click **Submit**.

5. In the list of groups, click the red dot that appears next to the group that you want.

6. Click **Edit** next to the drop-down field that you want.

Civic Platform displays a page where you can add, edit, or delete drop-down list values.

7. Do one of the following:

- If you want to add a new value, click **Add** and enter the value in the Item Value field.
- To update an existing value, replace the value text, and then Click **Update**.
- If you want to delete a value, click **Delete**.

8. Click **Close** to return to the list of fields in your group.

Applying Shared Drop-down Lists

After you create a task-specific information group and add a drop-down field to it, you must add values to populate the drop-down list. You can set up values individually or apply a drop-down list with pre-configured values, known as a shared drop-down list. This section provides instructions on how to apply shared drop-down list values to a drop-down list.

For information on how to create a shared drop-down list, refer to the [Customizing Menus, Tabs, and Drop-down Lists](#).

To apply a shared drop-down list

1. Locate the task-specific information group to which you want to apply a shared drop-down list. For instructions, see [Editing a Task-Specific Information Group](#).
2. Click the red dot next to the subgroup that contains the field for which you want to set drop-down list values.

Civic Platform displays the Task-Specific Info page.

Required with Task Statuses																	
Field Label (Default)	Field Label	Type	Display Order	Fee Indicator	Unit	Default Value	Required	Supervisor Edit Only	Searchable	Max Len	Display Len	No Change	Next Task	Branch Loop	ACA Displayable	Justification	Status
Residential	Residential	DropdownList	1				No	No	No			No	No	No	No	No	Enabled

Buttons at the bottom: Update, Add, Cancel.

3. Click Edit next to the drop-down list you want.

Civic Platform displays the Task-Specific Info Drop-down List—Add page.

Task Specific Info DropDown List - Add

Task Spec Info Group Code: SAP_SAC
Task Spec Info Subgroup: GENERAL
Task Spec Info Field Label: Residential

Apply changes to this subgroup only:
Apply changes to all subgroups:

Use Shared Drop Down Lists:

Add Close

4. Select the **Use Shared Drop Down Lists** option.

5. Do one of the following:

- Click **Search** to return all shared drop down lists.
- Enter the first letter of the drop-down list or any other search criteria, then click **Search**.

Civic Platform returns the Shared Drop Down List-Browse page.

Shared Drop Down List - Browse

Use this form to search for a Shared Drop Down List.

Name	
Activity	<input type="button" value="Select"/>
Agriculture	<input type="button" value="Select"/>
Amber	<input type="button" value="Select"/>
Building Materials	<input type="button" value="Select"/>
Cities	<input type="button" value="Select"/>
City	<input type="button" value="Select"/>
CityCode	<input type="button" value="Select"/>
Seeds and Crops Cultivation	<input type="button" value="Select"/>
Subnature of Activity	<input type="button" value="Select"/>
county	<input type="button" value="Select"/>

< 1 2 3 4 5 6 >

Search Close

6. Click **Select** next to the drop-down list you want to apply.



Note:

You can only select one shared drop-down list.

Civic Platform returns to the Task-Specific Info Drop-Down List-Add page with the Field Values from the shared drop down list in blue underlined text.

7. Click **Update**.

Tracking In-possession Time for a Record

Topics:

- [Setting Up Time Tracking](#)
- [Recording an Estimated Task Duration](#)
- [Setting Up an Estimated Record Due Date](#)
- [Setting a Time Tracker Clock](#)

Setting Up Time Tracking

If you plan to set up time tracking for a record, make sure you configure the required security settings for the record type:

- Set the Record Access to Full “Access of application type” for the agency.
- Set FID 0245 Long Term Time Tracking to Full Access security and apply it to the agency.
- Set FID 8132 Workflow to Full Access security.

For instructions on configuring record type security, see [Adding Record Type Security](#).

To set up time tracking for a record type

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Application > Application Type**, and locate the Application Category—Edit window of the record type you want to apply time tracking.
Civic Platform Application Category—Edit window displays.
3. Specify a value that indicates the number of days, in the **Duration** field, to process and complete the application type.

Duration is the estimated Due Date for each application type. The Duration field records the time tracking expectation. If this field has no values, the elapsed time does not display within other areas of Civic Platform, such as the Workflow Task.

The estimated due date is dependent on record clock start date/time and the time tracking expectation set for the record type.

**Note:**

You can link each task status to a Time Tracker clock action. To set this up, you must apply the record type to a Workflow process. The Workflow process field is also on the Application Category page and displays in the screenshot below.

Application Category - Edit

Use this form to edit Application Category.

Enable For ACA? Enable Application Also Enable Issuance
 Enable Renewal Also Enable Issuance
 Renewal CAP Type*: AMS/AAM641/AAM641/AAM641
 Enable Fee Estimation

Group: Building
Type: Building Dept
Subtype: Residential
Category: New

Application Type Alias:
Status: Enable Disable

Tee Schedule*: BLDGRESNEW

Application Type Icon:

Enforcement Type:

Inspection Group Code: Building
Workflow*: B_RES_NEW

Application Specific Info Group Code: BRN 001
SmartChoice Group Code*: ACA DEMO FOR PARCEL
Page Flow Code For ACA: C7C2

eMail For Hearing Notification:
Expiration Code: NONE

Application Key Mask*: Building Dept-BRN Application Key Mask Definition
ID Mask: ID Mask Definition

Receipt Number Scheme: Receipt Number Definition
Document Code: STANDARD_BUILDING
Document Code For ACA:

Application Status Group Code: STANDARD_BUILDING
Default CAP Status:

Address Type Group Code:
Copy all associated APO:
Duration (Days): 8

4. Click Save.

The Application Category—Edit window stores the expected duration.

5. Set up the on-duty (start time) and off-duty (end time) using the Standard Choice LONG_TERM_TIME_TRACKING.

Use this Standard Choice to set regular working hours for a typical work day. The Time Tracker function uses this schedule when calculating In Possession time. The on-duty time sets the time work typically begins; for example, 8 am. The off-duty time defines the time work typically ends; for example, 5 pm. You must include the am and pm designations with the 12-hour clock hour in the Value Description field.

You can only define one set of working hours per agency. You can specify working hours using either 12- or 24-hour clock values. However, work hours must use the same set of clock values for the Value Descriptions.

Set up the LONG_TERM_TIME_TRACKING Standard Choice using these values, and specify the appropriate value descriptions.

Standard Choice Values	Value Description
ON_DUTY_TIME	8:00 AM
OFF_DUTY_TIME	5:30 PM

- To store the number of days that a task should typically take, Civic Platform uses this number of days (Duration) along with a workflow calendar to compute the task completion date. To configure the task status for time tracking, continue with the next set of steps, [Setting a Time Tracker Clock](#).

Recording an Estimated Task Duration

Administrators can use Civic Platform to store the number of days that a task should typically take. Civic Platform uses this number of days along with a workflow calendar to compute the task completion date. Using the workflow calendar ensures that the computed due date does not include non-working days such as weekends and holidays. Civic Platform computes the estimated due date and time of a task as the date and time a task begins added to the duration of days multiplied by 8 (the number of working hours in a day).

To record an expected task duration

- Identify the Workflow process assigned to the record type that you want to track time.
 - Access the Classic Administration page ([Accessing Classic Administration](#)).
 - Choose Workflow > Process.
 - Locate the process you want to edit or click **Add** to create a new process.
- Civic Platform displays the Workflow Process—Edit window.
- Click the Process Status View link.
 - In the Duration (Days) field, enter the number of days you estimate each task should take.

The screenshot shows the 'Workflow Process - Edit' window with the 'Process Status View' tab selected. The 'Process' is set to 'ADHCC_WORKFLOW'. The table lists three tasks:

Phase #	Next #	Task Name	Initial Status	Duration (Days)	ACA	Displayable Calendar
Department Staff (F/M/L)	01000000000000	Call	0	0	Yes	
APCD Engineering						<input type="button" value="Delete"/>
Task Specific Info Group:	01000000000000	Do Not Use This Process	0	0	Yes	<input type="button" value="Delete"/>
APCD Accounting						<input type="button" value="Delete"/>
Task Specific Info Group:	02000000000000	Meeting	0	0	Yes	<input type="button" value="Delete"/>
APCD Engineering						<input type="button" value="Delete"/>
Task Specific Info Group:						<input type="button" value="Delete"/>

At the bottom are buttons for **Update**, **Add**, and **Cancel**.

- Use the drop-down list in the **Workflow Calendar** field to choose the workflow calendar you want to associate with the task.
- Click **Update** to save the changes made to the Workflow process page.

Setting Up an Estimated Record Due Date

Civic Platform can calculate an estimated record due date based on data that you enter. Administrators can use Civic Platform to store the number of days that a record type typically takes for the approval process. When the In Possession Time Clock starts, Civic Platform calculates the estimated due date by adding the number of duration days multiplied by 8 (the number of working hours in a day) to the field, "Application Time Start Date."

To set up an estimated application due date

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Application > Application Type.
3. Locate the application type you want to edit or click **Add** to create a new record type. Civic Platform opens the Application Category-Edit window.
4. In the Duration (Days) field, enter the number of days you estimate the record should take.
5. Click **Save**.

Setting a Time Tracker Clock

You can link each task to a Time Tracker clock action. Administrators must set Time Tracker Clock Actions to control how the Time Tracker records In Possession time for workflow tasks and workflow records. The task involves searching and selecting the workflow process associated with the record type, and to then configure the task's Status for time tracking.

The Time Tracker Clock Action field provides four settings you can apply to a Task Description: No Action, Start, Stop, and Close. Civic Platform triggers the timer when the status of a workflow task changes, starts, stops, or closes the time tracking, and then calculates the total time accordingly.

For example, set the Task drop-down list to "Application Acceptance" and in the Status Description field enter "Start of Time Tracking" and set the Time Tracker Clock Action drop-down list to Start.

You can specify other task descriptions, such as "Close" and in the Status Description field enter "End of Time Tracking" and set the Time Tracker Clock Action for the last task as Stop.

To set a Time Tracker clock on a workflow task

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Workflow > Task Status.

Civic Platform displays the Task Status - Search page.

Task Status - Search

Use this form to add or search Task Status.

Process Code:	<input type="text"/>
Task Status Code:	<input type="text"/>
Status Description:	<input type="text"/>
Task Description:	<input type="text"/>
Resulting Action:	<input checked="" type="radio"/> All <input type="radio"/> No Change <input type="radio"/> Go To Next Task <input type="radio"/> Go To Branch Task <input type="radio"/> Go To Loop Task
Record Date:	<input type="text"/> <input type="button" value="Date"/>
Recorder ID:	<input type="text"/>
ACA Displayable:	<input checked="" type="radio"/> All <input type="radio"/> Yes <input type="radio"/> No
Status:	<input checked="" type="radio"/> All <input type="radio"/> Enable <input type="radio"/> Disable
<input type="button" value="Submit"/> or <input type="button" value="Add"/> <input type="button" value="New Task Status"/>	

3. Enter the Task Status Code or the Process Code, using either the full name or a few initial characters of the name.

This step requires knowing either the Task Status Code or the Process Code. This Process Code is the code, or abbreviation, of the workflow process to which the task status belongs.

4. Click **Submit**.

5. Do one of the following:

- Locate the Task Description for which you want to set up the time tracking clock, and then click the red dot next to the Process Code.
 - Click **Add** to add a new Task Status and Task Description to the Task Status.
- 6.** Set the **Time Tracker Clock Action** so that, when the task attains this status, one of the options listed below happens:
- | | |
|-----------|--|
| No Action | If a task updates to a status that has the Time Tracker Clock set to "No Action" then there is no effect on the Time Tracker clock. |
| Start | If a task updates to a status that has the Time Tracker Clock set to "Start" then Civic Platform starts the time tracker clock for that current task, by using the current date and time as the start time. This clock time contributes to In Possession time. |
| Stop | If a task updates to a status that has the Time Tracker Clock set to "Stop" then Civic Platform halts the time tracker clock for that task. Stop does not reset the clock. |
| Close | If a task updates to a status that has the Time Tracker Clock set to "Close" then Civic Platform closes the Time Track Clock record. |

- 7.** Click **Save**.

Configuring Automatic Email Messages

Topics

- [Adding an Email Message](#)
- [Searching for an Email Message](#)
- [Editing an Email Message](#)
- [Establishing Email Settings](#)
- [Specifying Email Settings in an EMSE Script](#)

Adding an Email Message

In addition to establishing the email setting, you must compose the email message Civic Platform sends based on the email setting. Civic Platform sends the message to a specified recipient when a workflow task reaches a certain status, which you specify in the email setting.

To add an email message

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Workflow > Email Message.
3. Click **Add**.
4. Complete the necessary fields as described in [Table 80: Email Message Fields](#).
5. Click **Save**.



Note:

As an alternative, you can create a new email message by copying an existing one.

Table 80: Email Message Fields

Contents Code	Enter a unique code, or an abbreviation, to identify the content of the email message.
Message Type	Enter a unique name for the email message. The email setting references this name, which determines when to send the message as well as the recipient.
Message Subject	Enter the text that you want to appear in the subject line of the email.
Message Content	Enter the full text message that you want to send to a recipient using email. You can enter a message up to 2000 characters long.
Status	Select the current mode of the email message. You can enable the message at this time, or disable it and enable it later.

Searching for an Email Message

To edit an email message, you must first search for the message on your system. You can search for an email message based on the contents code or the message name—both of which are unique identifiers for a certain email message.



Note:

To see a list of all messages, click **Submit** without entering details about an individual message.

To search for an email message

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Workflow > Email Message.
3. Complete the necessary fields as described in [Table 80: Email Message Fields](#).
4. Click **Submit**.
Civic Platform displays the Email Message browse page.
5. Click the red dot that appears to the left of the email message that you want.

Editing an Email Message

After you compose an email message, you might need to edit the message content. In addition to editing the content, you can change the message name, subject, and status.

To edit an email message

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Workflow > Email Message.
3. Search for the email message you want. For instructions, see [Searching for an Email Message](#).
4. Click the red dot that appears in the Edit column next to the message that you want.
5. Complete the necessary fields as described in [Table 80: Email Message Fields](#).
6. Click **Save**.

Establishing Email Settings

The email setting for each workflow process determines which email message you want to send when Civic Platform updates the workflow process. For example, after a building review is complete, you can notify the building supervisor.



Note:

Although you can set up multiple email messages for the same task status, Civic Platform only sends one email message to a single recipient for each status update. Civic Platform recommends that you set up only one recipient, one email address, and one message for each task status.

When you first add an email setting, you can specify the combination of a workflow process, task, and status that generates an email message. You can also choose which email message you want to send when this combination occurs. You can determine the recipient of the email message later when you edit the email setting.

To specify email settings for a workflow task

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Workflow > Email Setting.
3. Search for the workflow process with the task to which you want to add an email setting.
4. Click **Add**.
Civic Platform displays the Email Setting Add page.
5. Complete the necessary fields as described in [Table 81: Email Settings Fields](#).
6. Click **Submit**.

Table 81: Email Settings Fields

Task	Choose the workflow task. Civic Platform refreshes the window after you choose a task to display the corresponding statuses for the task that you choose.
Notify Contact Relationship Type	Choose the type of contact you are notifying from the drop-down list.
Notify Applicant?	If you want to notify the applicant, select the tasks for which you want to send notifications.
Notify Next Recipient?	If you want to notify someone other than the applicant, choose this option and enter the next two fields with information about this recipient.
Recipient First/Middle/Last	Enter the name of the recipient.
Email	Enter the email address of the recipient.
Status	Choose the status that you want.
Message Type	Choose the email message that you want to send.

Specifying Email Settings in an EMSE Script

You might have created EMSE scripts to update a workflow process. If you want to send an email message after a workflow task update by EMSE, you must call the following method in the EMSE script:

Accela

```
Automation.workflow.sendEmailForWorkflowTaskUpdated(Task, emailFrom, emailTo, emailCC)
```

The method sets the email addresses from which and to which Civic Platform sends the notification. For other email notification parameters such as Message Type, Civic Platform reads from the email setting for the workflow process in Classic Administration. See [Table 80: Email Message Fields](#).

Managing Automatically Printed Reports

Topics

- [Defining Automatically Printed Reports](#)
- [Associating a Report with a Workflow Task Status](#)

Defining Automatically Printed Reports

You can define the reports that automatically print with workflow task updates. You enter the report configuration. If you need an example of the report configuration, you can see a template of that displays how to configure your report.

To define automatically printed reports

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Report Management > Auto Report.

Civic Platform displays the Define Oracle and ARW Report page.

Define Oracle and ARW Report

Use this form to Define Oracle and ARW Report

Report Type:	Oracle	Template
Report:	<pre><?xml version="1.0" encoding="ISO-8859-1" ?> <oracle-reports> <report> <function>Report 6000</function> <title>Test Title</title> <fid>0192</fid> <report-action>Rpt6000</report-action> </report> <report> <function>Report 00007</function> <title>Building Permit</title> <fid>6000</fid> <report-action>Rpt6000</report-action> </report> <report> <function>Report 6001</function></pre>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

3. Select either Oracle or Accela Report Writer from the **Report Type** drop-down list.
4. If you want to create your report using the report template, click the **Template** link and Civic Platform displays the template.
5. Configure your report in the **Report** field.
Please note that each report type within your agency must be unique.
6. When you finish configuring the report, click **Save**.
Civic Platform saves your report.

Associating a Report with a Workflow Task Status

You can create a report that automatically prints when the user changes a workflow task. After you create and define the report, you can manage the report associations with workflow tasks.

To associate a report to a workflow status, you must add a workflow report setting. This setting identifies which report to run when a user changes a workflow task.

To add a workflow report setting

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose Workflow > Report Setting.

Civic Platform displays the Report Setting Search page.

Report Setting - Search

Use this form to search Report Setting .

Process:

Submit

3. If you know the name of the workflow process you want to add a report setting to, enter the name of the process. If you do not know, you can leave the field blank.

4. Click **Submit**.

Civic Platform displays the Report Setting Browse page.

Report Setting - Browse

Select a process below to edit its Report Settings.

(Click the ● below to select.)

Process

- ADHOC_TASKS
- ADM_ITPROJ
- AMYTEST
- BLDG_ADDRESS
- BLDG_CF
- BLDG_CF_FR
- BLDG_COMMERCIAL
- BLDG_COMMERCIAL_FORMAL_REVIEW
- BLDG_COMMERCIAL_TRIAGE
- BLDG_COM_PLANS
- BLDG_COM_PLANS_REV
- BLDG_DEMO
- BLDG_DEMO_FR
- BLDG_FIRE
- BLDG_FIRE_REVIEW
- BLDG_FIRE_TRIAGE
- BLDG_FPP_AR
- BLDG_MINOR
- BLDG_MINOR_0110

◀ Pages: 1 2 3 4 5 6 7 ▶

Search

5. Click the red dot by the process to which you want to add a report setting.

Civic Platform displays the Report Setting page.

Report Setting

Use this form to set up Report Setting

Process: BLDG_ADDRESS

No Report Settings have been created for this process.

Add

6. Click **Add**.

Civic Platform displays the Report Setting Add page.

Report Setting - Add

Process: BLDG_ADDRESS

Task:	Application Submittal
Status:	Not Ready
Report Type:	Oracle Report
Report:	Building Permit

Submit **Cancel**

7. Update the fields as defined in [Table 82: Workflow Report Setting Fields](#).

8. Click **Submit**.

Civic Platform adds your workflow report setting to the Report Setting page.

Table 82: Workflow Report Setting Fields

Task	Select the workflow task that you want to associate the report with. For example, if you want to print a building permit at the end of the record acceptance process, you might select Application Acceptance.
Status	Select the workflow task status that should trigger the report. For example, if you want to print a building permit at the end of the application acceptance process, you might select Complete.
Report Type	Select the report type for the report you want to print. The report might be an Oracle report or an Accela Report Writer report.
Report	Select the report that should run automatically. For example, if you want to print a building permit at the end of the record acceptance process, you might select Building Permit.

Assignments, Skillsets, and Workloads

This section contains the following topics:

Related Information

[Setting up an Automatic Assignment](#)

[Making Workflow Task Assignments](#)

Setting up an Automatic Assignment

Topics

- [Setting up Workloads](#)
- [Setting up Skillsets](#)

Setting up Workloads

To use Civic Platform's automatic assignment, you must weight the work performed to resolve certain types of records. This configuration allows Civic Platform to match the work to the best skillset to perform the tasks.

Topics

- [Creating a Workload](#)
- [Editing a Workload](#)
- [Deleting a Workload](#)

Creating a Workload

This section describes how you create workloads that Civic Platform uses to determine which skillset to assign the work to.

To create a workload object

1. Access the Workload portlet ([Accessing the Workload Portlet](#)).
2. Click **New**.
Civic Platform displays the workload details.
3. Complete the Workload fields that display. For a list of field descriptions, see [Table 83: Workload Detail](#).
4. Click **Submit**.
Civic Platform creates the workload and adds it to the workload list.

Table 83: Workload Detail

Description	Enter a description of the workload.
Enabled	Select Yes to enable the workload or No to disable the workload. Civic Platform does not assign disabled workloads to skillsets.
Literal Value	Enter a literal value to compare the object against. The value you enter must exactly match the values your agency uses. For example, if your agency uses the date format of MM/DD/YYYY, you must provide the literal date value of 11/16/2007 in this field.
Object	You can associate workloads with specific objects and object properties. Civic Platform can then allocate the workloads to skillsets associated with these objects. To associate the workload with an object, select the desired object. For example, a record. Civic Platform populates the Property drop-down with the properties for the object you selected.
Operator	Select an operator to compare the object against.
Property	Select a property for the object you selected in the Object drop-down.
Type	From the drop-down, select the type of workload you are creating.

Editing a Workload

This section describes how you edit workload objects.

To edit a workload object

1. Access the Workload portlet ([Accessing the Workload Portlet](#)).
2. Click the link in the **Workload ID** column for the workload you want to edit.
Civic Platform displays the workload details.
3. Update the Workload fields that display. For a list of field descriptions, see [Table 83: Workload Detail](#).
4. Click **Submit**.
Civic Platform saves your changes and reflects the workload list to reflect them.

Deleting a Workload

This section describes how you delete workload objects.

To delete a workload object

1. Access the Workload portlet ([Accessing the Workload Portlet](#)).
2. Select the workload you want to delete.
3. Click **Delete**.

Civic Platform removes the workload from the workload list.

Setting up Skillsets

To use Civic Platform's automatic assignment, you must set up the skillsets available at your agency. Civic Platform can then assign appropriate workloads to the department or employee with the best skillset necessary to perform the work.

Topics

- [Creating a Skillset](#)
- [Editing a Skillset](#)
- [Deleting a Skillset](#)

Creating a Skillset

This section describes how you create skillset objects that Civic Platform uses when determining where to assign workloads.

To create a skillset

1. Access the Skillset portlet ([Accessing the Skillset Portlet](#)).

2. Click **New**.

Civic Platform displays a blank form in the record detail area.

Category *	Value *	Department *
--Select--	<input type="text"/>	--Select--
User ID	Current User	Expertise *
--Select--	--Select--	

3. Complete the Skillset fields that display. For a list of field descriptions, see [Table 84: Skillset Detail](#).

4. Click **Submit**.

Civic Platform saves the skillset and updates the skillset list.

Table 84: Skillset Detail

Category	Select the category from the drop-down list. SR Type is the only category currently available.
Value	Click the Selection icon to select a value from the display.
Department	Select the department where you want to assign the skillset.
User ID	If you are creating a skillset for an individual user, use the drop-down to select the user ID of the staff member that belongs to the department you selected.

Expertise	Select the level of expertise the person has in the skills. Civic Platform assigns the skillset points for the skillset to workload ratio based on this selection. The possible values are as follows: Novice = 1 point Intermediate = 5 points Expert = 10 points.
-----------	---

Editing a Skillset

This section describes how to edit skillsets.

To edit a skillset

1. Access the Skillset portlet ([Accessing the Skillset Portlet](#)).
2. Click the link in the **Category** column for the skillset you want to edit.
Civic Platform displays the skillset details.
3. Update the Skillset fields that display. For a list of field descriptions, see [Table 84: Skillset Detail](#).
4. Click **Submit**.
Civic Platform saves the skillset and updates the skillset list.

Deleting a Skillset

This section describes how to delete skillsets.

To delete a skillset

1. Access the Skillset portlet ([Accessing the Skillset Portlet](#)).
2. Select workload you want to delete.
3. Click **Delete**.
Civic Platform deletes the skillset and updates the skillset list.

Making Workflow Task Assignments

This section describes how to search for and assign workflow tasks.

To make a workflow task assignment

1. Access the Assign Task portlet ([Accessing the Assign Task Portlet](#)).
2. Select each task you want to assign or reassign. If you do not see the task you are looking for, Click **Search** and complete the resulting fields. For a list of search field descriptions, see [Table 85: Workflow Task Search Fields](#).

Table 85: Workflow Task Search Fields

Alternate ID	If your agency uses Alternate IDs to display permit application numbers, enter the alternate identification number for the permit application that contains the workflow task you want to find.
Record ID	If your agency uses Record IDs to display permit application numbers, enter the record identification number of the permit application that contains the workflow task you want to find.
Date	Use the calendar icon to select the date range or exact creation date of the workflow task. You set the default date range at the Super Agency level in the Workflow Assign Task Date From Default Value field.

Department	Use the drop down list to choose the department responsible for the workflow task.
Staff	This drop-down list filters based on the selected department. Select the staff member responsible for the workflow task from the drop down list.
Task	Enter the name of the workflow task, such as Application Acceptance or Water Pollution Control.

3. Click Assign.

Civic Platform displays the assignment details.

The screenshot shows two parts of the 'Assign Task' interface. The top part is a grid of tasks assigned to 'John Q Smith'. The columns are: Due Date, Task, Status, Record ID, Address, Service Request Type, Application Name, Owner Name, and Alternate ID. The bottom part is a form for assigning a new task, with fields for Department, Staff, Due Date, and Workflow Calendar, all enclosed in a red box.

Due Date	Task	Status	Record ID	Address	Service Request Type	Application Name	Owner Name	Alternate ID
02/19/2013	BLD Admin-1	13CAP-00000-000KS	Building/linda/linda13/linda01	MARAC MO	13CAP-00000731			
02/20/2013	BLD Admin-2	13CAP-00000-000KS	Building/linda/linda13/linda01	MARAC MO	13CAP-00000731			
02/06/2013	BLD Issued-1	No Change	13CAP-00000-001XR	Building/linda/linda13/linda01		13CAP-00002467		
02/03/2013	Application Acceptance	No Change	13CAP-00000-0021A	Building/linda/linda13/linda01		13CAP-00002591		
02/07/2013	BLD Admin		13CAP-00000-00285	Building/ALM/ALM/ALM	11111	13CAP-00002835		
02/08/2013	BLD Construction Debris-victor test		13CAP-00000-0028H	Building/Allen/Allen/Allen		13CAP-00002847		
02/08/2013	BLD Issued-1	No Change	13CAP-00000-0029F	Building/linda/linda13/linda01		13CAP-00002881		

Assign Task

Menu ▾ Assign Search Help

Assigned to: John Q Smith

Department * Current Department
--Select Department--

Staff * Current User
--Select Staff-- Check Availability

Due Date

Workflow Calendar
--Select--

Submit Reset Cancel Help

4. Complete the Workflow Assign Task fields and click Submit. For a complete list of field descriptions, see [Table 86: Workflow Assign Task Fields](#).

Civic Platform confirms the task assignment.

Assign Task									
	Due Date	Task	Status	Record ID	Address	Service Request Type	Application Name	Owner Name	Alternate ID
Assigned to: John Q Smith									
<input type="checkbox"/>	02/19/2013	BLD Admin-1		13CAP-00000-000KS		Building/linda/linda13/linda01	MARAC MO	13CAP-00000731	
<input type="checkbox"/>	02/06/2013	BLD Issued-1	No Change	13CAP-00000-001XR		Building/linda/linda13/linda01		13CAP-0002467	
<input type="checkbox"/>	02/03/2013	Application Acceptance	No Change	13CAP-00000-0021A		Building/linda/linda13/linda01		13CAP-0002591	
<input type="checkbox"/>	02/07/2013	BLD Admin		13CAP-00000-00285		Building/ALM/ALM/ALM	11111	13CAP-0002835	
<input type="checkbox"/>	02/08/2013	BLD Construction Debris-victor test		13CAP-00000-0028H		Building/Allen/Allen/Allen		13CAP-0002847	
<input type="checkbox"/>	02/08/2013	BLD Issued-1	No Change	13CAP-00000-0029F		Building/linda/linda13/linda01		13CAP-0002881	
<input type="checkbox"/>	02/06/2013	Application Acceptance	No Change	13CAP-00000-0029F		Building/linda/linda13/linda01		13CAP-0002881	

Tasks assigned successfully.

Table 86: Workflow Assign Task Fields

Department	Use the drop down list to choose the department responsible for the workflow task.
Due Date	Use the calendar to choose the date by which the workflow task must be complete.
Staff	Use the drop-down menu to select the staff member responsible for the workflow task. Click Current User to populate this field with the current user's name.
Workflow Calendar	Use the drop down list to choose the workflow calendar the workflow task applies to.

Table 87: Task Detail Fields

Action By (Department)	The department that last updated the task status.
Action By (Staff)	The individual who last updated the task status.
Assigned Date	The date of the task assignment or the date of changes to the task assignment.
Assigned To (Department)	The department currently responsible for completing the task.
Assigned To (Staff)	The individual currently responsible for completing the task.
Record ID	The record to which the task belongs.
Record Type	The type of record to which the task belongs.
Comments	Any comments about the current status.
Due Date	The expected completion date for the task. If you are searching for a task, you can click the calendar icon located next to the From and To fields to specify a date range. Civic Platform supplies these dates in the corresponding fields.
Duration (Days)	The estimated number of days necessary to complete this task. Your system administrator determines this value when setting up the standard workflow process.
Parent Task	If the current task is a sub-task, this is a description of the parent task that the sub-task belongs to.
Status	The current status of the task.
Status Date	The date when the task reached its current status.
Task	The name of the task.

Managing Activities

Topics

- [Adding an Activity to a Workflow Process](#)
- [Editing a Workflow Process Activity](#)
- [Deleting an Activity from a Workflow Process](#)

Adding an Activity to a Workflow Process

When you add an activity, you must first indicate the process and task to which you are adding. Unlike other pages in Civic Platform, you cannot search for an activity or a task or a process; you drill in. Then you enter the activity name and description that you're adding.

To add an activity to a workflow process

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Review > Activity**.
Civic Platform displays the Workflow Process List browse page. If Civic Platform displays the Task List browse page for a process you do not want, click the “browse different workflow process” link that appears to the right of the process code.
3. Click the red dot that appears next to the process that you want.
Civic Platform displays the Workflow Task List browse page.
4. Click the red dot that appears next to the task that you want.
Civic Platform displays the Task Activity List browse page.
5. Click **Add**.
6. Complete these fields:

Activity Code	Enter a code, or abbreviation, that identifies the activity.
Activity Description	Enter a brief description to explain what the task involves.
7. Click **Submit**.

Editing a Workflow Process Activity

After you add an activity to a workflow task, you can edit the activity code and its description. Any changes you make to an activity (other than adding a new activity) do not affect existing applications. For example, when you delete an activity it does not delete the sub-task from the application's workflow. Your changes affect only new applications.

To edit an activity for a workflow process

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Review > Activity**.
Civic Platform displays the Workflow Process List browse page. If Civic Platform displays the Task List browse page for a process you do not want, click the “browse different workflow process” link that appears to the right of the process code.

3. Click the red dot that appears next to the process that you want.
Civic Platform displays the Workflow Task List browse page.
4. Click the red dot that appears next to the task that you want
Civic Platform displays the Task Activity List browse page.
5. Click the red dot that appears next to the activity that you want.
6. Update these fields:

Activity Code	Enter a code, or abbreviation, that identifies the activity.
Activity Description	Enter a brief description to explain what the task involves.
7. Click **Submit**.

Deleting an Activity from a Workflow Process

After you add an activity, you can delete it, as needed. Deleting an activity does not delete the sub-task from an existing application's workflow. Your changes affect only new applications.

To delete an activity from a workflow process

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Review > Activity**.
Civic Platform displays the Workflow Process List browse page.
3. If Civic Platform displays the Task List browse page for a process you do not want, click the “browse different workflow process” link that appears to the right of the process code.
4. Click the red dot that appears next to the process that you want.
Civic Platform displays the Workflow Task List browse page.
5. Click the red dot that appears next to the task that you want
Civic Platform displays the Task Activity List browse page.
6. Click **Delete** next to the activity that you want.
7. Click **OK**.

Using Expression Builder

Expression Builder provides an easy way to define expressions that perform calculations, provide drop-down lists, or auto-populate fields based on the value the user selects. Well-defined expressions help reduce data entry work and minimize data entry errors.

Click a topic title below for full details.

Related Information

[Supported Environments](#)

[Sample Use Cases](#)

[Creating Expressions](#)

[Searching for an Expression](#)

[Expression Builder Scenarios](#)

Supported Environments

You can create an expression for either Civic Platform, or Citizen Access, or both. Civic Platform does not support expressions for Authorized Service Customer and Authorized Service Customer Address. Citizen Access supports expressions for ASI, ASI Table, Address, Authorized Service Customer, Authorized Service Customer Address, Contact, Contact 1/2/3, Contact Address, Fee, Professionals, and Reference Contact Address.

You can use Expression Builder with the following portlets.

- ASI
- ASI Table
- Address
- Applicant
- Asset
- Asset Condition Assessment
- Authorized Service Customer
- Authorized Service Customer Address
- Condition
- Condition of Approval
- Contact, Contact 1/2/3
- Contact Address
- Fees
- Parcel
- Payment

- Professional
- Record Detail
- Reference Address
- Reference Condition
- Reference Contact
- Reference Parcel
- Workflow

Sample Use Cases

Building expressions enables you to perform the following types of actions in Citizen Access:

- Validate fields in licensed professional, ASI, and ASI table components
- Populate fields that are not visible to public users
- Gather the sum of field values
- Update fields that meet the criteria of the expression
- Populate sections in an online application, and then edit those sections in the review page

Expression Builder User Interface

You can create expressions in either wizard mode or script mode. For an illustration of the expression creation portlet in script mode, see [Figure 26: Expression Creation Portlet](#).

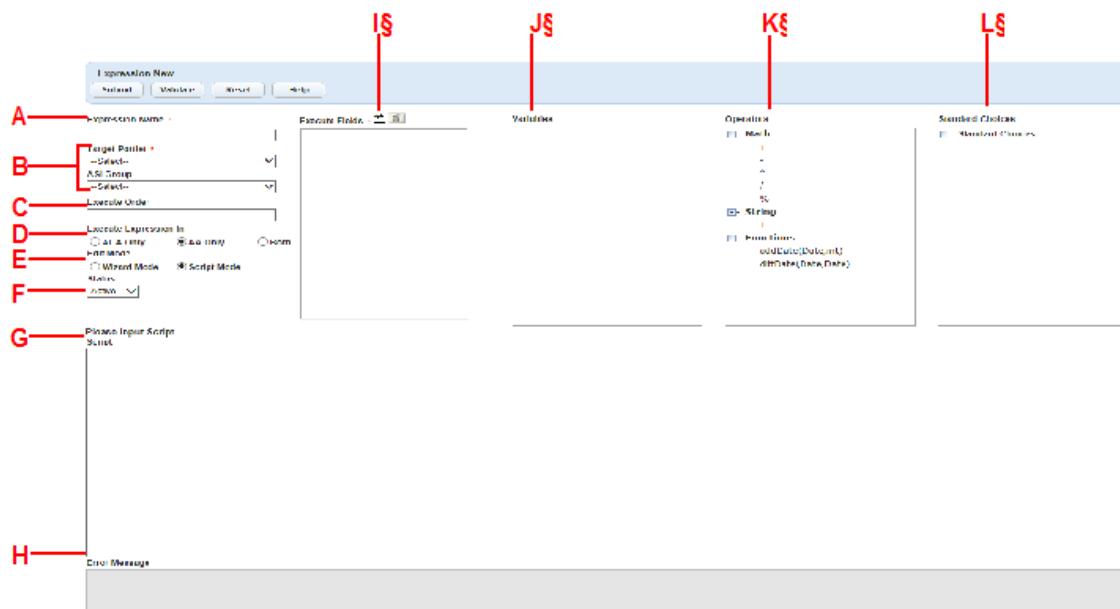


Figure 26: Expression Creation Portlet

- A Expression Name. Identifies the expression.
- B Target Scope (Target Portlet, ASI Group, etc). Specify what scope that the expression works in.
- C Execute Order. Specify the order to execute each expression.
- D Execute Expression In. Specify where the expression applies: Citizen Access, Civic Platform, or both.
- E Edit Mode. Specify whether you want to edit the expression in wizard mode or script mode.
- F Status. Specify the status of the expression, active or inactive.
- G Expression Area. If you select Script Mode, write the customized EMSE scripts for the desired expression in the script entry area. If you select Wizard Mode, enter the expression criteria and the values, as the wizard guides you through the process. S
- H Error Message. Display the error details if the EMSE scripts fail to pass validation.
- I Execute Fields. Pick one or more fields. When the user tabs or moves focus off of an Execute Field, the expression executes.
- J Variables. Display available fields in the target scope. You can either select the field you want to populate with the expression, or use some fields in the criteria. Variables store field information temporarily as a program runs.
- K Operators. Use these basic mathematical symbols and date values in the expression. The “%” is the modulus, it divides one operand by another and returns the remainder as its result.
- L Standard Choices. Lists all Civic Platform Standard Choices and their values. Include these values in the Expressions area.

Topics

- [Creating Expressions](#)
- [Searching for an Expression](#)
- [Expression Builder Scenarios](#)

Creating Expressions

You can create new expressions or modify existing expressions. Expression Builder provides a wizard for building new expressions. You can also use scripts to build new expressions. Refer to the *Accela Civic Platform Scripting Guide*. To learn about specific uses of Expression Builder and its effect on the Civic Platform daily users, see the several scenarios introduced in [Demonstrating Expressions with Scenarios](#).

Topics

- [Accessing the Expression Creation Portlet](#)
- [Configuring the Expression](#)
- [Building the Expression in Wizard Mode](#)

Accessing the Expression Creation Portlet

You can access the expression creation portlet from the Administration Setup portlet.

To access the expression creation portlet in Expression Builder

1. Go to **Administration > Application > Expression Builder**.
2. Click **New** to create a new expression.

Civic Platform displays the Expression Builder tool.

The screenshot shows the Expression Builder tool with the following configuration:

- Expression Name:** (empty)
- Target Portlet:** -Select- (dropdown menu)
- ASI Group:** -Select- (dropdown menu)
- Execute Order:** (empty)
- Execute Expression In:** AA Only (radio button selected)
- Edit Mode:** Script Mode (radio button selected)
- Status:** Active (dropdown menu)
- Please input Script:** (large text area)
- Operators:** Math (+, -, *, /, %), String (+, -), Functions (addDate(Date,int), diffDate(Date,Date))
- Variables:** (empty)
- Standard Choices:** Standard Choices (empty)

Configuring the Expression

Before you start to build the expression, configure the expression basics including the expression name, the target scope, and how to execute the expression.

To configure the expression

1. Enter an **Expression Name** to describe the purpose of the expression, up to 60 characters including spaces.
2. Specify the **Target Portlet** where users access the expression.
3. Specify the **Custom Fields Group**, Custom List subgroup, or the template attributes associated with the target portlet, which contain the fields you want use in your expression.

For the types of fields that you can specify with a target portlet, see [Associated Field Types for Expression Creation in Target Portlet](#).

You can hover over **Custom Fields Group** to see a list of record types relevant to the group.

4. Define the order in the **Execute Order** field to trigger the expressions that work on the same field.
5. From the **Execute Expression In** area, choose what type of user you want to expose the expression to:

ACA Only	Both registered users and anonymous Citizen Access users can access the expression.
Civic Platform only	Only Civic Platform users can access the expression.
Both	Exposes the expression to both Citizen Access and Civic Platform users.



Note:

Citizen Access supports expressions for fields from Custom Fields, Custom Lists, Contacts (including generic template fields, template table fields, and people template fields), Fees, and Licensed Professionals.

6. Select an **Edit Mode**. The Edit Mode determines whether you edit the expression by wizard or EMSE script.

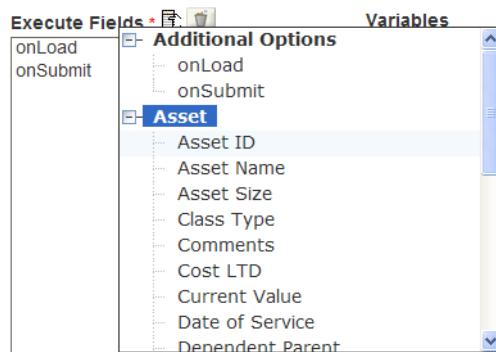
The Wizard Mode displays the Expressions and Criteria wizard to assist you in building the expressions. See [Building the Expression in Wizard Mode](#).

The Script Mode displays the Expression script text area in which you can edit the EMSE script manually. See the *Accela Civic Platform Scripting Guide*.

You can switch back and forth between modes, as appropriate.

7. Select the **Status** of the expression. All expressions are active by default. If you set the status of an expression to inactive, the expression does not execute when the expression criteria are met.
8. Click the **Execute Fields** picker and select one or more fields. When the user tabs or moves focus off of an Execute Field, the expression executes.
 - a. Click the (+) sign to expand the list of items.

The fields within each portlet, the associated fields, and Additional Options for onLoad and onSubmit display.



- b. Click an item to add it to the Execute Fields list.

The selected **Custom Fields Group** activates and filters the Custom Lists Subgroup drop-down list. The **Additional Options** list provides the possible events that can trigger the expression:

- **onLoad** executes the expression when you create a new record that meets the expression criteria. The onLoad event occurs immediately when a page loads. For example, default the status to Accepted when a user creates a new Building Record Type.
- **onSubmit** executes the expression upon saving a record. The onSubmit event occurs when the user clicks Submit on the form. For example, if the user changes the status to Accepted by entering "A" in the appropriate field.
- **onPopulate** executes the expression when data in the selected field populates based on a search result. It is available when Professional, Contact Address, or Reference Contact Address is the selected target portlet. For example, the following actions can trigger the expression: when the user searches for and selects a Licensed Professional in an application, or when the user clicks the Validate button in the contact address form and selects an address to add in the form.

The following Standard Choices must be have the indicated configurations in order for the onPopulate option to be available for the Professional portlet:

NEW_SPEAR_FORM_ENABLE	Enabled
MULTIPLE_LICENSE_PROFESSIONAL	Disabled
MULTIPLE_APO_GIS_SELECTION	Disabled

- **onASITRowSubmit.**This event is available only when Custom Lists is the target portlet, and only works in Citizen Access. When a public user submits a new or updated Custom List table row in Citizen Access, if the criteria of an onASITRowSubmit expression are all met, Citizen Access triggers the expression. If you define an onASITRowSubmit expression which sets the blockSubmit

property of the Custom List table form to true under certain criteria, Citizen Access can block the submission of Custom List table rows when the criteria are met.

Table 88: Associated Field Types for Expression Creation in Target Portlet

Target Portlet	Associated Field Types	Executable in Civic Platform?	Executable in Citizen Access?
Custom Fields	Custom Fields Group	Y	Y
Custom Lists	Custom Fields Group and Custom List Subgroup	Y	Y
Address	Custom Fields Group	Y	Y
Applicant	Custom Fields Group, Contact Type, Contact Template, and Template Table if any associated with the selected contact template	Y	N
Asset	Attribute Template, and Attribute Table if any associated with the selected attribute template	Y	N
Asset Condition Assessment	Condition Assessment	Y	N
Authorized Service Customer	-	N	Y
Authorized Service Customer Address	-	N	Y
Condition	Custom Fields Group, Template Form, and Template Table if any associated with the selected template form	Y	N
Condition of Approval	Custom Fields Group, Template Form, and Template Table if any associated with the selected template form	Y	N
Contact (and Contact 1, 2, 3)	Custom Fields Group, Contact Type, Contact Template, and Template Table if any associated with the selected contact template	Y	Y
Contact Address	Custom Fields Group	Y	Y
Fees	Custom Fields Group	Y	Y
Parcel	Custom Fields Group	Y	N
Payment	Custom Fields Group	Y	N
Professional	Custom Fields Group	Y	Y
Record Detail	Custom Fields Group	Y	N
Reference Address	-	Y	N
Reference Condition	Condition Entity, Template Form, and Template Table if any associated with the selected template form	Y	N
Reference Contact	Contact Type, Contact Template, and Template Table if any associated with the selected contact template	Y	Y

Target Portlet	Associated Field Types	Executable in Civic Platform?	Executable in Citizen Access?
Reference Contact Address	-	Y	Y
Reference Parcel	-	Y	N
Workflow	Custom Fields Group, Workflow, Process, Task Specific Info	Y	N

Building the Expression in Wizard Mode

If you select Wizard Mode to build the expression, you can fill the field names, corresponding expressions, and criteria values in the Expressions and Criteria areas of the wizard.

To build the expression in wizard mode

1. Use the **Expressions** area to define the field in the expression, and define the way the expression works on the field.

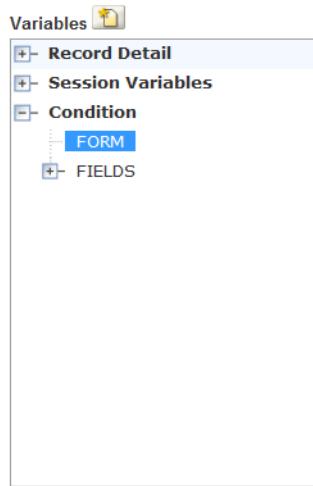
Expressions		
Field Name *	Property	Calculate Expression *
read-only	=	TRUE



Note:

If you specify Custom List as the target portlet for the expression, or select a Custom List Subgroup or attribute table in the target scope, you can only build the expression for the selected table. For a detailed use-case of this feature, see [Adding a Row in an Asset Attribute Table](#).

- a. Select the field on which the expression affects. You can only select a target portlet field.
- b. Expand the plus sign next to the target portlet in the **Variables** navigation tree to locate a variable. The variables navigation tree displays the available fields for your selection.



- c. Click the variable. The variable populates in the Field Name.

You can select "FORM" to execute the expression on the whole target portlet. You can also select a field to change the property of the field.

- d. Specify a **Property** type for the field. The Property field identifies the type of expression. For example, if you set the field to read-only, the Property becomes read-only.

Value

Assigns the value in the Calculate Expression field to the field.

Required	Sets the field to required. The Calculate Expression field defaults to True, but you can change it to False.
Read-only	Sets the field to read-only. The Calculate Expression field defaults to True, but you can change it to False.
Message	If you add "FORM" in the Field Name, displays a message in the target portlet. If you add a field in the Field Name, displays a message next to the field.
blockSubmit	If you add "FORM" in the Field Name, this property is available for blocking the submission of the target portlet.



Note:

There is a limitation with contact expressions in Citizen Access. If you are using a contact expression to display a message on the contact form, the "Execute Fields" box of the expression must contain the "onSubmit" option for the message to display when users submit the form. Otherwise, the message cannot display.

- e. Click the **Calculate Expression** field and then, as required for the expression, navigate to the Variables, Operators, or Standard Choices navigation trees to locate the field, operator, or value to add to the expression.

The Variables navigation tree includes **Session Variables** which are the frequently used runtime variables that are standard with Civic Platform. Session variables are available in the WHERE clause of a statement. Session variables display between sets of double dollar signs, for example,

```
[$$capID1$$]
```

. See [Session Variables](#).

Use the **Operators** navigation tree to calculate the expression.

Math operators	Lists mathematical symbols [+], [-], [*], [/] for operation. The "%" is the modulus, it divides one operand by another and returns the remainder as its result.
String operators	Joins two strings.
Custom Fields Table-lookup() Function	Populates fields in the expression with columns from Custom Fields lookup tables.
Aggregate Function	Aggregates multiple values from the Custom Fields table, fees, the condition template table, or the asset attribute table.
fireEMSE Function	Fires an EMSE script.
addDate(Date, int) Function	Returns the date appended with a certain date interval.
diffDate(Date, Date)	Returns the interval between two dates.

- f. The **Standard Choices** navigation tree lists each Standard Choice available in Civic Platform along with its values that you can use in calculating the expression. The navigation tree lists both enabled and disabled Standard Choices. For example, if you want to create an action based on when the Status is Completed, locate the Standard Choice "STATUSCOMPLETED" and use its value in your expression.
 - g. To add more expression lines click **Add Expression Line** in the Expressions area.
To remove an expression line, select it, and then click **Delete Criteria Line**.
2. Use the **Criteria** area to define the expression criteria.



- Click **Add Criteria Line** in the Criteria area to add criteria lines.
- Click the **Field Name**. Civic Platform uses the Field Name in the criteria for the expression.
- Locate a variable in the **Variables** navigation tree and then click it. The variable populates in the Field Name.
- Select a logical operator from the **Operator** drop-down list to identify the criteria for the expression.
- Specify the **Value** for the criteria. You can set this to a static field value, a value from the Custom Fields lookup table, a Standard Choice value, or a session variable.
See [Creating Custom Fields](#) for information on Custom Fields lookup tables.
You can use Standard Choice values here as static values.
To look up a Session Variable and its value, click the Value field in the Criteria section, navigate to the Session Variables navigation tree, and then click the value you want. The variable populates in the Value field for the Criteria.
- The **Prefix** is the starting parenthesis in a criteria line (also called “condition”). For Example:

```
(Due Date <= $$TODAY$$ AND
Status = Approved) OR (Est Date > $$TODAY$$)
```

Both embedded conditions and parallel conditions work in the criteria. You can type one or more “(“ characters as the prefix, or leave it blank.

Embedded condition: (...(...)...)

Parallel condition: (..)...(..)

- The **Suffix** is the end parenthesis in a criteria line (also called “condition”). For Example:

```
(Due Date <= $$TODAY$$ AND
Status = Approved) OR (Est Date > $$TODAY$$)
```

You can type one or more “)” characters as the prefix, or leave it blank.

- Select **AND/OR** options to connect multiple criteria lines.

- Click **Validate** to review the expression for errors.

The Validate button verifies that the syntax is correct. The Validate button does not test field data types or the fields used in the expression.

- Click **Submit** to save the new expression in wizard mode.

Table 89: Session Variables

Variable	Name	Description
\$\$ID\$\$	ID1	Retrieves the record ID from a specific portlet.
\$\$ID\$\$	ID2	Retrieves a second record ID from a specific portlet.
\$\$capID1\$\$	CAPID1	Retrieves the first 5 characters of the record ID from a specific portlet. Example: CAPID1 = 01BLD-00000-00018

Variable	Name	Description
\$\$capID2\$\$	CAPID2	Retrieves the second 5 characters of the record ID from a specific portlet. Example: CAPID2 = 01BLD-00000-00018
\$\$capID3\$\$	CAPID3	Retrieves the last 5 characters of the record ID from a specific portlet. Example: CAPID3 = 01BLD-00000-00018
\$\$department\$\$	Department	Retrieves the department of the current user.
\$\$firstName\$\$, \$\$lastName\$\$, \$\$middleName\$\$	First Name Last Name Middle Name	Obtains first, last, middle name.
\$\$gaUserID\$\$	GA User ID	Retrieves the ID of the current user.
\$\$module\$\$	Module	Retrieves the module from a specific portlet.
\$\$portletID\$\$	Portlet ID	Retrieves information on a portlet, such as a field name.
\$\$publicuser_email\$\$	The public user email id used in ACA.	Retrieves the public user email.
\$\$servProvCode\$\$	Service Provider Code	Retrieves the ID for the agency.
\$\$today\$\$	Today	Retrieves today's date. The workstation's system date 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.
\$\$userfullname\$\$	User Full Name	Retrieves the user's full name.
\$\$userGroup\$\$	User Group	Retrieves the group of the logged-in user.
\$\$userID\$\$	User ID	Retrieves the ID of the logged-in user.

Searching for an Expression

You can search for any existing expression.

To search for an expression

1. Access the Expression Builder portlet ([Accessing the Expression Builder Portlet](#)).
2. Click **Search**.
Civic Platform displays the expression search portlet.
3. Enter search criteria and then click **Submit**.

Expression Builder Scenarios

To learn about specific uses of Expression Builder and its effect on the Civic Platform daily user, review the scenarios in this section. The scenarios include screen shots that depict both the configuration details for the administrator who creates the expression, and the user's experience when accessing the fields.

Topics

- [Populating a Field When Creating a Record Type](#)
- [Adding a Row in an Asset Attribute Table](#)
- [Populating Fields in Custom Fields Section](#)

Populating a Field When Creating a Record Type

This scenario explains how to create the expression criteria that automatically set the Status to "Processing" when a user creates a specific record type. The expression uses the "onLoad" function for the record type of Building/Plan Review/Zoning Analysis and identifies the Target Portlet of Record Detail.

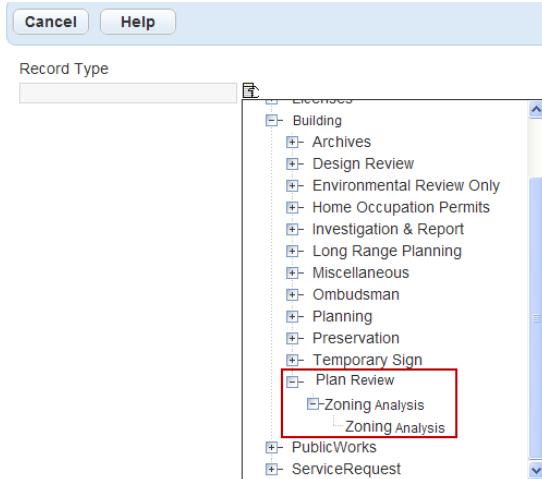
To build the expression criteria, refer to the steps in [How to create the execute fields for onLoad function for a new record](#).

To see the effect of this expression from a user experience, refer to [Where the Status field populates as "Processing" for the user](#).

For an overview of the user interface and its elements, see [Figure 26: Expression Creation Portlet](#).

Where the Status field populates as "Processing" for the user

1. User creates a new record type of Building/Plan Review/Zoning Analysis/Zoning Analysis. Civic Platform displays the application type picker.



Civic Platform loads the new application type and the status automatically updates to "Processing."

The screenshot shows the 'Record Detail' section of the Civic Platform. At the top, there are buttons for Submit, Save without Submit, Validate, Estimate Fee, Reset, Cancel, and Help. Below these, the 'Record Detail' section is labeled with a required field indicator (*). It includes fields for Application No. (with a dropdown menu), Type (Building/Plan Review/Zoning Analysis/Zoning Analysis), Opened Date (03/07/2013), Application Name, Detailed Description (with a check spelling link), Assigned to Department (Current Department), Assigned to Staff (Current User), and Status (Processing, highlighted with a red border). The 'Status' field has a dropdown menu.

How to create the execute fields for onLoad function for a new record

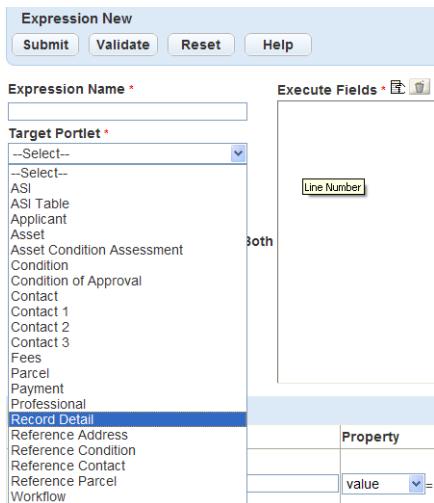
1. Create a New expression and navigate to the Expression Name field.

Civic Platform displays the New Expression fields where you define the criteria.

The screenshot shows the 'Expression New' dialog box. It includes fields for Expression Name, Target Portlet (dropdown menu), ASI Group (dropdown menu), Execute Order, Execute Expression In (radio buttons for ACA Only, AA Only, Both), Edit Mode (radio buttons for Wizard Mode, Script Mode, Status Active dropdown), and a large 'Please input Script' area where the user can type the script. On the right side, there are sections for Variables, Operators (Math, String, Functions), and Standard Choices.

2. Enter an **Expression Name**. This scenario uses New Record Status.

3. Select Record Detail from the **Target Portlet** drop-down list to specify that the expression takes effect in the Record detail area.

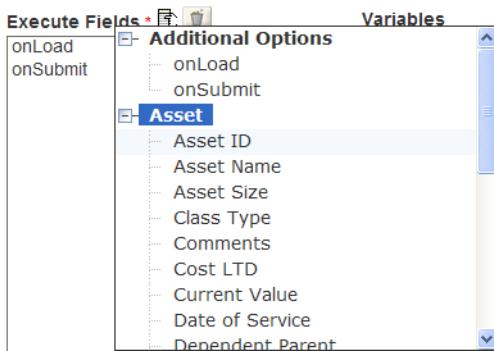


4. Select BLDG in the **Custom Fields Group** for this step. Expressions require the Target Portlet and the respective Custom Fields Group and Custom Lists Subgroup when creating or editing an expression.
5. Hover over the Custom Fields Group field, to display the associated Record type for the selected Custom Fields Group, for informational purposes.



6. Optionally, use the Execute Order field to define the order you want Civic Platform to process the expression.
7. Click the **Execute Fields** picker.

Civic Platform displays the Execute Fields list.



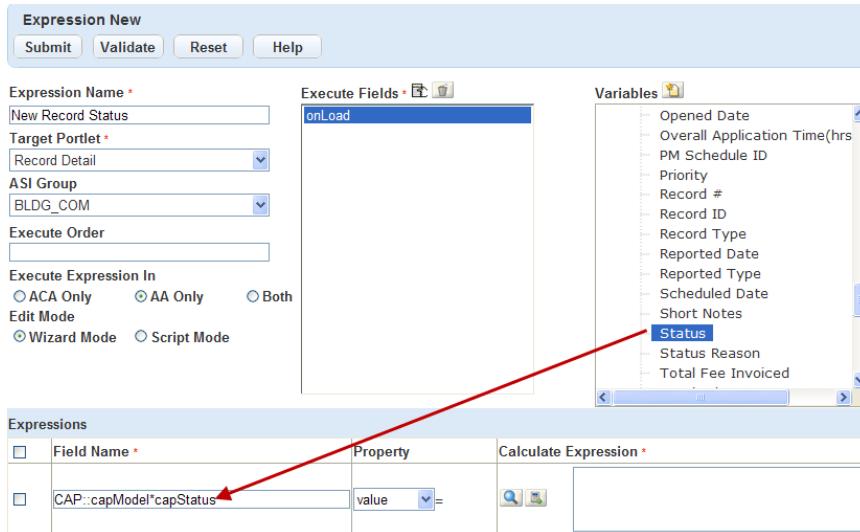
8. Expand **Additional Options** and click the **onLoad** function.
- Civic Platform loads the **onLoad** function in the Execute Fields list.
9. In the Expressions area, do the following:

- a. Single-click the **Field Name** to activate it.

b. Open the **Variables** list, and expand **Record Detail**.

c. From the Fields list click the **Status** field.

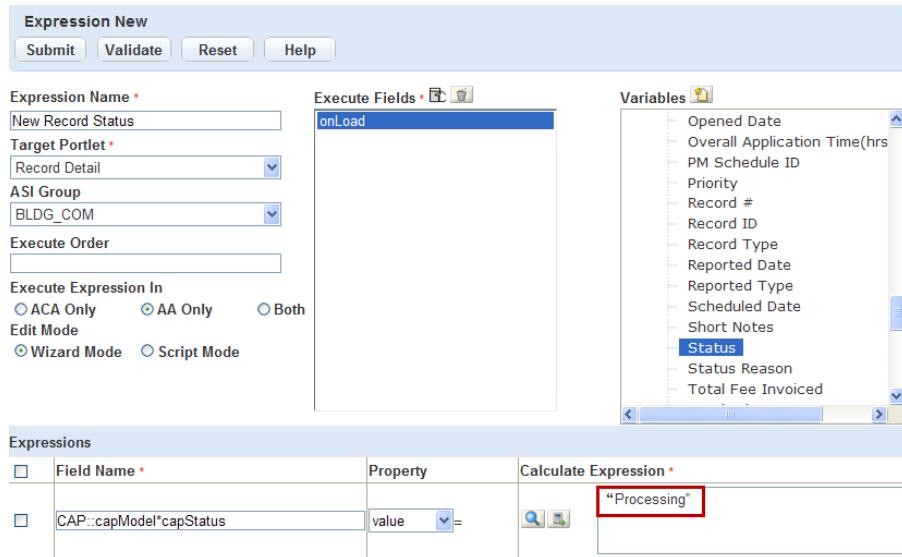
The Expressions Field Name populates with the record type and the record Status functions.



10. Click the **Calculate Expression** field to activate it.

11. In the Calculate Expression field, surround the new status for this record type in double quotes and then enter this phrase exactly: "**Processing**"

The "Processing" word is the default value displaying in the Status field when a user creates a new record type for Building/Building Permit/Residential/New.



Adding a Row in an Asset Attribute Table

This scenario explains how to create the expression that automatically adds a row into an asset attribute table when a user saves an asset.

To build the expression criteria, refer to the steps in [Adding a new attribute table row](#).

To see the effect of this expression from a user experience, refer to [Where to add a new row](#).

For an overview of the user interface and its elements, see [Figure 26: Expression Creation Portlet](#).

Where to add a new row

Where to add a new row in the attribute table of an asset

- User creates a new asset with the asset group as HVAC, and the asset type as Boiler. The asset type belongs to an asset template Mechanical - Boiler that links to the attribute table Attribute_Table_1.

Acres	Avg Demand Af (Number)	Belt 2 Qty (Number)	Belt 3 Qty (Number)	Belt Quantity (Number)	Canopyspread (Number)
220	400	21			

- The asset saves successfully with a new row automatically added in the attribute table.

Acres	Avg Demand Af (Number)	Belt 2 Qty (Number)	Belt 3 Qty (Number)	Belt Quantity (Number)	Canopyspread (Number)
220	400	21			

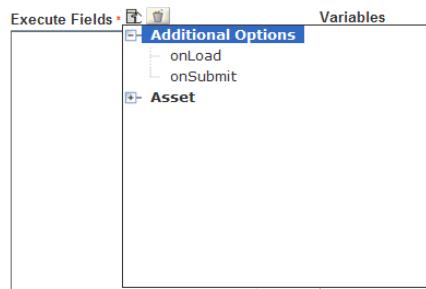
Adding a new attribute table row

How to add a new row for the attribute table fields of an asset

- Create a New expression and navigate to the Expression Name field. Civic Platform displays the New Expression fields where you define the criteria.
- Enter an **Expression Name**. This scenario uses AddRowToTable.
- Select Asset from the **Target Portlet** drop-down list, select Mechanical - Boiler from the **Attribute Template** drop-down list, and Attribute Table_1 from the **Attribute Table** drop-down list. The attribute table drop-down list shows all the attribute tables that associate with the selected attribute template.

Expression Name (Required)	AddRowToTable
Target Portlet (Required)	Asset
Attribute Template	Mechanical - Boiler
Attribute Table	Attribute Table_1

4. Click the **Execute Fields** list picker to select
Civic Platform displays the Execute Fields list.



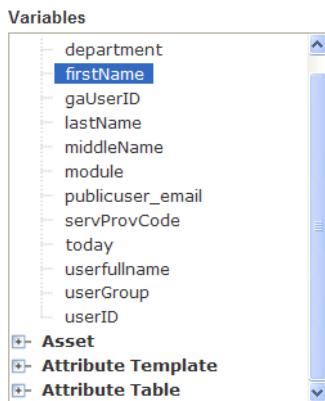
5. Expand **Additional Options** and click the **onSubmit** function.
Civic Platform loads the onSubmit function in the Execute Fields list.

6. Select **Insert Table Row** in the Expressions area.

Expressions		Behavior: <input checked="" type="radio"/> Insert Table Row <input type="radio"/> Update Table Row	Update Which Row
<input type="checkbox"/>	Field Name *	Property	Calculate Expression *
<input type="checkbox"/>		value	=

7. Assign values to the attribute table fields in the expression.

- Single-click the **Field Name** in the Expressions area to activate it.
- In the **Variables** list, expand the Fields under **Attribute Table**.



- Click the **Acres** field.

The Expressions Field Name populates with the field name.

Expressions Behavior:		<input checked="" type="radio"/> Insert Table Row	<input type="radio"/> Update Table Row			
<input type="checkbox"/>	Field Name (Required)	Property	Calculate Expression (Required)			
<input type="checkbox"/>	ASSETTB::Attribute Table_1::acres	value	=			

8. Set the **Property** in the Expressions area as “value,” and enter the numeric value in the Calculate Expression field: 220.
9. Click **Add Expression Line** to add more lines.
10. Select another field from the **Variables** list, and set its value.
11. Repeat step 10 until you assign values to all the necessary fields in the attribute table.
12. Click **Submit** to save the expression.

Populating Fields in Custom Fields Section

This section explains how to create the expression criteria that populates read-only fields in the Custom Fields Section of a record type, based on selections made. This expression uses columns and data from a Custom Fields Lookup Table named ZA-1. This expression’s name is Zoning Lookup, because it populates the appropriate references, based on the zones the user selects.

With Expression Builder, you can use the record type of Building/Plan Review/Zoning Analysis, and then identify the Target Portlet of a Custom Field, which is where the user accesses the fields. To build the expression criteria, refer to the steps in [How to prepare a Custom Fields lookup table for creating the expression](#).

To see the effect of this expression from a user experience perspective, refer to [How a user completes Custom Fields that populate messages](#).

For an overview of the user interface and its elements, see [Figure 26: Expression Creation Portlet](#).

How a user completes Custom Fields that populate messages

1. User creates a record type of Building/Plan Review/Zoning Analysis.
 2. Locate the Custom Fields section of the application. An alternate location to modify this information might be in the Zoning Analysis portlet for the record type.
- Civic Platform displays the Custom Fields in the Zoning Analysis section of the record.

Total Eligible Front Porch Area	Front Porch Deduction
Total Area	Calculated Field
Sq.ft.	Sq.ft.
<hr/>	
Zone	
--Select--	
Principal Frontage	
Permit Use	Calculated Field

3. Enter the value

110

into the Total Area (in square feet) of the **Eligible Front Porch Area** field.

4. Select

R4

from the **Zone** drop-down list.

Civic Platform populates the values for the Principal Frontage, Permit Use, and Front Porch Deduction fields.

The screenshot shows a software interface for a building permit. At the top, it displays 'Building Permit ID: 08APR-00000-00074' with buttons for Save, Reset, Help, Go To, Valuation Calc (0), Workflow, Workflow History (0), and Zoning Analysis. In the 'Zoning Analysis' section, there are two input fields: 'Total Eligible Front Porch Area' (110 Sq.ft.) and 'Front Porch Deduction' (600 Sq.ft.). Below these, a dropdown menu labeled 'Zone' is set to 'R4'. Under 'Principal Frontage', the text '27 or Sec. 6-4-1-9 (A) 3, 5a, or 5b.' is shown. Under 'Permit Use', the text 'Sec. 6-4-5-3 (B)' is shown.

How to prepare a Custom Fields lookup table for creating the expression

This scenario uses data from an existing table called Custom Fields Lookup Table called ZA-1.

The ZA-1 table contains the regulation data for zoning that populates when a user completes the Custom Fields section as they create a new record type of Building/Plan Review/Zoning Analysis/Zoning Analysis.

Reviewing this table now makes it easier to follow the scenario. Refer to [Figure 27: Custom Fields Lookup Table Structure](#) to see the structure, columns, and data in the ZA-1 table.

The screenshot shows the 'ASI Lookup Table Name: ZA-1' interface. It includes buttons for Submit, Reset, New Column, Delete Column, and Help. Below these are tabs for Table Structure and Table Data. The Table Structure tab is active, showing a table with columns for 'Lookup Table Name' (ZA-1) and 'Record Type' (Building/Plan Review/Zoning Analysis/Z). The table lists five rows corresponding to the columns in the ZA-1 table: 'Column Name', 'ZONING ANALYSIS::Zone', 'PRINCIPAL USE AND STRUCTURE::Permit Use', 'PRINCIPAL USE AND STRUCTURE::Principal Frontage', and 'ZONING ANALYSIS::Front Porch Deduction'.

Figure 27: Custom Fields Lookup Table Structure

The screenshot shows the 'ASI Lookup Table Name: ZA-1' interface with the 'Table Data' tab active. It includes buttons for Submit, Reset, New, Delete, Help, and Data Language (English (US)). The table structure is identical to Figure 27, with columns for 'Lookup Table Name' (ZA-1), 'Record Type' (Building/Plan Review/Zoning Analysis/Z), and four data columns. The data entries are:

ZONING ANALYSIS::Zone	PRINCIPAL USE AND STRUCTURE::Permit Use(Text)	PRINCIPAL USE AND STRUCTURE::Principal Frontage(Text)	ZONING ANALYSIS::Front Porch Deduction(Number)
R2	Sec. 6-4-6-3	27 or Sec. 6-4-1-9 (A) 3, 5a, c	500
R4	Sec. 6-4-6-3 (B)	27 or Sec. 6-4-1-9 (A) 3, 5a, c	600
C1a	Sec. 6-10-3-2	Building: 0', Open Parking: Lar	900

Figure 28: Custom Fields Lookup Table Data

How to create expression criteria for this Custom Fields target portlet scenario

1. Create a New expression and navigate to the Expression Name field.

Civic Platform displays a new expression fields where you define the criteria.

2. Enter an **Expression Name**. This scenario uses

BA-Zoning Lookup

3. Select Record Detail in the **Target Portlet** drop down list.

4. In the **Custom Fields Group** field, select the group that contains the record type and the fields you want to place an expression in. This scenario uses Custom Fields Group ZA-2, because it requires the record type

Building/Plan Review/Zoning Analysis/Zoning Analysis

5. For these sub-steps, add each of the fields affected within the Target Portlet into the Execute Fields list. The Execute Fields are the fields where users enter data and Civic Platform populates fields with read-only information based on the user's selections. This scenario affects these four fields:

ASI::PRINCIPAL USE AND STRUCTURE::Permit Use

ASI::PRINCIPAL USE AND STRUCTURE::Principal Frontage

ASI::ZONING ANALYSIS::Front Porch Deduction

ASI::ZONING ANALYSIS::Zone

- a. Click the **Execute Fields** picker and expand Custom Fields to locate and double-click ASI::PRINCIPAL USE AND STRUCTURE::Permit Use.

ASI::PRINCIPAL USE AND STRUCTURE::Permit Use. The Permit Use field populates with data based on what the user selects from the Zone drop-down list. In this scenario, when the user selects R4 the Permit Use field populates with specific data from the ZA-1 Custom Fields Lookup Table. Civic Platform populates the field name Permit Use into the Execute Field list.

The screenshot shows the 'Expression New' dialog box. In the 'Execute Fields' section, the field 'ASI::PRINCIPAL USE AI' is selected and highlighted with a red box. The rest of the dialog box contains standard configuration fields like 'Expression Name', 'Target Portlet', 'ASI Group', and 'Edit Mode'.

- Locate the other fields for this expression with the Execute Fields picker. Double-click each field label to add it to the Execute Field list.

ASI::PRINCIPAL USE AND STRUCTURE::Principal Frontage. The Principal Frontage field populates with data based on what the user selects from the Zone drop-down list. In this scenario, when the user selects R4 the Principal Frontage field populates with specific data from the ZA-1 Custom Fields Lookup Table.

ASI::ZONING ANALYSIS::Front Porch Deduction. This field populates with data based on the user who enters the Total Eligible Square Feet Area. See the screenshot below.

ASI::ZONING ANALYSIS::Zone. This field provides the Zone drop-down items that affect what data populates in the Principal Frontage, Permit Use, and Front Porch Deduction fields.

The screenshot shows the 'Expression New' dialog box with the 'Execute Fields' section expanded. A red arrow points to the 'ASI' node in the tree view, which is expanded to show 'PRINCIPAL USE AND STRUCTURE', 'RE-REVIEW INFO', 'ZONING ANALYSIS' (which is selected), and 'Record Detail'. Other nodes like 'Front Porch Deduction' and 'Total Eligible Front Porch Area' are also visible.

- Scroll to the Expressions area. The Expressions area is where you define the lookup criteria for each Execute Field that calculates or triggers an expression.

The screenshot shows the 'Expressions' grid. It has three columns: 'Field Name', 'Property', and 'Calculate Expression'. There is one row in the grid. The 'Field Name' column contains a blank input field. The 'Property' column contains a dropdown menu set to 'value'. The 'Calculate Expression' column contains a large text area with a search icon.

- For each field that calculates an expression, click Add Expression Line to add the field name to the Field Name field list.

8. Click the Lookup Criteria search button to locate the table name and the column. Define the lookup criteria for each Calculated Expression field for this scenario, click **Lookup Custom Fields Table**. Civic Platform displays the Lookup Criteria form.

Expressions			
<input type="checkbox"/>	Field Name *	Property	Calculate Expression * ♦
<input type="checkbox"/>	ASI Principal Use and Structure Permit Use	value	= Lookup ASI Table

Lookup Criteria			
<input type="checkbox"/>	ASI Zoning Analysis and Frontage	Lookup Table Name	--Select--
		Return Column	--Select--
Criteria			
<input type="checkbox"/>	Prefix Field Name *	Operator	Value * ♦
<input type="checkbox"/>	--Select--	=	--Select--

When defining expressions, you can use Custom Fields Lookup Tables. You can add an item to a Custom List using an expression. You can populate a field with data from the Custom List.

The benefit when using table data is that it eliminates data entry errors that might occur if the permit intake clerk has to manually open a separate document to locate the correct data and then type it into specific fields.

- a. To define the table and identify which columns to populate the data for the ASI::PRINCIPAL USE AND STRUCTURE::Principal Frontage field, follow these two sub-steps:

Define the **Lookup Table Name** for the Principal Frontage field. Choose the Custom Fields Lookup Table Name ZA?1 for this scenario.

Set the **Return Column** for Principal Frontage. The Return Column is a column in ZA-1 that contains the values that should populate data based on the values the permit intake clerk selects.

The Custom Fields Lookup Table columns for the selected Lookup Table display in the drop-down. If a user selects a column from the Variables list portlet, it defaults into this field.

- b. Use the **Field Name** drop-down list and select the field for Principal Frontage.
 - c. Set the Operator to equal (=).
 - d. Click the Value field and then use the Variables to locate and add ASI::PRINCIPAL USE AND STRUCTURE::Principal Frontage.
 - e. Click **OK** on the Lookup Criteria page.
 - f. Repeat the steps to provide a value for the Front Porch Deduction field with the correct references and correct value.
9. Click **Submit** in the Lookup Criteria form to save the expression.
Expression Builder saves the expression criteria.

Expression New

Submit **Validate** **Reset** **Help**

Expression Name * BA-Zoning Lookup	Execute Fields	Variables	Operators	Standard Choices
Target Portlet * Record Detail	ASI:PRINCIPAL USE AND STRUCTURE ASI:ZONING ANALYSIS:Front Porch Deduction	ASI	Math + - * / % String + Functions Lookup ASI Table-lookup() Aggregate fireEHS addDate(Date,int) diffDate(Date,Date)	Standard Choices A B C D E F G H I K L M N O
ASI Group ZA-2	Record Detail	ZONING ANALYSIS		
Execute Order	Session Variables			
Execute Expression In <input type="radio"/> ACA Only <input checked="" type="radio"/> AA Only <input type="radio"/> Both				
Edit Mode <input checked="" type="radio"/> Wizard Mode <input type="radio"/> Script Mode				

Expressions

Field Name *	Property	Calculate Expression *
ASI Principal Use and Structure	value	lookup(ZA-1,'PRINCIPAL USE AND STRUCTURE:Principal Frontage','[ZONING ANALYSIS:Zone]=[ASI:ZONING ANALYSIS:Zone])
ASI Zoning Analysis and Front Porch Deduction	Lookup Criteria	Lookup Table Name: ZA-1 Return Column: PRINCIPAL USE AND STRUCTURE:Principal Frontage
Criteria	Prefix Field Name *	Prefix: ZONING ANALY Operator: = Value: Suffix: AND

Setting Up Conditions

There are two kinds of conditions: conditions of approval and general conditions. The two classes share the same logic but you use them for different purposes. Use conditions of approval to define a list of requirements that citizens must meet to receive the approval for a permit or an inspection. Use a general condition to indicate a problem on the record, inspection, address, contact, or another application component. Generally, the condition severity is Lock, Hold, Notice, or Required. Administrators can manage conditions of approval and general conditions separately through the Conditions Maintenance portlet. For example, you can create a standard condition of approval for users to apply to a record and you can define the status options for conditions of approval.

All conditions and condition types support using template fields that you create using application-specific information (ASI) and application-specific information table (ASI Table) groups. To define an ASI and ASI Table Groups for a condition template, see the section, [Creating a Condition Template](#).

Administrators establish security policies for condition types, and then set permissions in the Conditions Administration portlet. You configure the policies in the Security Policies Administration portlet as explained in [Setting Up Security Policies](#) in [Setting Up Security Policies](#). To manage permissions and privileges, use the Conditions Administration portlet as explained in [Assigning Conditions](#).

Click a topic title below for full details.

Related Information

- [Managing Condition Groups and Conditions](#)
- [Establishing Condition Types](#)
- [Creating a Condition Template](#)
- [Applying Condition Audit Logs](#)
- [Assigning Conditions](#)
- [Maintaining Condition Statuses](#)
- [Configuring Reference Conditions](#)

Managing Condition Groups and Conditions

When a user applies a condition to a component, the user must supply the condition name and then choose from a list of pre-defined condition groups, condition types, and statuses that you have set up.

All conditions and condition types support using template fields similar to application-specific information (ASI) and application-specific information table (ASI Table) fields. For a more detailed explanation, see [Creating a Condition Template](#).

Topics

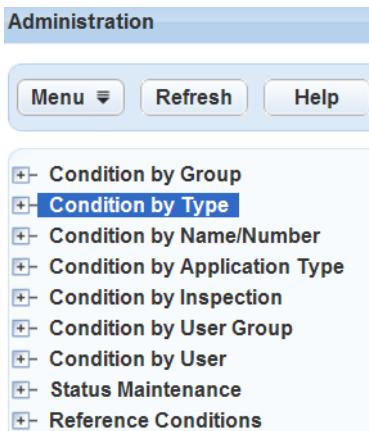
- [Adding a Condition Group and Adding a New Condition](#)
- [Searching for a Condition](#)
- [Viewing and Editing a Condition](#)
- [Copying a Condition](#)

Adding a Condition Group and Adding a New Condition

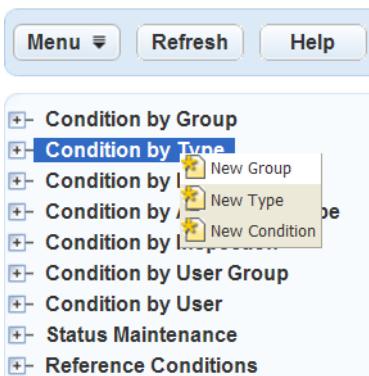
When users apply conditions to an component, they can choose from a pre-defined list of groups. You can create as many condition groups necessary. A condition group helps you organize condition types. When you create a condition group, you can add other condition types and conditions to it.

To add a condition group and create a new condition

1. Access the Conditions Maintenance portlet ([Navigating to the Setup Portlet](#)).
2. Click to highlight any of the Condition By categories in the navigation tree. For example, click the Condition By Type category.



3. Right-click the tree category in the navigation tree. For example, right-click the Condition By Type. Civic Platform opens the new pop-up window.

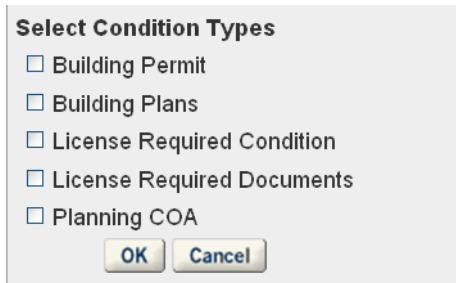


4. Click **New Group**.

Civic Platform opens the New Condition Group pop-up window.



5. Enter the new name for the condition group you need to add and click **OK**.
Civic Platform adds the new condition group to the Condition By Group tree view list.
6. To add one or more condition types to this group, take the following steps:
 - a. Right-click the group in the tree view, and click **Assign Types**.
Civic Platform displays the Select Condition Types form in a pop-up window.



- b. Click the check boxes for the condition types you want to assign, and click **OK**.
Civic Platform adds the selected condition types to the condition group.

For instructions on how to add a condition type, see [Adding a Condition Type](#).

7. To create a new condition, do one of the following:

- Click **New** in the Conditions Maintenance portlet.
- Right-click the group in the tree view, and click **New Condition**.
Civic Platform displays the New Condition form in a pop-up window.

The screenshot shows the "New Condition" form in a browser window. The form fields include:

- Condition Name ***: Text input field.
- Condition Group ***: Drop-down menu with options like "Building Permit", "Building Plans", etc.
- Condition Type ***: Drop-down menu with options like "Building Permit", "Building Plans", etc.
- Template**: Drop-down menu.
- Severity ***: Drop-down menu.
- Short Comments ***: Text area with a "check spelling" link.
- Long Comments**: Text area with a "check spelling" link.
- Resolution Action**: Text area with a "check spelling" link.
- Display Notice**: Checkboxes for "Accela Automation" (checked), "ACA" (checked), and "ACA Fee Estimate Page" (unchecked).
- Status ***: Drop-down menu with "Enabled" selected.
- Inheritable ***: Drop-down menu with "No" selected.
- Priority**: Drop-down menu.
- Public Display Message**: Text area with a "check spelling" link.
- Conditions of Approval**: Checkbox (unchecked).
- Additional Information**: Text area with a "check spelling" link.

8. Complete the **Condition Name** field.

Condition Name is the name or number for the standard condition.

When a user accesses an application and applies a condition, this is the Condition Name they select.
This field accommodates up to 255 characters.

9. Specify the **Condition Group**, and then select the **Condition Type** from the drop-down list.

The Condition Type drop-down list contains the condition types you assigned to the condition group in . If the condition type you selected associates with a template, the New Condition form refreshes and adds the template fields below the system-defined condition fields.

10. Complete the remaining fields in the New Condition form.

For an explanation of system-defined condition fields, see [Table 90: New Condition Field Descriptions and Actions](#).

For further details on the spelling checker, including how to configure it, see [Configuring Standard Comments](#). Note that the spelling checker cannot add new words to the dictionary.

11. Click **Submit**.

Civic Platform saves the completed Condition Group and applies the new condition.

Table 90: New Condition Field Descriptions and Actions

Additional Information	<p>Use this unlimited text field if the body of your comment text exceeds the character limitations of the Short Comments and Long Comments fields. This unlimited text field supports the insertion of standard comments via the Standard Comments picker. It also supports HTML formatting so that text pasted into the field from another source retains its formatting.</p> <p> Note:</p> <p>This field is not searchable. However, the ability to perform tag-based searches based on key words entered into ASI fields is available. Your agency can configure the Conditions portlet to include ASI fields for users to enter important 'searchable' words from the Additional Info field.</p>
Condition Group	<p>Select the Condition by Group name for the condition name or condition number you are creating.</p> <p>The condition group is an attribute of a condition that helps you organize condition types.</p> <p>This field accommodates up to 255 characters.</p>
Condition Name	<p>Condition Name is the name or number for the standard condition name.</p> <p>When a user accesses an application and applies a condition, this is the Condition Name they select.</p> <p>This field accommodates up to 255 characters.</p>
Condition Type	<p>Select the Condition By Type name for the condition name or condition number you are creating. The condition type is an attribute of a condition that helps you organize individual conditions. For example, you can create a "Planning" condition type for all conditions that apply only to components in the planning review stage.</p> <p>You can associate a template with a condition type, and assign users and user group permissions to a condition type. For more information about condition types, see Establishing Condition Types.</p>
Display Notice	<p>Select the options to display the notice in Civic Platform, Citizen Access, or the Citizen Access Fee Estimate Page when they apply a condition to a record or parcel. When a user accesses a record, the condition notice displays in the condition status bar. If you do not select an option, the condition notice does not display. However, the condition is applied regardless.</p>
Include In Condition Notice	<p>Select from the options provided to expose the content of the selected fields to agency users and public users. For example, if you select Short Description, Civic Platform exposes the Short Comments text.</p>

Inheritable	Inheritable is a required field. No is the default setting. If you set this to Yes, when you associate a child record with a parent record, Civic Platform checks for inheritable conditions. If found, the inheritable conditions copy to the child record with the Status of "Applied." If the parent record condition status updates (Status of "Not Applied") then the child record condition status does not update. If you set this to No Civic Platform does not copy conditions to the child record upon creating it from a parent record.
Long Comments (4000 char max)	Use this text field if the body of your condition comments exceeds the character limitations of the Short Comments field, but does not exceed the 4000 character limitation for this field. The contents of this field are searchable. This field supports the insertion of standard comments via the Standard Comments picker.
Public Display Message	This field relates only to IVR and Citizen Access. If you enter text into this field, the result in IVR and Citizen Access is: a) The text displays in the condition notice or condition status bar for the Condition Name for the public user. b) The Condition Name and Short Description do not display for the public user. If you do not enter text into this field, the result in IVR and Citizen Access is: a) The Condition Name and/or Short Description displays in the public user Condition Notice. b) If Condition Name and Short Description are de-selected, the Condition detail does not display in the Condition Notice for a public user.
Resolution Action	Enter the actions or set of tasks the user should follow to resolve the condition severity level so the user can move the application forward.
Short Comments (2000 char max)	Use this text field if the body of your condition comment does not exceed the 2000 character limitation for this field. The contents of this field are searchable. This field supports the insertion of standard comments via the Standard Comments picker. To expose the contents of this field to agency and public users, select Short Comments for the Include in Condition Notice field.
Severity	Choose a level of severity for the condition from the following: Lock: Prevents almost any operation, except operations that result in removal of the lock. Hold: Restricts the addition of an activity and editing of components. Notice: Includes special instructions to the person completing the application. It does not impede record processing. Required: Indicates that a user must complete a specified activity or field before proceeding to the next step in a workflow.  Note: The Standard Choice REMOVE_REQUIRED_IN_ADMIN_CONDITIONS determines whether the Required severity option hides or displays.
Status	Choose either Enabled or Disabled mode for the condition type. Enabled means that you can apply the Condition Name to the assigned Application Types when a user creates a new application. If you disable a condition type, it prevents users from choosing that type when applying new conditions, it does not disable existing conditions of that type. The Condition Name is still available in the conditions list for the administrator to Enable at a later date.

Template	<p>Apply a template to a condition. All template fields and template tables display at the bottom of the Condition details form. All conditions support the use of template fields which you configure through application-specific information (ASI) and application-specific information table (ASI Table) fields. For instructions on how to create a condition template, see Creating a Condition Template.</p> <p> Note:</p> <p>If the condition type you select has a template, and then you select a different template in this field, the template you select in this field applies to the condition, and Civic Platform ignores the template associated with the condition type.</p>
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Searching for a Condition

When you want to edit an existing condition, you first need to search for it. You can also search for a condition group to view the group details without necessarily editing it. To see a list of all condition groups, click **Condition By Group**. All condition groups display in the Condition Administration navigation tree. To see a list of all condition, click **Condition By Name/Number**. All conditions and their group information display in the Condition Administration navigation tree.

To search for a specific Condition

1. Access the Conditions Maintenance portlet ([Navigating to the Setup Portlet](#)).
2. Highlight **Condition By Group** or **Condition By Name/Number** in the Administration portlet.
3. Click **Search** in the Condition Administration portlet.
4. Complete any other fields to narrow your search results. For full details of the available fields refer to [Table 90: New Condition Field Descriptions and Actions](#).
5. Click **Submit**.
Civic Platform displays all the available condition groups or conditions that meet your search criteria in Condition Administration.
6. Click the **Condition Name** of the condition type that you want to modify.
The Condition Name details display in the Condition tab.
7. Make the changes and click **Save**.

Viewing and Editing a Condition

You can view and edit the details of a condition.

To edit a condition

1. Search for the condition you want to edit ([Searching for a Condition](#)).
2. Click the **Condition Name** that you want to modify.
The condition details display in the Condition tab.
3. Update the necessary fields that display.
For an explanation of system-defined condition fields, see [Table 90: New Condition Field Descriptions and Actions](#).
4. Click **Save**.
Civic Platform saves the changes for the condition.

Copying a Condition

Copy a condition to create a new, duplicate condition in the same condition group. When you copy a condition, you create a new condition with the same details, including the condition group setting, as the source condition. You can specify whether to copy the condition assignment options and permission options.

To copy a condition

1. Search for the condition you want to copy ([Searching for a Condition](#)).
2. In the Condition tab, click the **Menu** button and choose **Copy Condition** from the drop-down list. Civic Platform displays the Copy Condition portlet.

The screenshot shows a web-based application interface for managing conditions. At the top, there's a header bar with 'Condition: Zoning Condition', 'Menu', 'Submit', and 'Help' buttons. Below the header is a navigation bar with tabs: 'Condition' (which is selected and highlighted in blue), 'Inspections (0)', 'Permissions (0)', 'Record Types (0)', and 'Workflow (0)'. Underneath the tabs, there's a section labeled 'Condition Name *' with an input field. To the right of the input field are four checkboxes: 'Application Types' (checked), 'Permissions' (checked), 'Workflow' (checked), and 'Inspection' (checked). There's also an option 'All of the Above' which is not checked.

3. Complete this field:

Condition Name Enter a unique name to identify the new condition.

4. Choose the assignment options and permission options (Application Type, Workflow, etc.) you want to copy from the source condition to the new condition. For more information, see [Assigning Conditions](#).
5. Click **Submit**.

Civic Platform displays the new condition in the Condition Detail portlet.

Establishing Condition Types

When a user applies a condition to a component, they must provide the condition group and condition type that the condition belongs to. You must set up the condition groups and condition types in advance, and associate one or more condition types with each condition group.

Topics

- [Adding a Condition Type](#)
- [Searching for a Condition Type](#)
- [Editing a Condition Type](#)
- [Defining Condition Type Permissions](#)

Adding a Condition Type

You can create as many condition types as necessary. A condition type is an attribute or grouping that helps you organize individual conditions. After you create condition types, you must associate them with proper condition groups, so the condition types can display as options in the Condition Type drop-down list after users select a condition group when creating conditions.

To add a condition type

1. Access the Conditions Maintenance portlet ([Accessing the Conditions Maintenance Portlet](#)).
2. Highlight **Condition By Type** in the Administration portlet and right-click and select **New Type**.
3. Enter the new name for the condition type and then click **OK**.
Civic Platform adds the new condition type to the top of the Condition By Type navigation tree.
4. Optionally, specify the **Template** type. This applies only if the condition type supports template fields.
You can create a template field using the application-specific information (ASI) and application-specific information table (ASI Table) fields. For an overview on how to create a condition template, see the topics in the section, [Creating a Condition Template](#).
5. Click **Submit**.
Civic Platform saves the condition type.

Searching for a Condition Type

When you want to edit an existing condition type, you first need to search for it. You can also search for a condition type to view the type details without necessarily editing it.

To see a list of all condition types, click Condition By Type. All condition types display in the Condition Administration navigation tree.

To search for a condition type

1. Access the Conditions Maintenance portlet ([Navigating to the Setup Portlet](#)).
2. Highlight **Condition By Type** in the Administration portlet.
3. Click **Search**.
4. Enter the name of the condition type that you want to search for, select the condition template and then click **Submit**.
Civic Platform returns a list of condition types that match your search criteria.

Editing a Condition Type

You can edit the details about a condition type.

To edit a condition type

1. Access the Conditions Maintenance portlet ([Accessing the Conditions Maintenance Portlet](#)).
2. Locate and select the condition type under the **Condition by Type** tree node.
You can also search for the condition type and then edit the details. See [Searching for a Condition Type](#).
Civic Platform displays the condition type details in the Condition Type tab.
3. Select another template for the condition type and then click **Save**.
Civic Platform saves your changes.

Defining Condition Type Permissions

You can control which user group or user can access standard conditions of a specific condition type by defining permissions for the condition type. The permissions set for a standard condition always override the permissions set for the condition type to which it belongs. User level permissions override user-group

level permissions. For more information about setting permissions for a standard condition, see [Assigning Conditions](#).

To define condition type permissions

1. Access the Conditions Maintenance portlet ([Accessing the Conditions Maintenance Portlet](#)).
2. Locate and select the condition type under the **Condition by Type** tree node.
You can also search for the condition type and open it. See [Searching for a Condition Type](#).
Civic Platform displays the condition type details in the Condition Type tab.
3. Click the **Permissions** tab.
Civic Platform displays the Permissions tab on the Condition Type detail portlet.
4. Click **Assign**.
Civic Platform displays the Assign drop-down menu.
5. Select **Assign Group** or **Assign User**.
6. Navigate through the tree view to select the desired user group or user.
7. Click **Submit**.
Civic Platform lists the user group or user on the Permissions tab and assigns the user group or user full access permission by default.
8. Use the drop-down next to the user group or user to assign Full Access, Read Only, or No Access.
9. Click **Submit**.
Civic Platform saves your changes to the permissions of the selected user group or user.

Creating a Condition Template

The condition templates are in fact Custom Fields groups. The options in the Template field of a condition or a condition type are the Custom Fields that you have configured in your Civic Platform implementation. The steps to prepare condition templates are the same as preparing Custom Fields groups for records. This section describes the key tasks you must perform.

Topics

- [Defining Custom Fields Group Data for Conditions](#)
- [Setting Condition Template Permissions](#)
- [Designing a Layout for the Condition Details Portlet](#)

Defining Custom Fields Group Data for Conditions

When you create a template for a condition, you configure the Custom Fields group first. The Custom Fields group name displays in the Template field when creating a condition or a condition type.



Note:

The template that you specify for a condition overrides the template, if any, that you associated with the condition type of the condition.

To define a Custom Fields subgroup in a Custom Lists group for a condition template, see [Creating Custom Fields](#).

Setting Condition Template Permissions

Either Custom Fields security settings or a customized Custom Fields form layout can block a user or user group from viewing certain Custom Fields and Custom Lists on a condition template.

The permissions set for a standard condition always override the permissions set for the condition type to which it belongs. User level permissions override user-group level permissions. If a user has Custom Fields security or Custom Fields form layout permission at the same time, the strictest access setting applies.

There are various methods to control user and group access to condition template fields.

You can assign permissions based on the user login to restrict access to Custom Fields and Custom Lists data. See [Setting Up Security Policies](#).



Note:

If you do not have access permission to a Custom Fields group, the Custom Fields group can still display as a condition template option. However, when you select the Custom Fields group as the condition template, the template field does not display.

You can set the condition template field permissions in the Custom Fields Form Layout Editor and apply security at the module, group, and user level. See [Designing Application Intake Forms](#).

You can set access within the Condition portlet and layout the design of condition templates. Follow the steps in [Designing a Layout for the Condition Details Portlet](#).

Designing a Layout for the Condition Details Portlet

You can choose which fields you want to show in the Condition Details portlet, and you can customize those fields. You can add a label for the field, specify its width, apply a mask, and indicate sort order and display order. You can also specify how many items to display in an expanded and contracted list.

You must separately design the layout of system-defined condition fields and then design the layout of the condition template fields (Custom Fields and Custom Lists).

- To design the layout of system-defined condition fields, use the edit view feature in the Condition Details portlet. See [Designing Forms for Portlets](#).
- To design the layout of the condition template fields (Custom Fields and Custom Lists), you can create Custom Fields screens for Custom Fields groups. See [Designing Application Intake Forms](#).

If you defined one or more Custom Fields screens for a Custom Fields group, and you select the Custom Fields group as the condition template, all the fields and tables in the Custom Fields group display below the system-defined condition fields, with the layout you designed in the Custom Fields screens.

If you did not define a Custom Fields screen for a Custom Fields group, or you do not have permissions for the Custom Fields screen for the Custom Fields group, after you select the Custom Fields group as the condition template, all the fields and tables in the Custom Fields group display below the system-defined condition fields, with the default layout.

Applying Condition Audit Logs

As an administrator, you can choose to enable the condition audit log functionality in Civic Platform. You can also grant yourself and agency users permission to access the condition audit log.

Viewing and Filtering Condition Audit Logs

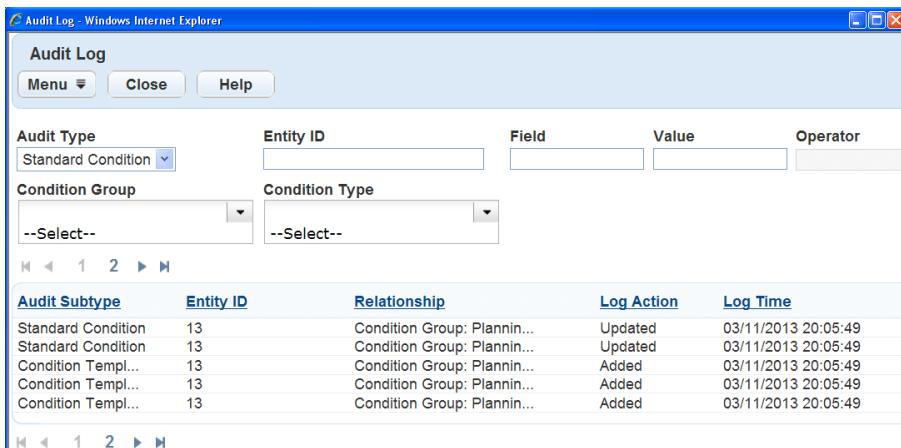
Administrators with access to the audit log can review condition the audit log from the condition list portlet and condition detail portlet. See [Figure 29: Condition Audit Logs in Condition List and Detail Portlet](#).

For instructions on how to access the audit log, see “Viewing Condition Audit Logs” in the Accela Civic Platform User Guide.

Figure 29: Condition Audit Logs in Condition List and Detail Portlet

To view or filter the condition audit logs

1. Access the Conditions Maintenance portlet ([Accessing the Conditions Maintenance Portlet](#)).
2. Click any of the Condition By categories in the navigation tree. For example, click the Condition By Group category.
Civic Platform displays the conditions in the condition list portlet.
3. Complete one of these options:
 - To view audit logs for multiple conditions, click View Log at the top of the condition list portlet.
 - To view audit logs for one condition, click the desired condition from the condition list and then click View Log at the top of the condition detail portlet.
Civic Platform displays the Audit Log for the condition.



- To narrow down the audit log results, enter one or more filter criteria from the filter criteria fields. See [Table 91: Log Detail Filters and Options](#).

- Click Filter.

Table 91: Log Detail Filters and Options

Audit Subtype	Sub types of the Condition audit type. The audit subtypes include Condition Template Form, Condition Template Table, and Record Condition.
Audit Type	The audit type is Standard Condition.
Condition Group	The condition groups for any one of the conditions.
Condition Name	The name of the condition an administrator created or modified.
Condition Type	The condition types for any one of the conditions.
Entity ID	The identification number of a condition.
Field	The field which had its value modified by an administrator.
Log Action	The action completed, such as Delete. You cannot remove this detail from the log.
Log Time	The date and time of the activity. For example, the date and time an administrator updated a condition. You cannot remove this detail from the log.
Operator	The user who completed the action. Here it is the Accela administrator.
Product	The product an administrator was using when they made the modification listed in the log.
Relationship	Displays the source objects associated with the modified field. For example, for a condition template field, it displays Condition Group, Condition Type, Condition Template Subgroup, and Condition Name.
Value	The value of the modified field upon completion of the action.

Assigning Conditions

This section contains details about the administrative strategy to assign conditions for all of these areas. However, the steps to set up and apply conditions to a record type, user group, user, inspection group or inspection type, or workflow process are very similar. For complete details of permission options, see [Figure 30: Assign Options in Condition by Group](#).

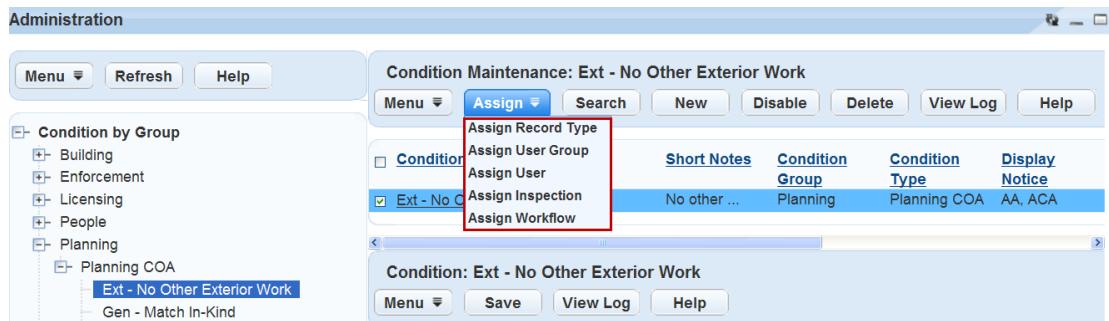


Figure 30: Assign Options in Condition by Group

The steps for all of these groups or areas are the steps under this step heading [Assigning a Condition to a Workflow Process](#). First, you must create the condition, then locate the application type for which you want to provide a standard condition. Select the condition(s) from a list and save them to that application type. When a user accesses a record they might see the standard condition message. They can click the condition link to view or modify the details for that condition as it applies to that record.

Topics

- [Assigning Conditions to a Record Type](#)
- [Assigning a Condition to a User Group](#)
- [Assigning a Condition to an Inspection Group](#)
- [Assigning a Condition to a Workflow Process](#)

Assigning Conditions to a Record Type

You can assign conditions to a record type. When a user creates a new record, the conditions you assign to the selected Record Type copy to the new application and the Condition Status becomes “Applied.”

For full details refer to: [To assign conditions to a record type, user group, inspection group, or workflow](#).

The conditions assigned to the record type copy over regardless of the user group permissions. The user group security only determines if the condition displays in the list portlet and if the user can edit or just view the condition details. This happens after a user clicks Submit on a New Application.

For example, when applying for a building permit for a new development a drainage study must occur prior to the approval of the permit. This is a standard condition you apply to the Building Permit application.

You can create a standard condition and name it D01 Drainage Study and associate it with the Building/Building Permit/Drainage/Grading record Type. When the user creates a new application with the Building/Building Permit/Drainage/Grading record type, the D01 Drainage Study condition copies over to the New Application record.

Assigning a Condition to a User Group

You can also assign a specific set of conditions to a user group, such as the Building department, whose users have access to only those conditions that are appropriate for their department's functions.

For full details refer to: [To assign conditions to a record type, user group, inspection group, or workflow](#).

Assigning a Condition to an Inspection Group

Much like assigning a condition to a record type, you can also assign a set of unique conditions to a specific inspection group or inspection type. The conditions assigned to the Inspection Type or Group automatically copy over regardless of the user group permissions.

Inspectors for each inspection type automatically have a list of conditions available as they process their inspections. While the inspector follows the inspection flow process (an outline of all the inspections that a user group must complete between the time that an application is submitted until its issuance) they have the appropriate access to process any conditions for their inspections.

For full details refer to: [To assign conditions to a record type, user group, inspection group, or workflow](#).

Assigning a Condition to a Workflow Process

Workflow process validation is another aspect of conditions where you can extend the conditions that currently exist for an application to inhibit the workflow process related to that application. Process validation lets you determine the validity of the workflow process based on the condition of the application it belongs to. When an application becomes locked, the workflow process becomes invalid and cannot go forward.

For full details refer to: [To assign conditions to a record type, user group, inspection group, or workflow](#).

Depending on the status of certain tasks within the workflow, you set up Civic Platform to check the current condition of the application and inhibit the workflow accordingly. For example, you can lock the workflow process in the event that an occupancy certificate becomes denied and the application becomes locked.



Note:

If you want to change the workflow process or require that individual tasks reach a certain status, you can make these changes when you set up the workflow.

You can add process validations, or checkpoints, where you want Civic Platform to check the current condition of the application and expand those conditions to control the workflow process. For example, after the workflow reaches the Final phase, you can check to see if the application became locked, on hold, or has any notices associated with it. You can then determine if you need to stop or adjust the workflow process.

After you add a process validation, you might need to change the task or task status that you originally chose to base the validation on. You can also change the application conditions that you want the validation to check.

To assign conditions to a record type, user group, inspection group, or workflow

1. Access the Conditions Maintenance portlet ([Accessing the Conditions Maintenance Portlet](#)).
2. Use the main Administration navigation tree to locate the condition you need. You can locate a condition by **Group**, **Condition Type**, **Name/Number**, **Application Type**, **Inspection**, **User Group**, or **User**. If you cannot locate the condition name you want to apply, you can search for it. Refer to [Assigning Conditions](#).
 - Highlight the condition you want to apply. Note the following tips:
Click the plus sign (+) that appears to the left of the name to expand a list.
To include all the names within a list, select that name. To include only one name in the list, select only that name and not the entire list
3. Select the Condition Name in the Condition Administration list.

4. Click **Assign**.

Civic Platform displays the Condition Administration, which lists conditions

5. Complete one of these options:

- To assign the condition to a record type, click **Assign** and choose **Assign Record Type**.

Civic Platform displays the a navigation tree of the Record Types within your agency

1. Highlight the Record Types to which you want to apply a condition. Note the following tips:

2. Click the plus sign (+) that appears to the left of the name to expand a list.

To include all the names within a list, select that name.

To include only one Record Type in the list, select only that Record Type alias and not the entire list.

3. Click **Submit**.

Civic Platform saves and adds the condition to the Record Type you selected.

4. If you need to further modify the Condition you applied to the Record Type refer to [Searching for a Condition](#) to use the Condition detail portlet.

- To assign the condition to a User Group, which might be a department, click **Assign** and choose **Assign User Group**.

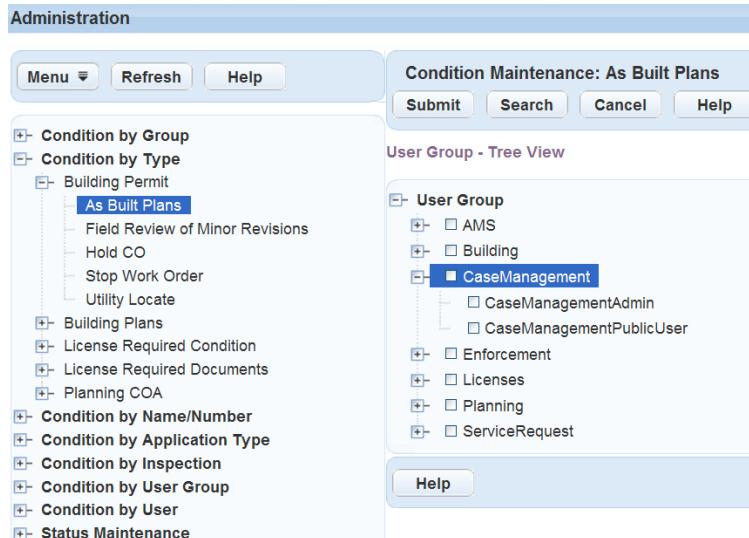
Civic Platform displays a User Group navigation tree of the user groups within your agency.

- Highlight the User Group to which you want to apply a condition. Note the following tips:

Click the plus sign (+) that appears to the left of the name to expand a list.

To include all the names within a list, select that name.

To include only one User Group name in the list, select only that User Group name and not the entire list.



- Click **Submit**.

Civic Platform saves and adds the condition to the User Group you selected previously.

- If you need to further modify the Condition you applied to the User Group, refer to [Searching for a Condition](#) to use the Condition detail portlet.

- To assign the condition to an Inspection Group or Inspection Type, click **Assign** and choose **Assign Inspection**.

Civic Platform displays the Inspection Group/Type navigation tree of the inspection types within your agency.

- To include only one Inspection Type name in the list, select only that Inspection name and not the entire list.

Condition Maintenance: As Built Plans

Submit Search Cancel Help

Select an inspection Group/Type

- BLD Commercial
- BLD Demolition
- BLD Electrical Comm
- BLD Electrical Res
- BLD Mechanical Comm
- BLD Mechanical Res**
 - Ground Work
 - Rough In
 - Duct Work
 - Gas Meter Reset
 - Gas Service
 - Construction Gas
 - Relocate Service
 - Service Interior
 - Mechanical Final
 - Progress Check

2. Click Submit.

Civic Platform saves and adds the condition to the Inspection Group/Type you selected previously.

3. If you need to further modify the Condition you applied to the Inspection Group/Type, refer to [Searching for a Condition](#) to use the Condition detail portlet.

- To assign the condition to a Workflow process, click **Assign** and choose **Assign Workflow**.

Civic Platform displays the a navigation tree of the Workflow Process/Task/Status within your agency.

- Highlight the Workflow Process or Workflow Task to which you want to apply a condition. Note the following tips:

2. Click the plus sign (+) that appears to the left of the name to expand a list.

To include all the names within a list, select that name.

To include only one Workflow Process/Task in the list, select only that Workflow name and not the entire list.

Condition Maintenance: Sunny's condition

Submit Search Cancel Help

Select a Workflow Process\Task>Status

- B
 - B_COMBO_ALT_COM
 - B_COMBO_COMPL_C
 - B_COMBO_DEMO
 - B_COMBO_MISC_RES
 - B_COMBO_POOL_C
 - B_COMBO_REROOF
 - B_COMBO_SIGN_C
 - B_EXEMPT_CERT
 - B_MOVED_BLDG_COM
 - B_SIC
- S

Help

3. Click Submit.

Civic Platform saves and adds the condition to the Workflow Process you selected previously

- If you need to further modify the Condition you applied to the Workflow Process/Status/Type refer to [Searching for a Condition](#) to use the Condition detail portlet.

Maintaining Condition Statuses

You can manage the status options for general conditions and conditions of approval separately.

Topics

- [Adding a Condition Status](#)
- [Editing and Deleting a Condition Status](#)

Adding a Condition Status

You can set up custom condition statuses for conditions of approval to outline the condition phases. For example, for any conditions that become obsolete, you can set up an “expired” phase. Users can choose to apply any of these custom statuses when a user applies a general condition to a component.

To add a condition status

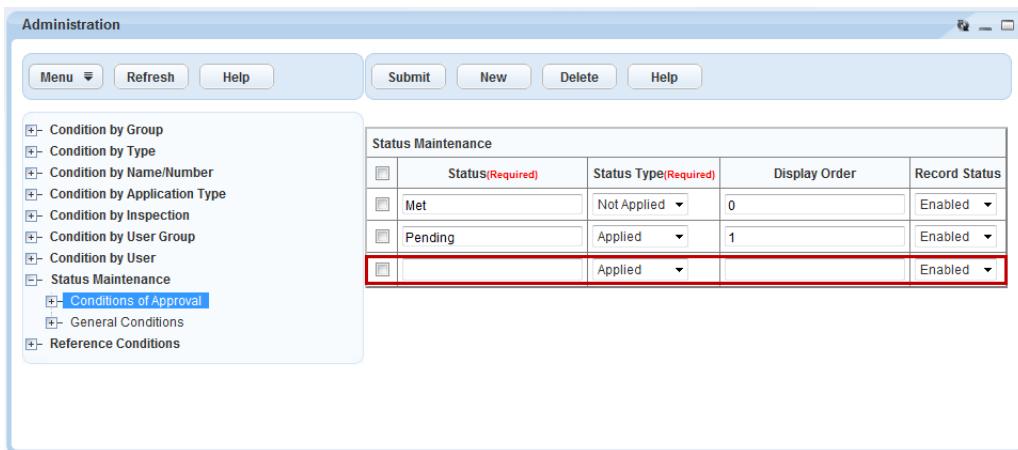
- Access the Conditions Maintenance portlet ([Navigating to the Setup Portlet](#)).
- Click **Status Maintenance** from the Condition navigation tree and then click **Conditions of Approval** or **General Conditions**.

Civic Platform displays the Status Maintenance portlet for conditions of approval.

Status (Required)	Status Type (Required)	Display Order	Record Status
Met	Not Applied	0	Enabled
Pending	Applied	1	Enabled

- Click **New**.

Civic Platform adds a new row to the Status Maintenance table.



4. Complete the following fields.

Status	Enter a descriptive name for the status.
Status Type	Select the Status Type from the drop-down list. Applied indicates that general conditions are applied to the record, inspection, address, parcel, owner, licensed professional, structure, establishment, asset, or contact. Or it indicates that conditions of approval are applied to the record, inspection, or record set. For example, if the Address has the condition severity level of Hold then the Address retains this condition until it meets or resolves the condition. Not Applied removes the conditions restrictions on the record, inspection, or the component. For example, if the Parcel condition meets or resolves the severity level of Notice then the Parcel can continue with normal processing.
	Note:
	Status Type is not configurable in Classic Administration. If you create a status in Classic Administration or via EMSE without defining its status type, Civic Platform automatically assigns an “Applied” status type to the Applied status named, and a “Not Applied” status type to other statuses.
	If you configure the Standard Choice <code>ENABLE_CONDITION_RESOLVED_DATE</code> , when users save Applied conditions (including conditions of approval), users save them without a status date. Status date is only saved when a condition (or condition of approval) is met.
Display Order	Enter the numeric value for the display order of the field as it displays to users as a condition status drop-down list. If you do not indicate a display order, it defaults to alphabetical order.
Record Status	Select Enabled or Disabled from the drop-down list. Enabled turns on the status item, making it available for users to select in the condition status drop-down list.

5. Click Submit.

Editing and Deleting a Condition Status

After you add a condition status, you might need to change the status name or description. You can also enable any status that has a “disabled” status or vice versa. To delete a condition status, select the status name and click **Delete**.

To edit a condition status

- Access the Conditions Maintenance portlet ([Navigating to the Setup Portlet](#)).

2. Click **Status Maintenance** from the Condition navigation tree and then click **Conditions of Approval** or **General Conditions**.

Civic Platform displays the Status Maintenance portlet for conditions of approval.

Status	Status Type	Display Order	Record Status
Met	Not Applied	0	Enabled
Pending	Applied	1	Enabled

3. Do any of the following:

- To edit a condition status, edit the fields as necessary and click **Submit**.
- To delete a condition status, select the status name and click **Delete**.

Configuring Reference Conditions

Configuring How Reference Conditions are Updated

Civic Platform organizes conditions in groups called Condition Types. You can configure the behavior of how Civic Platform updates reference conditions in the Reference Condition portlet.

Configure how to update the reference conditions as applicable to your agency. You can configure Civic Platform to update all associated records when you sign off on a reference condition for any record with or without a prompt. You can configure to update the reference condition by signing it off at the record level without impacting the main parcel condition or any other associated records.

Any time you unlock or override a reference condition status from the record condition notice portlet or Condition tab, Civic Platform records this action. This results in correct behavior for each record.

To assign a condition type with update reference condition behavior

1. Access the Conditions Maintenance portlet ([Accessing the Conditions Maintenance Portlet](#)).
2. Select **Reference Conditions** from the Condition navigational tree.

Civic Platform displays the Reference Conditions portlet.

The screenshot shows the 'Administration' window with the title bar 'Administration'. Below the title bar are buttons for 'Menu', 'Refresh', 'Help', 'Submit', 'New', 'Delete', and 'Help'. On the left, there is a sidebar with a tree view containing nodes like 'Condition by Group', 'Condition by Type', etc., with 'Reference Conditions' selected. The main area is titled 'Reference Conditions' and contains a table with the following data:

	Condition Type*	Update Reference Conditions for all Records*	Record Status*
<input type="checkbox"/>	Activities	Yes - Prompt	Enabled
<input type="checkbox"/>	Building	No	Enabled
<input type="checkbox"/>	Code	No	Enabled
<input type="checkbox"/>	Land	Yes - No Prompt	Enabled
<input type="checkbox"/>	Parcel	Yes - Prompt	Enabled
<input type="checkbox"/>	People	No	Enabled
<input type="checkbox"/>	Special	Yes - Prompt	Enabled

3. Click **New.**

4. Complete the following fields.

Condition Type	Select the Condition Type from the drop-down list.
Update Reference Conditions for all Records.	Select an option from the drop-down list. Yes - No Prompt If you update a reference condition on a record, it affects all associated records with that reference condition without a prompt. No - If you update a reference condition on a record, Civic Platform overrides the reference on the individual record only. This does not affect the other records with the reference condition. Yes - Prompt - When selected, Civic Platform displays, "Would you like to update Reference Conditions for all Records?" If you choose Yes, Civic Platform updates the main reference condition and all of its related records.
Record Status	Select to enable or disable the feature from the drop-down list.

5. Click **Submit.**

6. To delete a Condition Type, select the Condition Type and click **Delete.**

Configuring Record-Related Activities

You can create and manage activities that are unique to your agency. When you configure activities as described in this section, users can assign activities, such as a follow-up inspections or phone-calls, to other agency staff members.

Click a topic title below for full details.

Related Information

[Working with Activity-Specific Information Group Codes](#)

[Working with Activity-Specific Information Subgroups](#)

[Working with Activity Types](#)

Working with Activity-Specific Information Group Codes

Topics

- [Creating or Editing an Activity-Specific Information Group Code](#)
- [Searching for an Activity-Specific Information Group Code](#)
- [Deleting an Activity-Specific Information Group Code](#)

Creating or Editing an Activity-Specific Information Group Code

Before Civic Platform users can work with activity-specific information, administrators need to create group codes for the information. Each activity-specific information group code can include many activity-specific information subgroups. Administrators can also edit activity-specific information group codes, as needed.

You can identify fields as any of the following basic types:

- Number Field. Lets users enter only numeric characters in a number field. A number field displays the word “number” to the right of the field.
- Text Field. Lets users enter only text characters in a text field. A text field displays the word “text” to the right of the field.
- Text Area. Lets users enter multiple lines of text, such as a three-line address.
- Date Button. Lets users search for a date rather than entering a date manually.
- Yes/No Radio Buttons. Lets users select either a Yes or No value.
- Drop-down List. Lets users choose a value from a list of predefined values determined by your agency.
- Time. Lets users enter a time value.
- Money. Lets users enter a dollar amount.
- Check box. Lets users click to select the option.

Creating a group code is the first step in the process for working with activity-specific information.

To create or edit an activity-specific information group code

1. Access the Activity Specific Info portlet ([Accessing the Activity Specific Info Portlet](#)).
 2. Do one of the following:
 - Click the activity-specific information group code you want to view.
 - Search for the activity-specific information group code you want to view. For instructions, see [Searching for an Activity-Specific Information Group Code](#).
 - Click **New** to create a new activity-specific information group code.
- Civic Platform displays the Activity Specific Info Group Code detail portlet.

Activity Specific Info Group Code:		
Activity Specific Info Group Code*	Activity Specific Info Subgroup*	Group Display Order
<input type="text"/>	<input type="text"/>	<input type="text"/>
Field Label*	Field Type*	Display Order*
<input type="text"/>	Text	<input type="text"/>
Default Value	Unit --Select--	Required Flag
<input type="text"/>	No	No
Fee Indicator	Searchable Flag	Max Len
<input type="text"/>	No	<input type="text"/>
Display Len	Status	<input type="checkbox"/>
<input type="text"/>	Enabled	<input type="button" value=""/>

3. Complete the Activity Specific Info Group Code fields that display. For a list of field descriptions, see [Table 92: Activity Specific Info Group Code Fields](#).
 4. Click **Submit**.
- Civic Platform displays a confirmation message.

Table 92: Activity Specific Info Group Code Fields

Activity Specific Info Group Code	Enter the name of the activity specific group.
Activity Specific Info Subgroup	Enter the name of the activity specific subgroup. The subgroup identifies the specific type of information that the agency wants to associate with the activity.
Display Len	Specify the maximum number of characters that the activity-specific information can display.
Display Order	Enter a number to determine the position of the subgroup field for the group code. For example, to have the Date subgroup field display before the Reply By subgroup field, enter "10" for the Date subgroup field and "20" for the Reply By subgroup field.
Default Value	Enter the desired default value for the activity-specific information group code.
Fee Indicator	Enter a unique 5-digit indicator to identify this application-specific variable in the fee formula. You must use a value between 10100 and 10599 and use the following format: \$fixxxx\$. This field is optional. For example, enter \$fi10101\$
Field Label	Enter a label for the subgroup field.
Field Type	Choose the type of field in your activity specific group.
Group Display Order	Enter a number to determine the position of the activity-specific information group. For example, enter "10" to display the Phone Call group code first and "20" to display the Email group code second.
Max Len	Specify the maximum number of characters that the field accepts.
Required Flag	To require users to enter a value in this field, choose Yes ; otherwise, choose No .

Searchable Flag	To allow users to search for the activity-specific information, choose Yes ; otherwise, choose No .
Status	To allow users to use the activity-specific information field, click Enabled; otherwise, click Disabled.
Unit	Enter any unit definition that you want to attach to the field value. For example, enter "square feet," "dollars," or "miles."
Use Shared Drop-down Lists	Select this option to associate shared drop-down lists with an activity-specific information group code. When you select this option, a search field enables you to search for existing shared drop-down lists. If you search for a shared drop-down list that does not match any existing shared drop-down lists, then the Shared Drop-down List Search page opens. Use this page to search for existing shared drop-down lists. If you search for a shared drop-down list that matches one existing shared drop-down list, then the existing shared drop-down list displays in the Activity Specific Info Group Code detail portlet. If you search for a shared drop-down list that matches multiple existing shared drop-down lists, then the Shared Drop-down List Select page opens and you can select the desired drop-down list.

Searching for an Activity-Specific Information Group Code

This section describes how to locate the activity-specific information group codes in your Civic Platform system. After you locate a group code, you can view it or edit it. For instructions on editing, see [Creating or Editing an Activity-Specific Information Group Code](#).

To search for an activity-specific information group code

1. Access the Activity Specific Info portlet ([Navigating to the Setup Portlet](#)).

2. Click **Search**.

Civic Platform displays the Activity Specific Info Group Code search portlet

3. Complete any of the following fields.

Activity Specific Info Group Code Enter the activity specific info group code you want to find.

Activity Specific Info Subgroup Enter the name of the activity specific info subgroup you want to find.

4. Click **Submit**.

Civic Platform displays the search results.

Deleting an Activity-Specific Information Group Code

You can delete a group code that has attached subgroups.



Note:

If you delete all associated subgroups, Civic Platform deletes the group code automatically. For more information, see [Deleting a Subgroup from an Activity-Specific Information Group](#).

To delete an activity-specific information group code

1. Access the Activity Specific Info portlet ([Accessing the Activity Specific Info Portlet](#)).
 2. Select the activity specific info group code that you want to delete.
 3. Click **Delete**.
- Civic Platform displays a confirmation message.

Working with Activity-Specific Information Subgroups

Subgroups are the activity-specific information data elements that an agency defines and associates with an activity. Administrators define subgroups as needed. An agency can use subgroups with multiple group codes. You can copy subgroups from one group code to another as needed.

Topics

- [Creating a New Subgroup for Activity-Specific Information](#)
- [Adding Existing Subgroups to Activity-Specific Info Group Codes](#)
- [Deleting a Subgroup from an Activity-Specific Information Group](#)

Creating a New Subgroup for Activity-Specific Information

Subgroups are the activity-specific information data elements that an agency defines and associates with an activity. You can define and associate as many subgroups as you need to an activity-defined group code.

To create a new subgroup for activity-specific information

1. Access the Activity Specific Info portlet ([Accessing the Activity Specific Info Portlet](#)).
 2. Click the activity-specific information group code for which you want to create a subgroup.
 3. Click **New**.
- Civic Platform displays the Activity Specific Info Group Code Subgroup portlet.

Activity Specific Info Group Code: Letter		
Menu	Submit	Reset
Activity Specific Info Group Code: Activity Specific Info Subgroup: Group Display Order		
Letter	Field Type*	Display Order*
Field Label*	Text	
Default Value	Unit	Required Flag
--Select--	No	No
Fee Indicator	Searchable Flag	Max Len
No	No	
Display Len	Status	<input type="checkbox"/>
	Enabled	<input type="button" value="Search"/>

4. Complete the Activity Specific Info Group Code fields that display. For a list of field descriptions, see [Table 92: Activity Specific Info Group Code Fields](#). If you are adding a drop-down list field, you must set the values that you want to include in the list of the field. See [Setting Drop-down List Field Values](#).
 5. Click **Submit**.
- Civic Platform displays a confirmation message.

Adding Existing Subgroups to Activity-Specific Info Group Codes

Agencies can copy a subgroup and use it with multiple group codes. You must associate a subgroup with at least one group code before you can copy it.

Some subgroups that you can copy are Date, Reply By, From, and To. You can use all of these subgroups with group code types such as Phone Call, Email, and Letter.

To add an existing subgroup to an activity-specific information group code

1. Access the Activity Specific Info portlet ([Accessing the Activity Specific Info Portlet](#)).
2. Click the group code to which you want to copy existing subgroups.

Civic Platform displays the Activity Specific Info Subgroup list portlet.

Activity Specific Info Subgroup	
<input checked="" type="checkbox"/> two	1
<input type="checkbox"/> new one	2

3. Click **Look Up** to locate the subgroup you want to copy.

Civic Platform displays the Activity Specific Info Subgroup detail portlet.

Activity Specific Info Group Code	Activity Specific Info Subgroup
Email	

4. Complete any of the following fields.

Activity Specific Info Group Code	Enter the activity-specific information group code from which you want to copy the subgroups.
Activity Specific Info Subgroup	Enter the name of the activity specific info subgroup you want to copy to the group code.

5. Click **Submit**.

6. Civic Platform displays the search results.

7. Select the subgroups you want to add to the group code.

8. Click **Select**.

Civic Platform copies the subgroups to the group code, and then displays the results in the list portlet.

Setting Drop-down List Field Values

If you add a drop-down list field to an activity-specific information subgroup, you must then set the values that you want to include in the list of the field.

To add drop-down list values to a drop-down list field

1. Access the Activity Specific Info portlet ([Accessing the Activity Specific Info Portlet](#)).
2. Click the group code and then the subgroup which contains the drop-down list field.

Civic Platform displays the field list of the subgroup.

Activity Specific Info Group Code: PHONE CALL

Menu Submit New Delete Cancel Help

Activity-Specific Info DefaultSubgroup: FOLLOW-UP Apply Change To All Subgroup(s): No

Default Field Label	Field Label	Field Type	Display Order	Default Value
<input type="checkbox"/> Follow-up Status	Follow-up Status	Drop-down List	5	

3. Click the link for the drop-down list field you want to work with.

Civic Platform displays the field detail portlet.

Activity Specific Info Drop-down List

Apply Change To All Subgroup(s): No

Activity Specific Info Group Code*	FOLLOW-UP STATUS	Group Display Order
PHONE CALL	Field Type*	4
Field Label*	Drop-down List	Display Order*
Follow-up Status	Unit	5
Default Value	-Select--	Required Flag
	No	No
Fee Indicator	Searchable Flag	Max Len
	No	
Display Len	Status	<input type="checkbox"/> Use Shared Drop-down List
	Enabled	

4. You can either specify a shared drop-down list, or add the values manually:

- To specify a shared drop-down list, select **Use Shared Drop-down Lists**, and follow the instructions in [Table 92: Activity Specific Info Group Code Fields](#).
- To add the values manually:
 - Click the **Drop-down List** tab.

Civic Platform displays the drop-down list detail portlet.

 - Click the **New** button to add values.
 - If you want to remove a value, select the value and click the **Delete** button.

Civic Platform displays a confirmation message.

Deleting a Subgroup from an Activity-Specific Information Group

If a subgroup is no longer necessary, you can delete it.



Note:

If you delete all associated subgroups, Civic Platform deletes the group code automatically.

To delete a subgroup from an activity-specific information group

- Access the Activity Specific Info portlet ([Accessing the Activity Specific Info Portlet](#)).
- Select the activity-specific information subgroup code that you want to delete.

Activity Specific Info Display Order Subgroup	
<input checked="" type="checkbox"/> two	1
<input type="checkbox"/> new one	2

3. Click Delete.

Civic Platform displays a confirmation message indicating.

Working with Activity Types

After you define an activity-specific information group, and you add activity-specific information subgroups to the group, you can create one or more activity types to associate with the activity-specific information group. You can then specify in which portlet users can create activities with the new activity type. When users create or modify an activity, they can enter activity-specific information related to the activity, based on the activity type and the activity specific info group.

For example, you could associate a phone call activity type with a licensed professional. When a user sees the phone call activity type, they know to call the associated licensed professional and add the information exchanged during the phone call into the activity-specific information fields.

Topics

- [Creating or Updating an Activity Type](#)
- [Searching for an Activity Type](#)
- [Viewing an Activity Type](#)
- [Deleting an Activity Type](#)

Creating or Updating an Activity Type

The Activity Type administration portlet defines the activity types that users can specify when creating activities in records or reference objects. You can associate an activity type with an activity-specific information group that defines the fields applicable to the activity creation of the type.

There are 6 portlets that support activities. Each activity type only works for one and only one of these portlets:

Licensed Professional Portlet

Record Portlet

Reference Address Portlet

Reference Contact Portlet

Reference Owner Portlet

Reference Parcel Portlet

To create or update an activity type

1. Access the Activity Type portlet ([Navigating to the Setup Portlet](#)).

2. Do one of the following:

- Click **New** to create a new activity.
- Click the activity you want to update.

Civic Platform displays an Activity detail form portlet.

The screenshot shows a web-based configuration interface. At the top, there are four buttons: 'Menu' with a dropdown arrow, 'Submit', 'Reset', and 'Help'. Below these are two input fields: 'Activity Type *' (containing a placeholder) and 'Activity Specific Info Group Code' (with a dropdown menu showing 'Select'). To the right is a large text area labeled 'Description' with a scroll bar. At the bottom right of the text area is a link 'check spelling'.

3. Complete the necessary fields as described in [Table 93: Activity Type Fields](#).
4. Click **Submit** to save the changes.

Civic Platform displays a confirmation message.

Table 93: Activity Type Fields

Activity Type	Enter the name of the activity.
Activity Specific Info Group Code	Select the activity-specific information group code from the drop-down list.
Description	Enter a short summary of the action taken related to the activity.
Reference Type	Select to which portlet (business object) to apply the current activity type definition.
Active	Select Enable if you want to display the activity to users; otherwise, select Disable .

Searching for an Activity Type

To search for an activity type

1. Access the Activity Type portlet ([Navigating to the Setup Portlet](#)).
2. Click **Search**.
Civic Platform displays the Activity Type search form portlet.
3. Complete the necessary fields as described in [Table 93: Activity Type Fields](#).
4. Click **Submit**.
Civic Platform returns a list of activity types that match the search criteria.

Viewing an Activity Type

To view an activity type

1. Access the Activity Type portlet ([Navigating to the Setup Portlet](#)).
2. Click the activity that you want to view.
Civic Platform displays the Activity Type detail form portlet.

Deleting an Activity Type

You can delete any activity that you no longer need.

To delete an activity type

1. Access the Activity Type portlet ([Navigating to the Setup Portlet](#)).
2. Select the activity you want to delete.
3. Click **Submit**.

Civic Platform displays a confirmation message.

Configuring Standard Comments

Standard comments are pre-defined comments that users can quickly select in lieu of the time-consuming task of manually entering comments that they use repeatedly. Standard comments help users complete tasks quickly and improve the consistency of the information on your system.

Standard comments exist throughout Civic Platform. Specifically, users can add standard comments when updating workflow tasks, entering inspection results, and placing any type of condition on an object.

System administrators must configure Comment Groups, then add Comment Types to those groups, and then create Comments for those types. You can assign each Standard Comment Group, with its associated types and comments, to record types, inspections, workflows, and checklists. You can create a Comment Group and assign it, then add Comment Types and Comments later; until you add Types and Comments, the data picker on the user side is empty. You can also create a Comment Group, then add Types and Comments to it, and then assign the group.

Click a topic title below for full details.

Related Information

[Managing Standard Comment Groups](#)

[Managing Standard Comment Types](#)

[Managing Standard Comments](#)

[Enforcement Violation Comments](#)

Managing Standard Comment Groups

The first step in managing comments is to create a comment group. The only information you need to create a group is a comment group name.

There are two ways of assigning a comment group. You can use the Assign button in the Comment Group main portlet or the tabs in the record portlet.

Topics

- [Creating a Comment Group](#)
- [Viewing a Comment Group](#)
- [Searching for a Comment Group](#)
- [Deleting a Comment Group](#)
- [Assigning a Comment Group](#)
- [Managing Associated Record Types](#)
- [Managing Associated Inspections](#)
- [Managing Associated Workflow Tasks](#)
- [Managing Associated Checklists](#)

Creating a Comment Group

The only information you need to create a comment group is a comment group name. You can add comment types and comments to the group later. When you assign a Comment Group to a record type,

inspection, workflow, or checklist, users can choose from the comments associated to the comment group to populate their form.

To create a comment group

1. Access the Comment Group Maintenance portlet ([Accessing the Comment Group Maintenance Portlet](#)).
2. Click **New**.

Civic Platform displays the Create Comment Group page.

The screenshot shows a 'Comment Group Maintenance' interface. At the top, there's a toolbar with 'Menu', 'Assign', 'Search', 'New', 'Delete', and 'Help' buttons. Below the toolbar is a navigation bar with arrows for navigating through pages. A list of comment groups is displayed in a table-like structure. The first row contains a checkbox and the text 'Comment Group'. The second row, which is highlighted in blue, contains a checkbox and the text 'Licensing Department'. The third row contains a checkbox and the text 'Health Department'. Below the list is another set of buttons: 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. At the bottom of the page is a text input field with the placeholder 'Comment Group *'.

3. Enter a name in the **Comment Group** field.
4. Click Submit.

Civic Platform adds the new group to the Comment Group List.

The screenshot shows a 'Comment Group: Structure Department' interface. At the top, there's a toolbar with 'Menu', 'New', 'Look Up', 'Delete', and 'Help' buttons. Below the toolbar is a navigation bar with links for 'Comment Type (0)', 'Record Types (0)', 'Inspections (0)', 'Workflow (0)', and 'Guide Sheet (0)'. A red message 'Comment Group saved successfully.' is displayed. Below the message is a table with two rows. The first row has a checkbox and the text 'Comment Type'. The second row has a checkbox and the text 'Comment Group'. Both rows have a link '0 record(s) found.'

Viewing a Comment Group

To view a comment group

1. Access the Comment Group Maintenance portlet ([Accessing the Comment Group Maintenance Portlet](#)).
2. Click the name of the comment group you want to view.

Civic Platform displays the associated Comment Types and Comments.

The screenshot shows the 'Comment Group Maintenance' portlet. At the top, there are buttons for 'Menu', 'Assign', 'Search', 'New', 'Delete', and 'Help'. Below this is a navigation bar with arrows and page numbers 1 and 2. A list of comment groups is displayed in a table format:

<input type="checkbox"/> Comment Group
<input type="checkbox"/> Planning Department
<input checked="" type="checkbox"/> Licensing Department
<input type="checkbox"/> Health Department

Below this is another navigation bar with arrows and page numbers 1 and 2. A detailed view for 'Licensing Department' is shown in a separate window:

Comment Group: Licensing Department

Navigation buttons: Menu, New, Look Up, Delete, Help.

Links: Comment Type (1), Record Types (1), Inspections (0), Workflow (7), Guide Sheet (0).

Table showing details for 'Licensing Department':

<input type="checkbox"/> Comment Type	Comment Group
<input type="checkbox"/> REVIEW	Licensing Department

Searching for a Comment Group

Search for existing standard comment groups.

To find a comment group

1. Access the Comment Group Maintenance portlet ([Accessing the Comment Group Maintenance Portlet](#)).
2. Click **Search**.

Civic Platform displays the Standard Comment Group Search portlet.

The screenshot shows the 'Comment Group Maintenance' search interface. At the top, there are buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. The search fields are organized into three columns:

Comment Group	Comment Type	Comment ID
Comment Name	Record Type	Guide Sheet Group
Guide Sheet	Guide Sheet Item	Inspection Group Name
Inspection Type	Workflow Process	Workflow Task

3. Complete any fields that display. For a description of the fields, see [Table 94: Standard Comment Group Search Fields](#).

4. Click **Submit**.

Civic Platform returns a list of Standard Comment Groups that meet your search criteria.

Table 94: Standard Comment Group Search Fields

Comment Group	Enter the name of the comment group.
Comment Type	Enter the name of the comment type.
Comment ID	Enter the comment ID.
Comment Name	Enter the comment name.
Permit Type	Enter the name of permit type for the comment group you are searching for. Click the data picker icon next to this field to choose the Permit Type from a data navigation tree.

Checklist Group	Enter the name of the checklist group for the comment group you are searching for.
Checklist	Enter the name of the checklist for the comment group you are searching for.
Checklist Item	Enter the name of the checklist item for the comment group you are searching for.
Inspection Group Code	Enter the inspection group code for the comment group you are searching for.
Inspection Type	Enter the name of the inspection type for the comment group you are searching for.
Workflow Process	Enter the name of the workflow process for the comment group you are searching for.
Workflow Task	Enter the name of the workflow task for the comment group you are searching for.

Deleting a Comment Group

You cannot delete a comment group if you assign it to a record type, inspection, workflow, or checklist. You must first delete the relationship between the comment group and the type and then delete the comment group.

To delete a comment group

1. Access the Comment Group Maintenance portlet ([Accessing the Comment Group Maintenance Portlet](#)).
2. Delete any comment types associated to the comment group. For instructions, see [Deleting a Comment Type](#).
3. In the **Standard Comments** portlet, select the Comment Group you want to delete.
4. Click **Delete**.

Civic Platform deletes the Comment Group.

Assigning a Comment Group

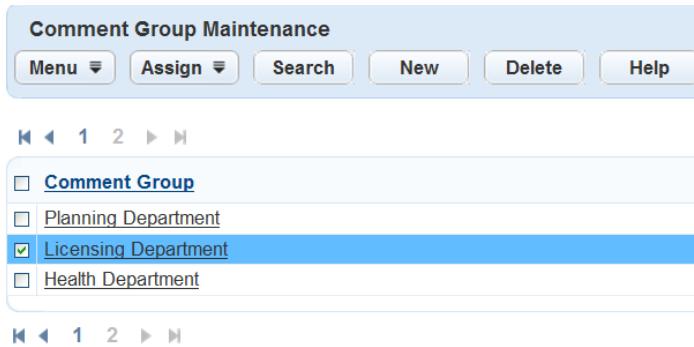
When you assign a comment group to a record type, inspection, workflow, or checklist, you provide users with a drop-down list of the comments contained in the comment group. When working in the form, users can choose a standard comment from the drop-down list to populate the Comments field.

There are two ways of assigning a comment group. You can use the Assign button in the Comment Group main portlet or the tabs in the record portlet. Both paths display a navigation tree with all the record types, inspection types, workflows, and checklists you can assign to a comment group. Select one or more types and assign the comment group. Each comment type and comment belonging to the comment group is now available for users to select when completing forms associated with the record, inspection, workflow, or checklist type.

You can assign each comment group to multiple types. However, each record type, inspection type, workflow, and checklist can only have one comment group assigned to it. When you try to assign a comment group to a type that already has one, Civic Platform displays an error message.

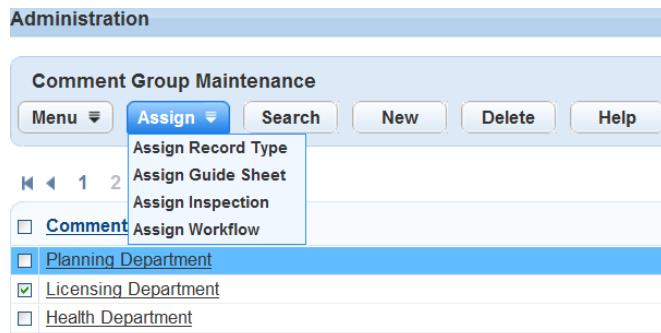
To assign a comment group

1. Access the Comment Group Maintenance portlet ([Accessing the Comment Group Maintenance Portlet](#)).
2. Use one of two methods to select the record type, inspection, workflow, or checklist to which you want to assign the comment group:
 - a. Mark the check box beside the comment group you want to assign.



- Hover over or click Assign.

The Comment Group Assign menu displays under the Assign button.



- Click one of these four choices:

Assign Record Type
Assign Checklist
Assign Inspection
Assign Workflow

Civic Platform displays a navigation tree with the record types, checklists, inspections, or workflows.



- Click the name of the comment group you want to assign.

Civic Platform displays the Comment Types and Comments that belong to the selected Comment Group.

- Click one of the following tabs, depending on which type of form you want to assign to the comment group:

Record Types
Inspections
Workflow
Checklist

Civic Platform displays the list of record types, inspections, workflows, or checklists assigned to the comment group.

The screenshot shows the 'Comment Group Maintenance' screen. At the top, there's a toolbar with 'Menu', 'Assign', 'Search', 'New', 'Delete', and 'Help'. Below the toolbar is a navigation bar with icons for back, forward, and page numbers (1, 2). A list of comment groups is displayed in a tree view: 'Comment Group' (selected), 'Planning Department', 'Licensing Department' (selected), and 'Health Department'. A sub-dialog titled 'Comment Group: Licensing Department' is open, containing its own toolbar and a table with one row: 'Building' under 'Group', 'Commercial' under 'Type', 'Alteration' under 'Subtype', and 'NA' under 'Category'.

b. Click Look Up.

Civic Platform displays a navigation tree with the record types, checklists, inspections, or workflows created for your system.

The screenshot shows the 'Record Types' tab of the 'Comment Group: Licensing Department' dialog. The navigation bar includes 'Submit', 'Search', 'Cancel', and 'Help'. Below the navigation bar are tabs for 'Comment Type', 'Record Types' (which is selected), 'Inspections', 'Workflow', and 'Guide Sheet'. A tree view under the 'Record Types' tab shows 'Record Type' expanded, with sub-options for AMS, Building, CaseManagement, Enforcement, Licenses, Planning, and ServiceRequest.

3. Use the + and - buttons to expand and collapse the tree to find the record type, checklist, inspection, or workflow to which you want to assign the comment group.

Comment Group: Licensing Department

Submit Search Cancel Help

Comment Type Record Types Inspections Workflow Guide Sheet

Record Type

- AMS
 - Facility
 - Boiler
 - Building
 - Fleet
 - Parks
 - Public Works
 - Sewer
 - Water
 - Building
 - CaseManagement
 - Enforcement
 - Licenses
 - Planning
 - ServiceRequest

4. Select the record type, checklist, inspection, or workflow to which you want to assign the comment group.

You can mark multiple check boxes to assign the comment group to multiple record types, checklists, inspections, or workflows.

Mark an item on a higher level to select everything below that level. Click the check box to clear marked items.

Comment Group: Licensing Department

Submit Search Cancel Help

Comment Type Record Types Inspections Workflow Guide Sheet

Record Type

- AMS
 - Facility
 - Boiler
 - Preventative Maintenance
 - Building
 - Capital Improvement
 - Paint
 - Repair
 - Fleet
 - Parks
 - Public Works
 - Sewer
 - Water

5. Click Submit.

Civic Platform assigns the items to the specified comment group.

Comment Group: Licensing Department

Menu ▾ Look Up Delete Help

Comment Type (1) Record Types (6) Inspections (0) Workflow (7) Guide Sheet (0)

4 record(s) added successfully.

<input type="checkbox"/> Group	Type	Subtype	Category
<input type="checkbox"/> AMS	Facility	Building	Repair
<input type="checkbox"/> AMS	Facility	Building	Paint
<input type="checkbox"/> AMS	Facility	Building	Capital I...
<input type="checkbox"/> AMS	Facility	Boiler	Preventat...
<input type="checkbox"/> Building	Commercial	Alteration	NA

Managing Associated Record Types

In this portlet you can view the record types for the standard comment group. You can also assign the group to record types and delete the assignation.

To manage the record types for the standard comment group

1. Navigate to the comment group that you want to update associated record types.
2. Click the **Record Types** tab.
Civic Platform displays the Record Type list portlet.
3. Do any of the following:
 - To associate a record type with the standard comment group, see [Assigning a Comment Group](#).
 - To remove a record type from the standard comment group, select the record type and then click **Delete**.

Managing Associated Inspections

In this portlet you can view the inspections for the standard comment group. You can also assign the group to inspections and delete the assignation.

To manage the inspections for the standard comment group

1. Navigate to the comment group that you want to update associated inspections.
2. Click the **Inspections** tab.
Civic Platform displays the Inspections list portlet.
3. Do any of the following:
 - To associate an inspection with the standard comment group, see [Assigning a Comment Group](#).
 - To remove an inspection from the standard comment group, select the inspection and click **Delete**.

Managing Associated Workflow Tasks

In this portlet you can view the workflow tasks for the standard comment group. You can also assign the group to workflow tasks and delete the assignation.

To manage the workflow tasks for the standard comment group

1. Navigate to the comment group that you want to update associated workflow tasks.

2. Click the **Workflow** tab.

Civic Platform displays the Workflow Task list portlet.

3. Do any of the following:

- To associate a workflow task with the standard comment group, see [Assigning a Comment Group](#).
- To remove a workflow task from the standard comment group, select the workflow task and then click **Delete**.

Managing Associated Checklists

In this portlet you can view the checklists for the standard comment group. You can also assign the group to checklists and delete the assignation.

To manage the checklists for the standard comment group

1. Navigate to the comment group that you want to update associated checklists.

2. Click the **Checklist** tab.

Civic Platform displays the checklist list portlet.

3. Do any of the following:

- To associate a checklist with the standard comment group, see [Assigning a Comment Group](#).
- To remove a checklist from the standard comment group, select the checklist and click **Delete**.

Managing Standard Comment Types

Topics

- [Creating a Comment Type](#)
- [Adding an Existing Comment Type](#)
- [Deleting a Comment Type](#)

Creating a Comment Type

After you create a comment type, you cannot change its name or the comment group it belongs to. To change these details, you must delete the comment type, first deleting its relationships with comments, and then create a new comment type with the name and the comment group you want.

When you create a comment type, you can create one comment along with it or leave it blank and add comments to it later. To add comments to an existing comment type see [Adding a New Comment](#).

To create a comment type

1. Navigate to the comment group for which you want to create a comment type. For instructions on how to find a comment group, see [Viewing a Comment Group](#).

2. Click the **Comment Type** tab.

Civic Platform displays the Comment Type list portlet.

The screenshot shows the 'Comment Group Maintenance' interface. At the top, there are buttons for 'Menu', 'Assign', 'Search', 'New', 'Delete', and 'Help'. Below these are navigation arrows and a page number indicator '1 2'. A list of comment groups is displayed, with 'Licensing Department' selected and highlighted in blue. Below this, a detailed view for 'Comment Group: Licensing Department' is shown, featuring buttons for 'Menu', 'New', 'Look Up', 'Delete', and 'Help'. A navigation bar at the bottom includes links for 'Comment Type (1)', 'Record Types (1)', 'Inspections (0)', 'Workflow (7)', and 'Guide Sheet (0)'. Another list of comment types is shown, with 'REVIEW' selected.

3. Click New.

Civic Platform displays the New Comment Type portlet.

The screenshot shows the 'New Comment Type' form. It includes a header with 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help' buttons. Below this, there are three required fields: 'Comment Group *' (set to 'Licensing Department'), 'Comment Type *' (empty), and 'Comment ID *' (empty). There is also a 'Comment Name' field and a 'Comment' rich-text area. A link 'check spelling' is located at the bottom of the comment area.

4. Complete the following required fields:

Comment Type Enter a name for the comment type. It is a good idea to select comment type names that correspond with the forms you use them for. For example, you could create Code Enforcement and Inspection comment types.

Comment ID Enter a value, either alphabetic or numeric. You can devise your own system for assigning this value.

5. You can add a comment to this comment type now or wait until later. To add a new comment later, see [Adding a New Comment](#). To add an existing comment later, see [Adding an Existing Comment Type](#). To add a comment now, complete the following fields:

Comment Name Enter a descriptive name for the comment, to help users select the appropriate comment from a list of available comments.

Comment Enter the text of the comment. This text is the exact wording that populates user forms when users select this comment from a list of standard comments.

6. Click Submit.

Civic Platform saves the comment type and any comment created with it.

Adding an Existing Comment Type

You can include comment types in multiple comment groups. For example, you can use the Violation comment type for both inspections and for asset condition assessments. You can add the Violation comment type to comment groups assigned to both record types.

1. Navigate to the comment group to which you want to add a comment type. For instructions on how to find a comment group, see [Viewing a Comment Group](#).

2. Click the **Comment Type** tab.

Civic Platform displays the Comment Type portlet.

3. Click **Look Up**.

Civic Platform displays the Comment Type Look Up portlet.

Comment Group: Licensing Department

Comment Type

Menu ▾ Submit Reset Cancel Help

4. Enter the name of the comment type you want to find in the **Comment Type** field.

To see a complete list of available comment types, leave the field blank.

5. Click Submit.

Civic Platform returns a list of comment types that matches your search criterion.

Comment Group: Licensing Department

Comment Type Record Types Inspections Workflow Guide Sheet

Comment Type

TEMPORARY...
STREETS
SPRINKLER...
REVIEW
PUBLIC WORKS

6. To add a comment type from the list, mark the check box beside the comment type.

7. Click Submit.

Civic Platform adds the comment type to the current Comment Group.

<input type="checkbox"/> Comment Type	Comment Group
<input type="checkbox"/> STREETS	Licensing Department
<input type="checkbox"/> REVIEW	Licensing Department

Deleting a Comment Type

When you delete a comment type, you are deleting the relationship between the comment group and the comment type. Civic Platform does not delete the comment type from the database and you can still add it to comment groups.

You can delete a Comment Type in two ways. Select the comment type record and delete it, or delete all the comments contained in the comment type. To delete comments from a comment type, see [Deleting a Comment](#).

To delete a comment type

1. Navigate to the comment group from which you want to delete a comment type. For instructions on how to find a comment group, see [Viewing a Comment Group](#).
2. Click the **Comment Type** tab.
Civic Platform displays the Comment Type portlet.
3. Select the comment type you want to delete.
4. Click **Delete**.
Civic Platform deletes the comment type from the comment group. Civic Platform does not delete the comment group from the database and you can still add it to comment groups.

Managing Standard Comments

You can add a comment to a comment type when you create the comment type. For information on creating a comment type, see [Creating a Comment Type](#).

Topics

- [Adding a New Comment](#)
- [Viewing a Comment](#)
- [Editing a Comment](#)
- [Deleting a Comment](#)

Adding a New Comment

You can add comments to comment types when you create them. You can also add additional comments to existing comment types.

To add a new comment

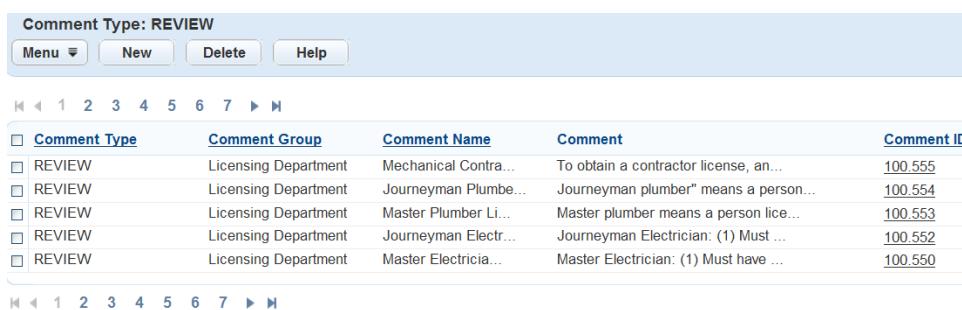
1. Navigate to the comment group that contains the comment type to which you want to add a comment.
See [Viewing a Comment Group](#).

2. Click the **Comment Type** tab.

Civic Platform displays the Comment Type portlet.

3. Click the name of the comment type to which you want to add a comment.

Civic Platform displays the Comment List portlet.

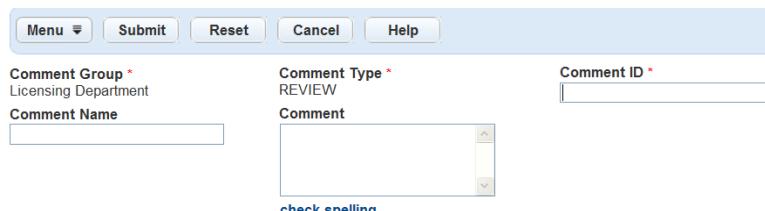


The screenshot shows a table titled "Comment Type: REVIEW". The columns are "Comment Type", "Comment Group", "Comment Name", "Comment", and "Comment ID". There are five rows of data:

Comment Type	Comment Group	Comment Name	Comment	Comment ID
REVIEW	Licensing Department	Mechanical Contra...	To obtain a contractor license, an...	100.555
REVIEW	Licensing Department	Journeyman Plumbe...	Journeyman plumber" means a person...	100.554
REVIEW	Licensing Department	Master Plumber Li...	Master plumber means a person lice...	100.553
REVIEW	Licensing Department	Journeyman Electr...	Journeyman Electrician: (1) Must ...	100.552
REVIEW	Licensing Department	Master Electricia...	Master Electrician: (1) Must have ...	100.550

4. Click **New**.

Civic Platform displays the New Comment portlet.



The screenshot shows the "New Comment" form. It includes fields for "Comment Group" (set to "Licensing Department"), "Comment Type" (set to "REVIEW"), "Comment Name" (empty), "Comment" (empty text area), and "Comment ID" (empty text input field). There is also a "check spelling" link at the bottom of the comment text area.

5. Complete these fields:

Comment ID	Enter a value, either alphabetic or numeric. You can devise your own system for assigning this value.
Comment Name	Enter a descriptive name for the comment, to help users select the appropriate comment from a list of available comments.
Comment	Enter the text of the comment. This text is the exact wording that populates user forms when users select this comment from a list of standard comments.

6. Click **Submit**.

Civic Platform saves the comment.

Viewing a Comment

To view a comment

1. Access the Comment Group Maintenance portlet ([Accessing the Comment Group Maintenance Portlet](#)).

2. Click the name of the comment group you want to view.

Civic Platform displays the Comment Types and Comments that belong to the selected Comment Group.

3. Click the **Comment Type tab.**

Civic Platform displays the Comment Type portlet.

4. Click the hyper linked name of the comment type that contains the comment you want to view.

Civic Platform displays the Comment List portlet.

5. Click the link for the name of the comment you want to view.

Civic Platform displays the Comment Detail portlet.

The screenshot shows a form with the following fields:

- Comment Group ***: Licensing Department
- Comment Name**: Journeyman Plumber Requireme
- Comment Type ***: REVIEW
- Comment ID ***: 100.554
- Comment**: "Journeyman plumber" means a person licensed under this chapter who: (1) has met the qualifications for registration
- check spelling**

A dropdown menu is open over the 'Comment Type' field, showing the definition: "Journeyman plumber" means a person licensed under this chapter who: (1) has met the qualifications for registration.

Editing a Comment

You can change the comment name and the text of the comment after it you create it.

Editing a comment in the Administration portlet does not change the comment as it appears where a user has loaded it into a form. Users must update each instance of a comment to reflect any administrator edits.

To edit a comment

1. Find the comment you want to edit. For instructions on how to find a comment, see [Viewing a Comment](#).

2. Edit the **Comment Name or **Comment** field. For a definition of these fields, see step 5 of [Adding a New Comment](#).**

3. Click Submit.

Civic Platform saves the changes to the comment.

Deleting a Comment

Delete a comment that is no longer frequently used from a comment type. When you delete all the comments contained in a comment type, you also delete the comment type.

To delete a comment

1. Find the comment you want to delete. For instructions on how to find a comment, see [Viewing a Comment](#).

Civic Platform displays the Comment List portlet.

The screenshot shows a table of comments for the REVIEW type:

<input type="checkbox"/> Comment Type	Comment Group	Comment Name	Comment	Comment ID
<input type="checkbox"/> REVIEW	Licensing Department	Mechanical Contra...	To obtain a contractor license, an...	100.555
<input type="checkbox"/> REVIEW	Licensing Department	Journeyman Plumbe...	Journeyman plumber" means a person...	100.554
<input type="checkbox"/> REVIEW	Licensing Department	Master Plumber Li...	Master plumber means a person lice...	100.553
<input type="checkbox"/> REVIEW	Licensing Department	Journeyman Electr...	Journeyman Electrician: (1) Must ...	100.552
<input type="checkbox"/> REVIEW	Licensing Department	Master Electricia...	Master Electrician: (1) Must have ...	100.550

2. Select the comment you want to delete.

3. Click Delete.

Civic Platform deletes the comment from the comment type.

Enforcement Violation Comments

This section contains the following topics:

- [Creating a Violation Code Comment Type](#)
- [Adding a Comment to the Violation Comment Type](#)

Creating a Violation Code Comment Type

Before you can create a standard comment for a violation, you must set up a violation code comment type. If you have already set up the violation code comment type, see [Adding a Comment to the Violation Comment Type](#).

To create a violation code comment type

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Agency Profile > Standard Comments**.

Civic Platform displays the Standard Comment Type List—Browse page.

Standard Comment Type List - Browse

Use this form to view the standard comments list
(Click the • below to select)

Comment Type
CHAPTER 14
CHAPTER 15
CHAPTER 16
CHAPTER 17
CHAPTER 18
CHAPTER 21
CHAPTER 23
CHAPTER 6
CHAPTER 8
CHAPTER 9

Add
New Comment

3. Click Add.

Civic Platform displays the Standard Comment—Add page.

Standard Comment – Add

Use this form to add new Standard Comment

Comment Type (Required)	<input type="text"/>
Comment ID (Required)	<input type="text"/>
Comment Name	<input type="text"/>
Comment	<input type="text"/>

Submit **Cancel**

4. Complete the necessary fields as described in [Code Enforcement Standard Comment Details](#).

5. Click Submit.

Civic Platform adds the violation comment to the list of standard comments.

Table 95: Code Enforcement Standard Comment Details

Comment Type	Enter a Violation Code and the comment appears in the Violation Codes drop-down list on the Violation—Add page where a user can choose the violation to add it to a citation. For more information on adding a violation, see “Adding a Violation to a Citation” in the <i>Accela Civic Platform User Guide</i> .
Comment ID	Enter an identification code for the violation comment. You should enter a code that helps identify what the code stands for. For example, for “Violation,” you might enter “VIO.”
Comment Name	Enter a name for the violation comment, such as Violation.
Comment	Enter any additional information you want attached to this violation comment. For example, if the violation were a payment violation, the comment might say, “Payment Overdue.”

Adding a Comment to the Violation Comment Type

If you want to add more than one comment or violation to the violation code comment type, you can do so in the standard comment function.

To add a comment to the violation comment type

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose **Review > Std Comment**.

Civic Platform displays the Standard Comment Type List—Browse page.

Standard Comment Type List - Browse

Use this form to view the standard comments list
(Click the ● below to select)

Comment Type
CHAPTER 14
CHAPTER 15
CHAPTER 16
CHAPTER 17
CHAPTER 18
CHAPTER 21
CHAPTER 23
CHAPTER 6
CHAPTER 8
CHAPTER 9

Add
New Comment

◀ P. 1 2 3 ▶

3. Click the red dot next to the Comment Type “Violation Code.”

4. Click **Add**.

Civic Platform displays the Standard Comment—Add page.

Standard Comment - Add

Use this form to add new Standard Comment

Comment Type (Required)	<input type="text"/>
Comment ID (Required)	<input type="text"/>
Comment Name	<input type="text"/>
Comment	<input type="text"/>

Submit **Cancel**

5. Complete the necessary fields as described in [Code Enforcement Standard Comment Details](#).

6. Click **Submit**.

Civic Platform adds the violation comment to the list of standard comments.

Configuring Global Search

Civic Platform provides a search engine to find information globally throughout the software. Users enter search criteria and Civic Platform displays results in a global search portlet grouped by information type.

The screenshot shows the Global Search interface with three main sections:

- Records:** Displays a table of records with columns: Number, Record Type, Short Notes, Location, Contact, Project Name, and Created Date. Some rows include links like [#9CAS-00000-00004](#), [#9PLB-00000-00066](#), etc.
- Locations:** Displays a list of locations with columns: Address, Parcel, and Owner. Includes links to specific locations like [141 NE State Capitol ST, Salem, OR 97301](#).
- Assets:** Displays a table of assets with columns: Asset ID, Asset Type, Asset Group, Location, Status, and Last Updated. Shows one entry: [STREET LIGHT](#) (Street Light).

Each section includes a page navigation bar at the bottom.

You can configure search to define how many max records return in a global search and how many result rows to display in a group results list page. For example, record result information is grouped together in pages and licensed professional result information is grouped together in pages. Within each group, a user can filter, page through, or sort through the result information.

The global search function works against indexed content in the Civic Platform database. To ensure the most accurate and up-to-date search results, configure a batch job to regularly index the Civic Platform database.

To configure global search:

1. Set the following FID(s) and Standard Choices (refer to the *Civic Platform Configuration Reference* for full details):
 - [8434-Global Search](#)
 - [GLOBAL_SEARCH_MAX_COUNT](#)
 - [BATCH_JOB_SERVICE_CATEGORY](#)
 - [GLOBAL_SEARCH_BUILD_INDEX_ENTITIES](#)
2. Create a Global Search Index Batch Job. See [Creating a Global Search Index Batch Job](#) for complete details.

CLOUD09 | Civic Platform

Batch Jobs

Job Type	Name	Job Status	Start Date	Start Time
Report	Daily Receipts	12/18/2015	01:00 AM	
Report	Report Automation		01:00 AM	
System	Test			
System	Accela_CRM_Integration	Complete		
Script	Create License Renewal Set	Complete		01:00 AM

Page 1 of 2 < >

New Execute Delete Help

Job Detail Job Schedule Log

Job Type * Name *

--Select--

Description

check spelling

E-mail

Create a new job

Accela Administr

Batch Jobs

Job Type	Name	Job Status	Start Date	Start Time	End Date	Frequency	Schedule Status
Report	Daily Receipts	12/18/2015	01:00 AM	12/18/2016	Daily	On Hold	
Report	Report Automation		01:00 AM		Once	On Hold	
System	Test				Once	On Hold	
System	Accela_CRM_Integration	Complete			Once	On Hold	
Script	Create License Renewal Set	Complete		01:00 AM	Daily	On Hold	

Page 1 of 2 < >

New Execute Delete Help

Job Detail Job Schedule Log

Job Type * Name *

System Global Search Rebuild Index

Description

check spelling

E-mail

--Select--

- ✓ Global Search Rebuild Index
- Recurring Related Inspection
- Send Hearing Notice Email

If you have added this value to the Standard Choice "BATCH_JOB_SERVICE_CATEGORY" then this value will appear in this drop down menu

Part 4: Managing Agency Communications and Events

Civic Platform provides functions to configure agency communications.

Related Information

[Working with Communication Manager](#)

[Setting Up Calendars](#)

[Social Media Integrations](#)

Working with Communication Manager

Communication manager is a centralized communications hub that consolidates Civic Platform's notification functionality into a single portlet.

Communication manager integrates with Microsoft Exchange and Outlook, enabling agency users to send meeting requests that they arrange in the calendar portlet, view the calendar availability of meeting attendees, and maintain Outlook emails and attachments in the Civic Platform database.

Communication manager also integrates with SMS text messaging services, enabling you to communicate with agency and public users by text message.

Click a topic title below for full details.

Related Information

[Prerequisites](#)

[Configuring General Settings](#)

[Configuring Account Settings](#)

[Viewing the 360-Degree Communications List](#)

[Viewing Communications Associated with Records](#)

[Manually Sending Emails and Text Messages](#)

[Managing Alerts](#)

[Managing Alert Rules](#)

[Announcements](#)

[Notification Templates](#)

[Variables](#)

[Customizing the Content of Agency Communications](#)

Prerequisites

Before you configure the communication manager settings described in this section, you must have a functioning installation of Microsoft Outlook/Exchange Server, and an SMS text messaging provider. When configuring communication manager, Civic Platform prompts you to enter key pieces of information from those software configurations, which enable Civic Platform to communicate with them. Accela provides an SMS Adapter to connect your SMS text messaging system with Civic Platform. Refer to the SMS Adapter section of the Accela Civic Platform Installation Guide for complete details.

You must also configure the Function IDs and Standard Choices related to this feature, before you configure communication manager settings. Refer to the Communication Manager sections of the Accela Civic Platform Configuration Reference for complete details.

Configuring General Settings

The general settings area is where you connect your Microsoft Exchange Server to Civic Platform. This is also where you establish system-level settings that enable agency users to send, receive, and store emails, calendar items, SMS text messages, and attachments.

Configure the following general settings first, and then proceed to [Configuring Account Settings](#).

Topics

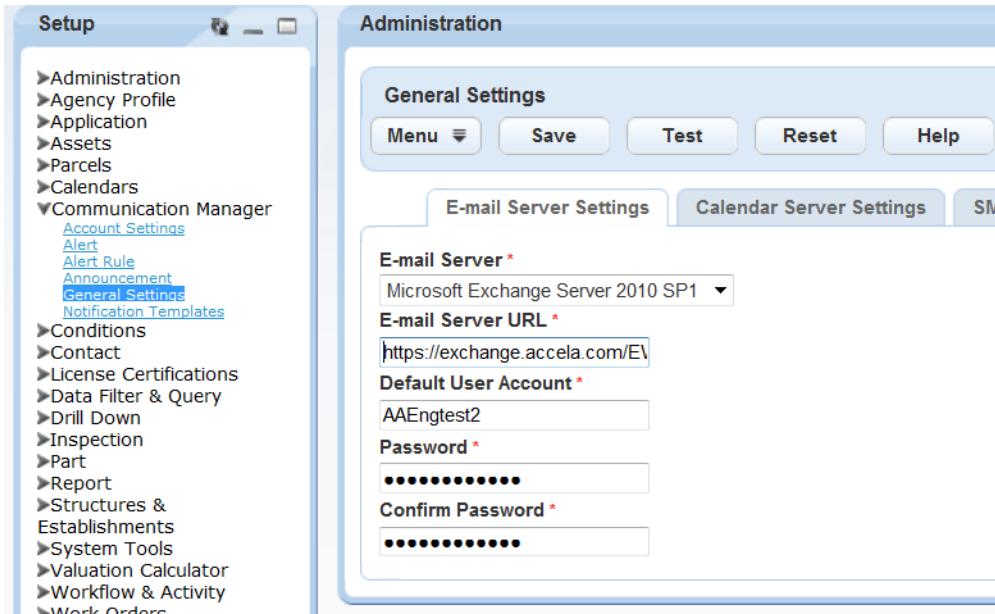
- [Email Server Settings](#)
- [Calendar Server Settings](#)
- [SMS Server Settings](#)
- [Attachment Settings](#)

Email Server Settings

Follow the instructions in this procedure to enable your Civic Platform system to communicate with your Microsoft Exchange Server.

To connect Civic Platform to your Microsoft Exchange Server

1. Go to **Civic Platform Administration > Communication Manager > General Settings**.
Civic Platform displays the general settings window.
2. Click the Email Server Settings tab.



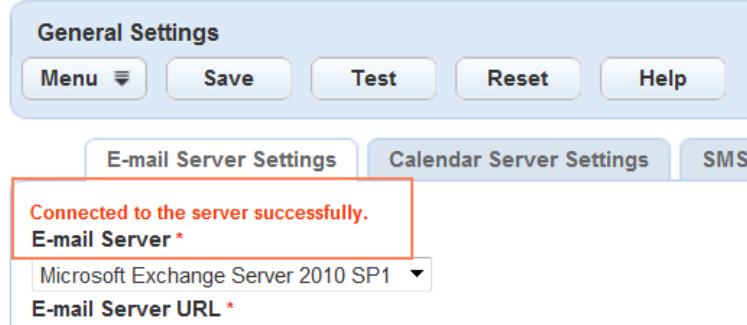
3. Complete these fields:

Email Server	Select the Microsoft Exchange Server version your agency uses. To take advantage of the functionality Communication Manager provides, you must choose a Microsoft Exchange Server. If you do not want to implement Communication Manager, select Standard Email Server in this field, and the values from your ServerConfig.properties file display in read-only format.
Email Server URL	Enter the URL to your Microsoft Exchange Server Host, for example: https://exchange.example.com/EX/Exchange.asmx.

Default User Account	Enter the user name of an active email account on your Microsoft Exchange Server to designate it as the default email account. If an agency user does not specify a display name in the from field, when Communication Manager sends system-level emails, it uses this default email account as the “sent from” address.
Password	Enter the password for the default email account.
Confirm Password	Re-enter the password.

4. Click **Test** to ensure the information you provided successfully connects Civic Platform to your Microsoft Exchange Server.

A confirmation message displays.



The screenshot shows the 'General Settings' window with the following interface elements:

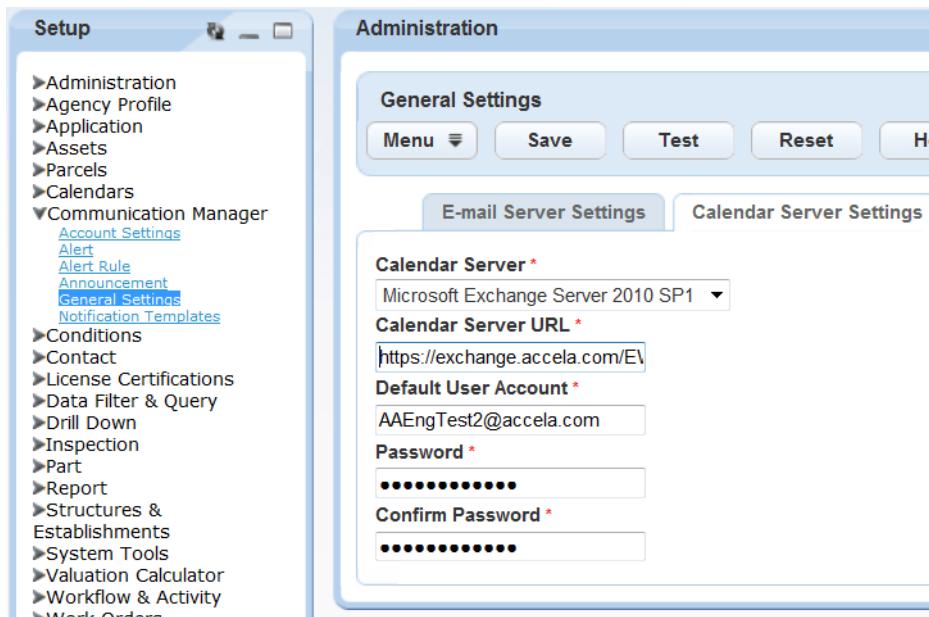
- General Settings** tab bar with buttons: Menu, Save, Test, Reset, Help.
- E-mail Server Settings** tab is selected.
- Connected to the server successfully.** (Text displayed in a red-bordered box).
- E-mail Server *** dropdown menu set to **Microsoft Exchange Server 2010 SP1**.
- E-mail Server URL *** input field.

5. If you receive a message indicating that Civic Platform failed to connect to your Exchange Server, revise your entries and test again until you receive a success message.
6. Click **Save**.

Calendar Server Settings

To configure calendar server settings

1. Go to **Civic Platform Administration > Communication Manager > General Settings**.
Civic Platform displays the general settings window.
2. Click the **Calendar Server Settings** tab.



3. Complete these fields:

Calendar Server	Select the Microsoft Exchange Server version your agency uses.
Calendar Server URL	Enter the URL to your Calendar Server.
Default User Account	Enter the user name of an active email account on your Microsoft Exchange Server to designate it as the default email account Civic Platform uses for sending meeting requests. When Communication Manager sends system-level emails, it uses this default email account as the “sent from” address.
Password	Enter the password for the default user account.
Confirm Password	Re-enter the password.

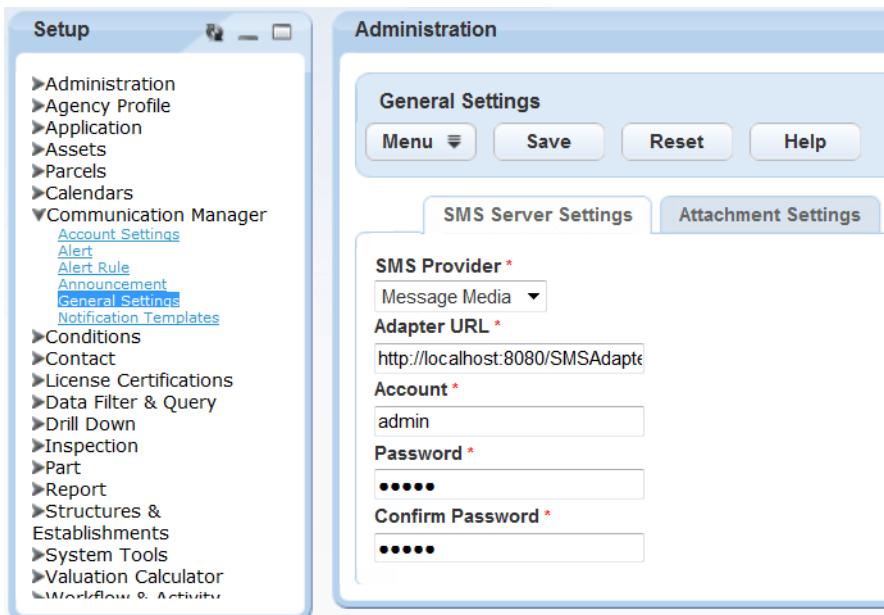
4. Click **Test** (see for complete details).

5. Click **Save**.

SMS Server Settings

To configure SMS server settings

1. Go to **Civic Platform Administration > Communication Manager > General Settings**.
Civic Platform displays the general settings window.
2. Click the SMS Server Settings tab.
Civic Platform displays the SMS Server Settings window.



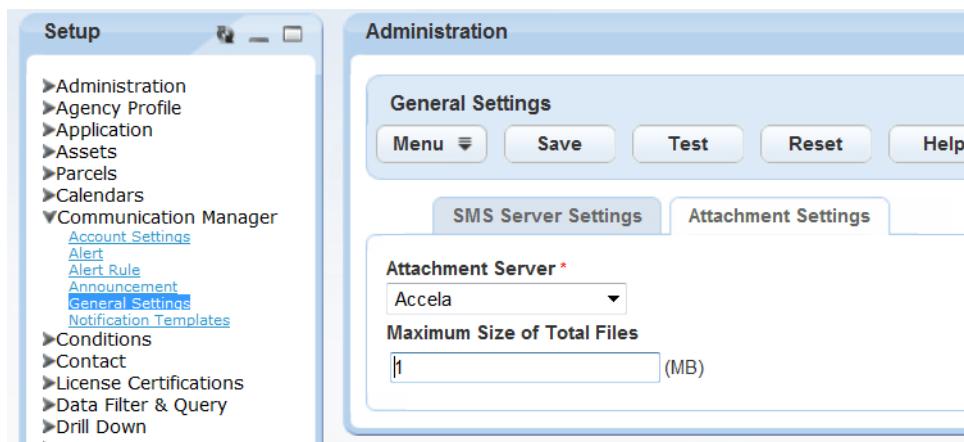
3. Complete these fields.

SMS Provider	Choose the SMS text messaging provider your agency uses. Administrators define the options available in this drop down list in the standard choice COMMUNICATION_SMS_PROVIDERS Refer to the Civic Platform Configuration Reference for more information on configuring standard choices.
Adapter URL	Enter the URL for your customized SMS adapter. Accela provides a generic adapter, which you must configure to reflect the details of your agency's SMS service provider. This adapter is a web service that enables Civic Platform to communicate with your SMS provider.
Account	Enter the user name you use to access your SMS provider's web service.
Password	Enter the password you use to access your SMS provider's web service.
Confirm Password	Re-enter the password.

Attachment Settings

To configure attachment settings

1. Go to **Civic Platform Administration > Communication Manager > General Settings**.
Civic Platform displays the general settings window.
2. Click the Attachment Settings tab.
Civic Platform displays the Attachment Settings window.



3. Complete these fields:

Attachment Server	Select the EDMS server where you want to store email attachments. Civic Platform populates the values in this drop-down list from this standard choice: EDMS. There is a limit of one EDMS server per agency for storing email attachments.
Maximum Size of Total Files	To further restrict the maximum allowable size of attachments for a single email, beyond the scope of Civic Platform's standard file size restrictions, enter a value in whole numbers here. This field works with the two standard settings Civic Platform uses to limit the size of attachments: First, the standard choice EDMS specifies the maximum allowable file size for each attachment. Second, the ServerConfig.properties file that resides on the Civic Platform web server specifies the maximum allowable file size for all attachments within a single email. The number you enter in this field must be equal to or less than the file size limit specified in your ServerConfig.properties file.

4. Click **Test** (see for complete details).

5. Click **Save**.

Configuring Account Settings

The account settings area is where you configure:

- Account details that define the accounts from which agency users send outgoing emails and SMS text messages.
- Display names that become available for agency users to choose in the “from” value of all system-generated communications. A subset of the display names becomes available in the “from” values of manually initiated emails, according to the user’s permission level.
- The option to retrieve all emails for the account from the Microsoft Exchange Server. For example, you might have a general, department-level email account for which you want to enable the retrieval and storage of all of the communications from and to the account in the Civic Platform database.

First implement Communication Manager by [Configuring General Settings](#), then configure the following Account Settings:

- [Email Account Settings](#)
- [SMS Account Settings](#)

Email Account Settings

Use the procedure below to set up each account that you want to make available for agency users to use for communicating with the public, and for retrieving emails to attach to records.

To configure email account settings

1. Go to **Civic Platform Administration > Communication Manager > Account Settings**.

2. Click **New**.

Civic Platform displays the account settings window.

3. Click the **Account Detail** tab.

The screenshot shows the Civic Platform Administration interface. On the left, there is a navigation tree with various modules like Administration, Agency Profile, Application, Assets, Parcels, Calendars, and Communication Manager. Under Communication Manager, 'Account Settings' is selected. The main area is titled 'E-mail Account: Aaengtest2@accela.com'. It has tabs for 'Account Detail' (which is active) and 'Permission'. The 'Account Detail' tab contains fields for 'E-mail Account' (set to Aaengtest2@accela.com), 'E-mail Address' (set to Aaengtest2@accela.com), 'Display Name' (set to Docteam), 'Password' (represented by a masked field), 'Confirm Password' (also represented by a masked field), and a checked checkbox for 'Retrieve E-mail from Server'. There is also a dropdown for 'Status' set to 'Active'.

4. Complete the following fields:

Email Account	Enter the user name of the email account. This user name must be a valid user name of the Microsoft Exchange server that you specify in Configuring General Settings .
Email Address	Enter the email address for the email account you specified in the previous field.
Display Name	Enter a display name for this account. This display name populates in the "from" values of notification templates, manual email messages, and manual text messages. Agency users can specify the display name for their department, which then displays as the sender of the email.
Password	Enter the password of the email account.
Confirm Password	Re-enter the password.
Retrieve Email from Server	Check this option to copy all emails sent from and to this email address to the Civic Platform database. When you select this option, the contents of this email account become accessible in the communication manager portlet's consolidated list of communications, organized by Inbox, Outbox, Sent Items, and Deleted Items.

5. Click **Test** to ensure the information you provided successfully connects Civic Platform to your Microsoft Exchange Server.

6. If you receive a message indicating that Civic Platform failed to connect to your Exchange Server, revise your entries and test again until you receive a success message.
7. Click **Submit** if you are creating a new account; Click **Save** if you are modifying an existing account.
8. Click the Permissions tab.
Civic Platform displays the Permissions window.
9. Click the Assign buttons to select an appropriate permission level for this account.



These permissions define which users have the ability to send manual emails from this account via a record's Communications tab (see [Viewing Records-related Communications](#) for more information). When you grant a user permission, the user's name displays as the "from" value for sending manual communications.

Refer to [Setting Up Security Policies](#) for information about assigning permissions.

10. Click **Submit**.

SMS Account Settings

Use the procedure below to configure outgoing SMS text messaging accounts.

SMS (Short Message Service) is a communications protocol for sending short text messages from computers to cellular devices. You must have an active, fully configured account with an SMS service provider before setting up SMS account settings in Civic Platform.

To configure SMS account settings

1. Go to **Civic Platform Administration > Communication Manager > Account Settings**.

Civic Platform displays the account settings window.

2. Click SMS Account.

3. Click **New**.

Civic Platform displays the SMS Accounts window.

4. On the Account Detail tab, complete these fields:

SMS Account	Enter the user name of the SMS account.
-------------	---

Display Name	Enter the name you want to display with the account when selecting “from” values for notification templates and communications manually initiated from the Communications tab of a record. Different departments at an agency can each have their own text message accounts. Users can select the appropriate “from” values for text messages sent from their department when you configure the text message account settings here.
Phone Number	Select the phone number for the SMS account. The SMS adapter defines the phone numbers available to choose from in this field. This field retrieves available options from the SMS adapter web service. This number is the sender number that displays to recipients of SMS messages.
Status	Active/Inactive

5. On the Permission tab, click the Assign buttons to select an appropriate permission level for this account.

 Assign Agency Assign Module Assign Group Assign Department Assign User

These permissions define which users have the ability to send manual text messages from this account via a record's Communications tab. When you grant a user permission, the user's name displays as a “from” value for sending manual communications.

Refer to [Setting Up Security Policies](#) for information about assigning permissions.

6. Click **Submit**.

Viewing the 360-Degree Communications List

Communication manager maintains a correspondence list that keeps track of all incoming and outgoing communications (also known as a 360-degree view).

The list initially displays in chronological order, but you can sort, filter, and search the correspondence list by title, communication type, from, to, sent date, and initiating event. You can use the operands “&” and “or” when filtering the correspondence list. For example, you can filter all communications of type = email or of type = SMS.

The correspondence list contains the following types of communications:

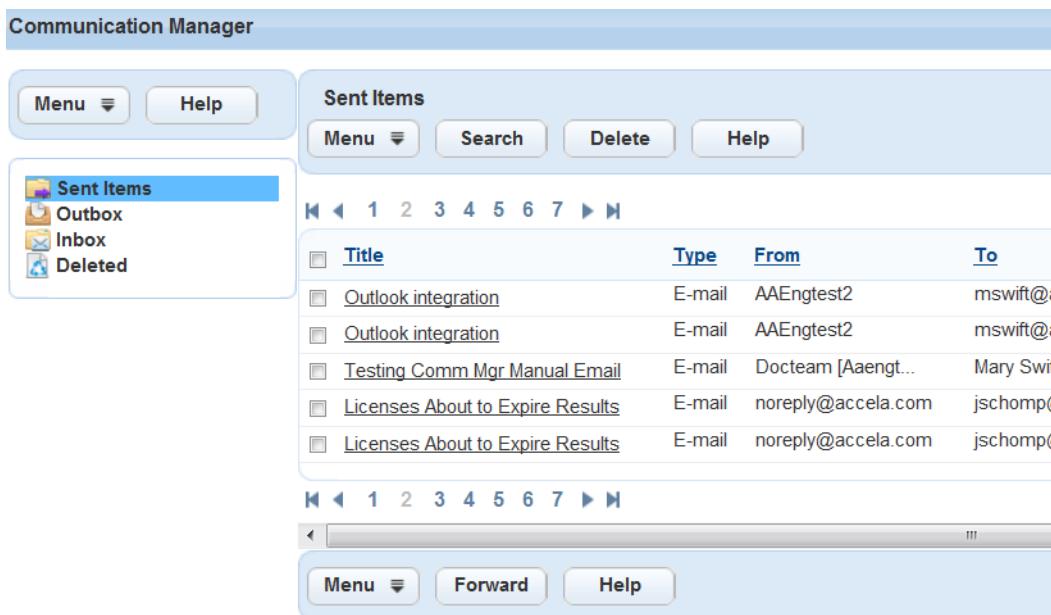
- Emails
- Text Messages
- Meeting Requests

To view the 360-degree communications list

1. Access the Communications Manager portlet by clicking the main link in Civic Platform.

If you do not have a main link to the Communications Manager portlet, create one by [Setting Up Your Console and Home Page](#).

Civic Platform displays the four categories of correspondence.



2. Click to view any of the following items:

Table 96: The 360-Degree Communications List

Sent Items	Click to view items sent from Civic Platform, including all sent items, items sent manually, items sent by events and scripts, and notifications.
Outbox	Click to view pending items that you have scheduled but not yet sent, items for which you have specified a delay time, bounced items, and items that Civic Platform cannot send due to a failure status.
Inbox	Click to view emails retrieved from external email servers. The Inbox stores emails only; it does not store text message and it does not store other types of communications. You must select the option Retrieve Email from Server in Email Account Settings for emails to display here.
Deleted	Click to view deleted and/or restore deleted items.

Viewing Communications Associated with Records

The Records portlet contains a Communications tab where you can:

- View all the communications, incoming and outgoing, related to a selected record.
- Manually initiate communications (emails and text messages) relevant to a particular record. Emails sent from the Records portlet automatically inherit the record ID, and Civic Platform maintains it as part of the record.

Viewing Records-related Communications

Use the procedure below to view all communications related to a particular record.

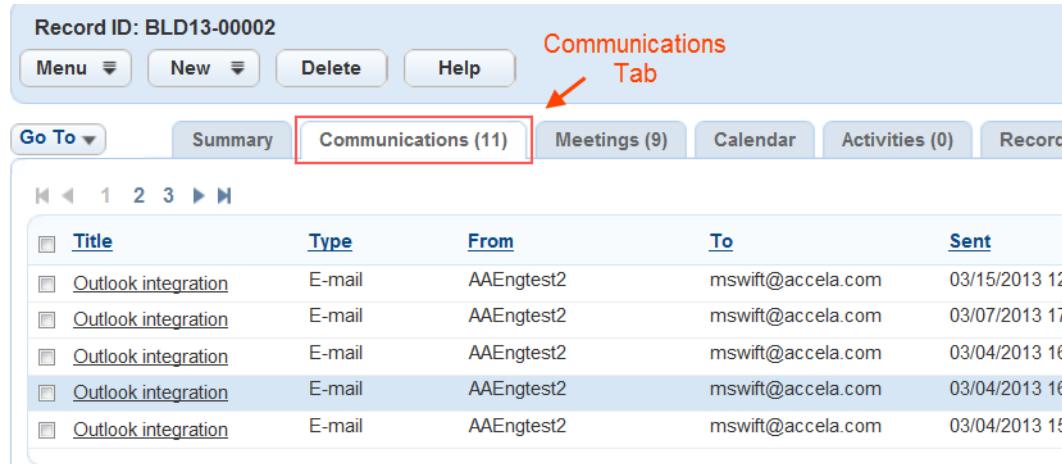
To view communications for a specific record

1. To enable this feature, set this FID to full access: 8492-Communication List.
2. Access the Records portlet by clicking the main link in Civic Platform.

If you do not have a main link to the Records portlet, create one by [Adding a Main Link](#).

3. Select a record.
4. Click the Communications tab. If you do not have a Communications tab, add it by [Adding a Tab Menu to a Template Menu](#).

Civic Platform displays the Communications tab.



The screenshot shows the Civic Platform interface for a record with ID BLD13-00002. At the top, there are buttons for 'Menu', 'New', 'Delete', and 'Help'. To the right of these is a red arrow pointing to the 'Communications Tab' label above the tab bar. The tab bar includes 'Go To', 'Summary', 'Communications (11)' (which is highlighted with a red box), 'Meetings (9)', 'Calendar', 'Activities (0)', and 'Record'. Below the tabs is a navigation bar with arrows for page navigation and a list of 11 communications. The communication list table has columns for Title, Type, From, To, and Sent. Each row contains a checkbox, the communication title, its type (E-mail), the sender (AAEngtest2), the recipient (mswift@accela.com), and the send date (e.g., 03/15/2013 12:).

	Title	Type	From	To	Sent
<input type="checkbox"/>	Outlook integration	E-mail	AAEngtest2	mswift@accela.com	03/15/2013 12:
<input type="checkbox"/>	Outlook integration	E-mail	AAEngtest2	mswift@accela.com	03/07/2013 17:
<input type="checkbox"/>	Outlook integration	E-mail	AAEngtest2	mswift@accela.com	03/04/2013 16:
<input type="checkbox"/>	Outlook integration	E-mail	AAEngtest2	mswift@accela.com	03/04/2013 16:
<input type="checkbox"/>	Outlook integration	E-mail	AAEngtest2	mswift@accela.com	03/04/2013 15:

5. Click a column heading to change the sort order of the communications list.
6. Click a title link to go to the details of the communication.

Civic Platform displays the details of the communication.

Viewing Consolidated Record Activities

Communication manager includes a Consolidated Record Activities tab. This tab enables you to view a summary list of all communications relevant to a particular record. Relevant communications include: email messages, SMS text messages, meetings, inspections, documents, activities and workflow history.

To view consolidated record activities

1. To enable this feature, set this FID to full access: 8493-Consolidated Record Activities.
2. Access the Records portlet by clicking the main link in Civic Platform.
If you do not have a main link to the Records portlet, create one by [Adding a Main Link](#).
3. Select a record.
4. Click the Consolidated Record Activities tab. If you do not have a Consolidated Record Activities tab, add it by [Adding a Tab Menu to a Template Menu](#).

Civic Platform displays the Consolidated Record Activities tab.

The screenshot shows the Civic Platform Records portlet. At the top, there is a toolbar with buttons for Menu, Refine Search, New, Create By Form, Create From Model, Delete, GIS, and other options. Below the toolbar is a navigation bar with arrows for navigating through records.

<input type="checkbox"/> Record #	Record Type	Status
<input type="checkbox"/> ACS-A-13-00006	Licenses/Armored Car Services/Armored Car Carrier/Application	Application Received

Below the list is a detailed view for Record ID: ACS-A-13-00006. It includes a toolbar with Menu, Search, and Help, and a navigation bar with Go To, Fee (0), Payment, Consolidated Record Activities (8), Communications (3), and Activities (1).

Date	Content	Status	Action By
04/18/2013 01:01:58	Initial Investigation	Rescheduled	admin administr...
04/18/2013 01:01:58	Initial Investigation	Scheduled	Carol Gong
04/18/2013 00:46:43	[New] Cancel Meeting: Send-02 carol	Failed	vera.peng@achie...
04/18/2013 00:33:38	Meeting Pop-Up has been reschedule. Failed		elena.shi [Feti...
04/18/2013 00:31:00	NOTICE OF EXAM CANCELLED	Failed	New York Depart...
04/18/2013 00:00:00	Phone call activity	Waiting on some...	admin administr...
04/17/2013 21:09:23	cute cat.jpg	Uploaded	admin administr...
04/17/2013 00:00:00	Application Intake	Received	admin administr...

Manually Sending Emails and Text Messages

To initiate communications manually

1. Access the Records portlet by clicking the main link in Civic Platform.

If you do not have a main link to the Records portlet, create one by [Setting Up Your Console and Home Page](#).

2. Select a record.
 3. Click the Communication tab.
 4. Click **New > Email** or **New > SMS (Text Message)** to manually initiate communication.
- Civic Platform displays one of the following.

Record ID: BLD13-00002

Menu Send Reset Attach Cancel Help

Communication Detail Related Entities

From *
--Select-- ▾

Importance
Normal ▾

Designated Send Date

Time
00 ▾ : 00 ▾

To

Cc

Bcc

Title

Attachment(s)

Content *

Arial ▾ 1 (8 pt) ▾ **I** U | | | |

Record ID: BLD13-00002

Menu Send Reset Cancel Help

Communication Detail Related Entities

From *
-Select--

Designated Send Date

Time
00 : 00

To *

Content *

[check spelling](#)

Comments

[check spelling](#)

5. Complete these fields:

Table 97: Manually Initiated Email and Text Message Fields

Email Fields:

Title	Enter a subject for the email.
Content	Enter the content of the message. You can use HTML code to create the content. You can also add parameters and embed hyperlinks to the Record Detail page in this field. You must define the parameters and URL in the EMSE scripts. For information on how to define parameters and embed hyperlinks, see Embedding Links to Record Detail Page .
From	Choose a value from the drop-down list. An administrator defines the values that populate this field. Refer to the Display Name setting in communication manager account settings.
To, Cc, Bcc	Enter an email address or click the record selection icons to the right of the fields to specify the recipient(s) of the message (Contact/Owner/Licensed Professional/ Public User).
Importance	Select an importance: low, normal, or high. Normal is the default.
Send Date/Send Time	Specify a date and time for Civic Platform to send the communication. This field is mandatory.
Comments	Enter the purpose of the communication, and any useful context you want to retain regarding the communication. Civic Platform does not send this information to email servers.
Send Button	Click to send the email or text message.

Attach Button	Click to upload documents as attachments to the email. After you attach a document the name of the document displays. If you want to remove the attachment, click the X button next to the attachment.
Reset Button	Click to remove all attachments and content from the message and reset all fields to blank fields.
Text Message Fields:	
From	Choose a value from the drop-down list. An administrator defines the display name values that populate the From field. Refer to the Display Name setting in communication manager account settings.
To	Enter a cellular phone number or click the record selection icons to the right of the fields to specify the recipient(s) of the message (Contact/Owner/Licensed Professional/ Public User).
Content	Enter the content of the message.
Designated Send Date	Specify a date and time for Civic Platform to send the communication. This field is mandatory.
Comments	Enter the purpose of the communication, and any useful context you want to retain regarding the communication. Civic Platform does not send this information to SMS servers.
Send Button	Click to send the text message.
Reset Button	Click to remove all content from the message and reset all fields to blank fields.

6. Click Send.

Managing Alerts

Topics

- [Creating an Alert](#)
- [Editing an Alert](#)
- [Deleting an Alert](#)
- [Managing Alert Recipients](#)
- [Creating a Time Variable Alert](#)

Creating an Alert

Privileged users can create alerts to notify groups at your agency of all kinds of events. After you create an alert it displays in the Alerts portlet, where you can edit, delete, and manage its recipients.

To create an alert

1. Go to **Civic Platform Administration > Communication Manager > Alert**.
Civic Platform displays the Alert window.
2. Click **New**.
Civic Platform displays a Message Type drop-down field in the record tab.
3. Select one of the following options from the **Message Type** drop-down field:
 - If you want to send the alert as an email message, choose **Email**.

- If you want to post the alert message to the Alert portlet, choose **Alert Message**.

4. Click **Submit.**

Civic Platform refreshes the form with fields appropriate for the message type.

Message	Type	Duration	Duration Unit	Alert ID
The publi...	Emergency...	0		841
A new lic...	Alert Mes...	10	Days	1477

5. Complete any of the fields that display.

For a list of field descriptions, see [Table 98: Alert Detail](#).

6. Click **Submit.**

Civic Platform displays a confirmation message and enables the Recipient and Rules tabs.

7. Choose the alert recipients.

See [Managing Alert Recipients](#).

If you want to apply an alert rule to govern the time frame for sending an alert, see [Applying an Alert Rule to an Alert](#).

Table 98: Alert Detail

Content	Enter the text of the alert message. In addition to the standard text, you can also enter parameters for variables. Click the selection icon to select a parameter from a list. See Filtering the Display of Data for a complete list of variable parameters. For additional variables that pertain directly to Accela Civic Platform - Asset, see Table 99: Asset Management Alert Message Variables .
Duration	Enter how long the alert message should remain in the Alert portlet.
External Recipients	If you are sending the alert to people outside of your agency, select the kind of external recipient from the drop-down. For example, Contacts.
Message Type	Indicates whether the alert is in the form of an email or as an alert message in the Alert portlet. After you create an alert message, you cannot change the message type.
Status	Use the drop-down field to enable or disable the alert. The alert duration does not begin, nor does the alert display, until you enable the alert.

Unit	Select the units for the quantity in the Duration field (Days, Hours, Minutes, or Seconds).
-------------	---

Table 99: Asset Management Alert Message Variables

Variable	Name	Description
\$\$altID\$\$	Alt ID	The asset's alternate ID.
\$\$wotemplate\$\$	Work Order Template	Template used to create the asset's associated work order.
\$\$scheduledate\$\$	Schedule Date	Scheduled asset condition assessment date.
\$\$estprodunits\$\$	Est. Prod Units	Estimated production units for a work order.
\$\$actualprodunits\$\$	Actual Production Units	Actual production units for a work order.
\$\$estcostperunit\$\$	Est. Cost Per Unit	The estimated cost per production unit for a work order. System administrators define this value at the Application Type level.
\$\$costperunit\$\$	Cost Per Unit	The cost per unit of production for a work order.
\$\$estjobcost\$\$	Est. Job Cost	Estimated total cost for the work order. This value is the product of the Cost Per Unit and the Est. Prod. Unit values.
\$\$totaljobcost\$\$	Total Job Cost	Total cost of the job, defined by a work order.
\$\$assetgroup\$\$	Asset Group	Name of an asset group.
\$\$assettype\$\$	Asset Type	Name of an asset type.
\$\$assetID\$\$	Asset ID	Asset identification name or number.
\$\$assetstatus\$\$	Asset Status	Status of an asset, whether Active or Expired.
\$\$classtype\$\$	Asset Class Type	Name of an asset class type.
\$\$dateofservice\$\$	Date of Service	Date of an asset's activation or when you placed it into service.
\$\$usefullife\$\$	Useful Life	Number of years you expect to use an asset.
\$\$assetrecordstatus\$\$	Asset Record Status	Status of the asset record, whether Active or Inactive.
\$\$assetdesc\$\$	Asset Description	Description of an asset.
\$\$currentvalue\$\$	Current Value	An asset's current value.
\$\$depreciationvalue\$\$	Depreciation Value	Dollar amount of an asset's value after depreciation.
\$\$depreciationamount\$\$	Depreciation Amount	Dollar amount of an asset's depreciation.
\$\$assetstreetnumberstart\$\$	Street # (start)	Initial street number of a street number range.
\$\$assetstreetnumberend\$\$	Street # (end)	Final street number of a street number range.
\$\$assetstreetprefix\$\$	Prefix	Any part of an address that comes before the street name or number, such as North Windsor Dr.
\$\$assetunitnumberstart\$\$	Unit # (start)	Initial unit number, for example apartment number, of a unit number range.
\$\$assetunitnumberend\$\$	Unit # (end)	Final unit number, for example apartment number, of a unit number range.
\$\$assetunittype\$\$	Unit Type	Type of unit, for example, apartment or condominium.
\$\$assetstreetdirection\$\$	Direction	Street direction that precedes the street name, for example West Broadway.

Variable	Name	Description
\$\$assetstreetname\$\$	Street Name	Street name of an asset's address.
\$\$assetstreettype\$\$	Street Type	Suffix used for a street, for example Lane or Boulevard.
\$\$assetstreetsuffix\$\$	Street Suffix (direction)	Street direction that follows the street name, for example 600 Maple South.
\$\$assetcity\$\$	City	City in which an asset resides.
\$\$assetstate\$\$	State	State in which an asset resides.
\$\$assetzip\$\$	Zip	ZIP code for an asset's mailing address.

Editing an Alert

This section describes how to edit an alert.

To edit an alert

1. Go to **Civic Platform Administration > Communication Manager > Alert**.
Civic Platform displays the Alert window.
2. Click the link to the alert you want to edit.
Civic Platform displays the alert details.
3. Edit information in the displayed fields.
For a list of field descriptions, see [Table 98: Alert Detail](#).
4. Click **Submit** to save your changes.
Civic Platform displays a confirmation message, and updates the alert list.
5. Make any changes to the alert recipients, as needed. See [Managing Alert Recipients](#).
6. Make any changes to the alert rule that governs the alert, as needed. See [Applying an Alert Rule to an Alert](#).

Deleting an Alert

Make sure the alert you select is the one you want to delete. If you delete the wrong alert, you must recreate it.

To delete an alert

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).
2. Choose Communication Manager > Alert.
3. Select the alert you want to delete.
4. Click **Delete**.
Civic Platform displays a confirmation message.

Managing Alert Recipients

After you create an alert message, you can determine who should receive it. You can send an alert to your entire agency or select certain departments, user groups, and even individual users within your agency.

If you no longer need a recipient to receive the alert, you can remove the recipient from the list. Removing a recipient from this list does not delete the recipient from your system.

For more information on managing alert recipients, see [Setting Up Security Policies](#).

Creating a Time Variable Alert

Use time variables in alerts to notify specific users when, for example, a user creates a service order and a specific amount of time elapses before they assign the service order to a user.

You can use the following time variables in alerts:

- \$\$Today\$\$
- \$\$Today+N\$\$
- \$\$Today-N\$\$

To configure an alert with a time variable

1. Navigate to V360 Administration > Communication Manager > Alert Rule.

2. Create a new alert rule with the following parameters:

Type: Alert Message

Rule Items: Record - Open Date <= \$\$TODAY-2\$\$ AND Record - Assigned to Staff is null

Enabled: Yes

Name	Description	Type	Enabled
Record Opened 2 days		Aler...	Yes
Service Record - Not assigned	Service R...	Time...	Yes

Details tab selected. Rule Item configuration:

Name: Service Record - Not assigned
Description: Record is opened for 72 hours.
Type: Time Alert
Rule Item:

Open Parenthesis	Object	Property	Relation Operator	Literal Value	Close Parenthesis	Logical Operator
<input type="checkbox"/>	Record	Record - Opened Date	<=	\$\$TODAY-2\$\$	<input type="checkbox"/>	AND
<input type="checkbox"/>	Record	Record - Assigned to Staff	IS NULL		<input type="checkbox"/>	

Associated Objects tab selected. Expression: [empty]

3. Click **Submit**.

4. Go to Communication Manager > Alert.

5. Create a new alert with message type AlertMessage.

6. Specify the content, duration, and status (enabled).

The screenshot shows the Civic Platform Alert interface. At the top, there is a header bar with buttons for 'Alert', 'Menu', 'New', 'Delete', and 'Help'. Below this is a table listing alerts with columns: Message, Type, Duration, Duration Unit, and Alert ID. The table contains five rows of data. The last row, 'Time aler...', has a blue selection bar at the bottom. Below the table is another set of buttons: 'Menu', 'Submit', 'Reset', and 'Help'. At the bottom of the page, there are tabs for 'Message', 'Recipient', and 'Alert Rule'. The 'Message' tab is active, showing a content area with a rich text editor containing the message '\$\$capID\$\$ is opened for 48 hours; please assign owner to follow up.' Below the content area are fields for 'Duration' (set to 1) and 'Unit' (set to Days). There is also a 'Status' dropdown set to 'Enabled'.

7. Click **Submit**.
8. Open the alert.
9. On the Recipient tab, click Assign User to specify the user you want to notify.
10. On the Alert Rule tab, click Look Up to specify the alert rule you created in .

To validate that the alert is working

1. Create or modify a test record with an opened date more than 2 days in the past (for example, 10/21/2013) and a scheduled date after the opened date (for example, 10/30/2013).
2. Click the Alerts link at the top of the console in Civic Platform to validate that the alert triggers successfully:

The screenshot shows the Civic Platform Alerts page. At the top, there is a navigation bar with links for 'HOME', 'NAVIGATION', 'CREATE NEW', 'MAPS', 'John Q Smith', 'My Console', 'Alerts (1)', 'Console Options', and 'Sign Out'. Below the navigation bar is a search bar and a help icon. The main content area is titled 'Alerts' and contains a table with a single row. The table has columns: 'Message' and 'Content'. The 'Content' field contains the message 'Demo1025. The record 130PRB-00000-00002 is opened for two days, please assign a owner to it.' This message is highlighted with a red border.

Managing Alert Rules

For instructions on setting up alert messages and recipients, see [Creating an Alert](#).

Topics

- [Creating an Alert Rule](#)
- [Editing an Alert Rule](#)
- [Deleting an Alert Rule](#)
- [Working with Alert Rule Associations](#)

Creating an Alert Rule

This section describes how to create an alert rule. You can set up an alert rule with multiple conditions. For example, you might want to send an alert to a manager if someone creates an item of a certain type and of a particular priority. You enter each rule item in the same way, combining rules with the appropriate logical operator. Use the parentheses to group two or more conditions.

Sending a Message Immediately

This rule is typically the most common rule. When an action happens, the alert rule triggers an immediate response. For example, you might want to send an alert to a department manager immediately when someone opens an item with a Priority of “1.”

To send a message immediately

1. Go to **Civic Platform Administration > Communication Manager > Alert Rule**

Civic Platform displays the Alert Rule window.

2. Click **New**.

Civic Platform displays a blank form.

Open Parenthesis	Object *	Property *	Relation Operator *	Literal Value
<input type="checkbox"/>	--Select--	--Select--	--Select--	

3. Complete the following fields:

Name	Enter the name of the alert rule.
Description	Enter a description of what the alert rule does. For example, you can describe the condition that initiates alert, such as “Service Request Closed,” or describe the kind of alert rule, such as “Close Request Alert.”
Enabled	Select “Yes” to enable the alert rule, making it available to apply to alerts; otherwise, select “No.” Disabling rules enables you to deactivate them without deleting them from Civic Platform.

4. Use the **Type** drop-down list to choose the **Alert Message** option.
5. Define one or more conditions of the alert rule. For each condition, enter information in the appropriate field.
For definitions of the fields, see [Conditions Field Descriptions](#).
6. If you want to add an additional condition, click **New Item** and complete the fields explained in .
7. If desired, click **Show Expression** to review the expression Civic Platform uses to evaluate the condition.
8. Click **Submit**.
Civic Platform adds the alert rule to the list and enables the **Associated Objects** tab.
9. To review a list of any associated objects, such as Alerts, click the **Associated Objects** tab.
For instructions on applying an alert rule to an alert, see [Applying an Alert Rule to an Alert](#).

Table 100: Conditions Field Descriptions

Close Parenthesis	Use the open and closed parentheses to group sets of rule conditions.
Literal Value	Enter a literal value to compare the object property against. For example, enter 1 to have the alert rule condition evaluate only objects with a priority (property) of 1. Literal values must match exactly the values your agency uses.
Logical Operator	If the alert rule uses more than one expression, Civic Platform displays a logical operator drop-down. Select the desired operator to combine the expressions. For more information about your choices, see Filtering the Display of Data .
Object	Select the object you want to associate with the trigger. For example, select Service Request if you plan to associate a service request's attribute with an alert. Civic Platform populates the Property drop-down field with values that correspond with the object you select.
Open Parenthesis	Use the open and closed parentheses to group rule conditions together.
Property	Select a property for the object you selected in the Object drop-down. For example, if you plan to apply this rule to an alert that notifies building supervisors of records opened on a specific date, select "Opened Date" from the Property drop-down list. Your agency admin defines the items in this drop-down list. For a list of properties, see Alert Rule Object Properties .
Relational Operator	Select a relational operator to compare the object property against. For more information about your choices, see Filtering the Display of Data .

Table 101: Alert Rule Object Properties

Property Name	Definition
after(hour)	Combine this property with others to create a time-lapse for the trigger. For example, to send an alert one hour after an item closes, set up an alert rule item for Status = "Closed," then use the AND operator to combine a second rule item for after(hour)="1."
Asset Group	Group to which an asset belongs.
Asset ID	Asset identification.
Asset Type	Type of asset.
Assigned Date	The date a staff member receives an item.
Assigned to Department	The department to which the item belongs.
Assigned to Staff	The agent to which the item belongs.
Channel Reported	The reporting mechanism for an item. For example, "Email," "Call Center," "Web."

Property Name	Definition
Class Type	Class type to which asset groups and types belong.
Closed By	The person who closed the item.
Closed Date	The date the user closed the item.
Current Value	An asset's current monetary value.
Date of Service	The date an asset record enters into the database.
Depreciation Amount	Dollar amount an asset has depreciated.
Depreciation Value	Value of an asset after it has depreciated.
End Closed Date	If you are searching for an object, use this field along with the Begin Closed Date to specify a range of closed dates.
End Open Date	If you are searching for an object, use this field along with the Begin Open Date to specify a range of open dates.
ID (SR, WO, and so forth)	The item's identification code. Civic Platform assigns the item this code at the time of its creation.
Last Activity Date	The date when the item most recently experienced activity.
Module Name	The module to which the object belongs. For example, "Service Request."
No Activity	This property enables you to specify a period, in hours, during which the item experienced no activity. For example, if you want the alert rule to trigger an event for items that experience no activity for 48 hours, select the "No Activity" property, the "=" operator, and enter "48" in the Literal Value field.
Opened Date	The date you opened the item.
Priority	The priority of the item. For example, "1" or "2." Your agency creates priorities in Civic Platform.
Record Status	Status, whether Active or Inactive, of an asset record.
Severity	The severity of the item. Your agency determines the values you can choose from.
SR Sub Type	A more specific classification for the item.
SR Type	The item's type or classification. Your agency determines the values you can choose from.
Staff Full Name	The full name of the staff member who owns the item.
Status	The status of the service item. Your agency determines the values you can choose from. You might see such statuses as Opened, Closed, or Unassigned.
Sub-Status	The sub-status of the item.
Useful Life	Number of years you expect to use an asset.

Sending a Message after Meeting Rule Conditions

You might want to send an alert to a citizen one hour after you close an item, to allow for a delay in case you reopen the item for some reason. You can also create time alerts that trigger if an event does not occur. For example, you can alert the manager of a department if items do not experience any activity, with the "No Activity" property.

To send an alert upon completion of rule conditions

1. Go to **Civic Platform Administration > Communication Manager > Alert Rule**

Civic Platform displays the Alert Rule window.

2. Click **New**.

Civic Platform displays a blank form in the record tab.

3. Complete the following fields:

- | | |
|-------------|---|
| Name | Enter the name of the alert rule. |
| Description | Enter a description of what the alert rule does. For example, you can describe the condition that initiates alert, such as "Service Request Closed," or describe the kind of alert rule, such as "Close Request Alert." |
| Enabled | Select "Yes" to enable the alert rule, making it available to apply to alerts; otherwise, select "No." Disabling rules enables you to deactivate them without deleting them from Civic Platform. |

4. Use the **Type** drop-down list to choose the **Time Alert** option.

5. Define the condition rule items:



Note:

This additional rule item specifies the time limit that Civic Platform waits before sending an alert message, upon completion of rule conditions.

- | | |
|-------------------|--|
| Open Parenthesis | Leave this field blank. |
| Object | Select the option for the desired item. For example, "Service Request," "Record," or "Inspection." Civic Platform populates the Property drop-down with the object's properties. |
| Property | Select the after (hour) menu option. |
| Operator | Select the equal (=) menu option. |
| Literal Value | Enter the time, in hours, after completion of alert rule conditions that you want Civic Platform to send the alert. You can use decimals to indicate fractions of an hour. For example, 0.25 equates to fifteen minutes, 0.50 equates to thirty minutes, and 0.75 equates to forty-five minutes. |
| Close Parenthesis | Leave this field blank. |
| Logical Operator | If you are creating a Time Alert, choose "And" from the drop-down list and add a condition with parameters. |

6. If you want to add an additional condition, click **New Item** and complete the fields explained in .

7. Click **Show Expression** to view the expression Civic Platform uses to evaluate the condition.

8. Click **Submit**.

Civic Platform adds the alert rule to the list and enables the Associated Objects tab.

To review a list of any associated objects, such as Alerts, click the **Associated Objects** tab. For instructions on applying an alert rule to an alert, see [Applying an Alert Rule to an Alert](#).

Editing an Alert Rule

When you edit an existing alert rule, you automatically affect objects, such as alerts, associated with the alert rule. You do not need to update associated items individually. For example, if you decide that you want to send alerts for a different service request type, you can simply edit the alert rule, and automatically update all alerts associated with the alert rule.

To edit an alert rule

1. Go to **Civic Platform Administration > Communication Manager > Alert Rule**

Civic Platform displays the Alert Rule window.

2. In the **Name** column, click the alert rule you want to edit.

Civic Platform displays the alert rule details in the record tab.

3. Update the alert rule conditions as appropriate.

For field descriptions, see [Creating an Alert Rule](#).

4. If you want to add an additional condition, click **New Item** and complete any fields that display. For field descriptions, see [Creating an Alert Rule](#).

For example, you might want to send an alert to a manager if someone creates an item of a certain type and of a particular priority. You enter each rule item in the same way, combining rule items with logical operators. Use the parenthesis to group two or more conditions.

5. If you want to delete a condition, select the condition and click **Delete Item**.

6. Click **Show Expression** if you want to view the expression used to evaluate the condition.

7. Click **Submit**.

Civic Platform adds the alert rule to the list and enables the Associated Objects tab.

8. To review a list of any associated objects, such as Alerts, click the **Associated Objects** tab.

For instructions on applying an alert rule to an object and disassociating an object from an alert rule, see [Working with Alert Rule Associations](#).

Deleting an Alert Rule

You can remove an alert rule from Civic Platform. Be sure to review any associated objects before deleting an alert rule.

To delete an alert rule

1. Go to **Civic Platform Administration > Communication Manager > Alert Rule**

Civic Platform displays the Alert Rule window.

2. Select each rule you want to remove.



Note:

Make sure the alert rule you select is the one you want to delete. If you remove the wrong Rule, you must recreate it.

3. Click Delete.

Civic Platform confirms the deletion and updates the alert rules list.

Working with Alert Rule Associations

After you establish an alert rule, you can associate it with the actual system response. For example, if an alert rule determines that Civic Platform should send an email message in response to a certain condition, you then need to identify what email message you want to send. You can subsequently review and make changes to the objects associated with an alert rule, which is useful if you are editing or removing an alert rule and need to know which alert objects currently use the alert rule.

Topics

- [Applying an Alert Rule to an Alert](#)
- [Disassociating an Alert Rule](#)

Applying an Alert Rule to an Alert

This section describes how you can apply rules to an alert. For instructions on establishing an alert rule, see [Creating an Alert Rule](#). For instructions on creating an alert, see [Creating an Alert](#).

To apply an alert rule to an alert

1. Go to Civic Platform Administration > Communication Manager > Alert Rule

Civic Platform displays the Alert Rule window.

2. Click the alert to which you want to apply the alert rule.

Civic Platform displays the alert details in the record portlet.

3. Click the Alert Rule tab.

Civic Platform displays the alert rules assigned to the alert.

The screenshot shows the 'Alert' screen in the Civic Platform Administration interface. At the top, there are buttons for 'Menu', 'New', 'Delete', and 'Help'. Below this is a table with columns: Message, Type, Duration, Duration Unit, and Alert ID. Two rows are visible: one for 'The publi...' (Emergency..., 0 days, Alert ID 841) and another for 'A new lic...' (Alert Mes..., 10 Days, Alert ID 1477). At the bottom of the table are buttons for 'Menu', 'Look Up', 'Delete', and 'Help'. Below the table, there are three tabs: 'Message', 'Recipient', and 'Alert Rule'. The 'Alert Rule' tab is selected. Under this tab, there is a smaller table with columns: Name, Description, Type, and Enabled. One row is visible: 'buil...' (Aler..., Yes). A scroll bar is visible on the right side of the window.

Message	Type	Duration	Duration Unit	Alert ID
The publi...	Emergency...	0		841
A new lic...	Alert Mes...	10	Days	1477

Name	Description	Type	Enabled
buil...		Aler...	Yes

4. Click Look Up to search for the alert rule you want to assign.

Civic Platform displays a list of all system rules.

5. Select the alert rule you want to apply.

6. Click **Select.**

Civic Platform adds the alert rule to the list of rules currently governing the alert.

7. If you inadvertently add the wrong alert rule, select the alert rule, then click **Delete. This disassociates the alert rule from the alert, but does not delete the alert rule from your system.**

Disassociating an Alert Rule

You create rule associations when you set up a particular system response, such as an alert. For instructions, see [Applying an Alert Rule to an Alert](#). If you have applied the same rule to multiple objects (alerts or other system responses), you might find it helpful to see a list of all objects associated with the same rule. You can disassociate an alert rule from one or more objects that use it, as appropriate.

To disassociate an alert rule

1. Go to **Civic Platform Administration > Communication Manager > Alert Rule**

Civic Platform displays the Alert Rule window.

2. Click the link for the alert rule whose associations you want to view or remove.

Civic Platform displays the alert rule details and associated objects.

3. Click the **Associated Objects tab.**

Civic Platform displays a list of objects currently associated with the alert rule.

The screenshot shows the 'Alert Rule' window with the 'Associated Objects' tab selected. The top navigation bar includes 'Administration', 'Alert Rule', 'Menu', 'New', 'Delete', and 'Help'. Below the navigation is a table with columns: Name, Description, Type, and Enabled. A single row is selected, showing 'buil...' as the name, 'Aler...' as the type, and 'Yes' as the enabled status. At the bottom of the table are 'Menu', 'Delete', and 'Help' buttons. Below the table are two tabs: 'Details' (selected) and 'Associated Objects'. The 'Associated Objects' section contains a table with columns: Message, Type, Duration, Duration Unit, and Alert ID. Two rows are listed: 'The publi...' (Emergency..., 0, Days, 841) and 'A new lic...' (Alert Mes..., 10, Days, 1477). Each row has a checkbox next to it.

4. Select the object you want to delete.

5. Click **Delete.**

Civic Platform removes the association.

Announcements

Topics

- [Creating Announcements](#)
- [Searching for an Announcement](#)
- [Editing an Announcement](#)
- [Deleting an Announcement](#)
- [Managing Announcement Recipients](#)

Creating Announcements

Privileged users can create and post announcements to notify agency users or public users of all kinds of events. For example, you can announce a change in your agency's policies, a new employee of the month, or advise users of a software maintenance window.

You can configure an announcement to display in either Civic Platform, Citizen Access, or both. In Civic Platform, the announcement displays in the Bulletin Board portlet to the recipients (see [Figure 31: Accessing the Announcement in Civic Platform](#)). In Citizen Access, when the recipients click the Announcement link on the top of the home page, a window displays under the link with the announcement (see [Figure 32: Accessing the Announcement in Citizen Access](#)).



Note:

For the Announcement link to display in the Citizen Access home page, you must configure the announcement settings in Citizen Access Admin. For more information, see "Announcement Settings" in the Citizen Access Administrator Guide.

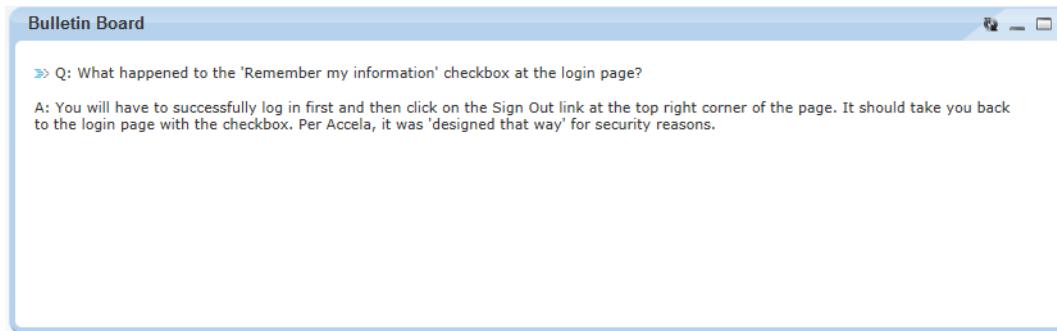


Figure 31: Accessing the Announcement in Civic Platform

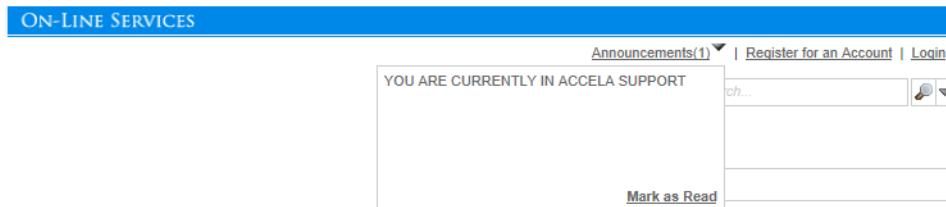


Figure 32: Accessing the Announcement in Citizen Access

To create an announcement

1. Go to **Civic Platform Administration > Communication Manager > Announcement**.
2. Click **New**.
Civic Platform displays a blank form.

3. Complete any fields that display.

For a list of field descriptions, see [Table 102: Field Reference for Announcement Details](#).

4. Click **Submit** to save the announcement.

Civic Platform displays a confirmation and enables the Recipient tab.

5. Click the Recipient tab and specify the audience for your announcement. For instructions, see [Managing Announcement Recipients](#).

Table 102: Field Reference for Announcement Details

Message Title	Enter a title.
Message Type	Choose a message type.
Content	Enter the text (content) of the announcement. You can enter variables in this field.
Display Message In	Choose where you want to display the announcement: Citizen Access Only Only public users in Citizen Access can see the announcement. Civic Platform only Only agency users in Civic Platform can see the announcement. Both Expose the announcement to both public users in Citizen Access and agency users in Civic Platform. Note: You can continue to specify who can access the announcement. For complete details, see Managing Announcement Recipients .
Date (Start)	Click the calendar icon to select the date when the announcement should first appear. You can continue to specify the time in the Time (Start) field that the announcement begins to appear.
Time (Start)	Specify the time that the announcement begins to appear.
Date (End)	Click the calendar icon to select the last date that the announcement should appear. You can use the Time (End) to continue to specify the time that the announcement should begin to disappear. After the specified time, the announcement no longer displays in the Bulletin Board portlet.
Time (End)	Specify the time that the announcement begins to disappear.
Status	Choose “Enable” to make the announcement available for distribution. Otherwise, choose “Disable.”

Searching for an Announcement

You can search for an announcement and edit it.

To search for an announcement

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).

2. Choose Communication Manager > Announcement.

3. Click **Search**.

Civic Platform displays the search form.

4. Complete any fields that display.

For a list of field descriptions, see [Table 102: Field Reference for Announcement Details](#).

5. Click **Submit**.

Civic Platform returns a list of announcements that match your search criteria.

Editing an Announcement

This section describes how you can modify an existing announcement.

To edit an announcement

1. Access the Setup portlet ([Navigating to the Setup Portlet](#)).

2. Choose Communication Manager > Announcement.

3. Click the link to the announcement you want to edit.

If you need to search for the announcement, click **Search**.

Civic Platform displays the announcement details.

4. Update any of the fields that display.

For a list of field descriptions, see [Table 102: Field Reference for Announcement Details](#).

5. Click **Submit** to save the announcement.

Civic Platform displays a confirmation and updates the announcement list.

6. Change the announcement recipients, as appropriate.

For instructions, see [Managing Announcement Recipients](#).

Deleting an Announcement

When an announcement becomes outdated, you can delete it from your system.

To delete an announcement

1. Go to **Civic Platform Administration > Communication Manager > Announcement**.
2. Select the announcement you want to delete.
3. Click **Delete**.

Civic Platform displays a confirmation and updates the announcements list.

Managing Announcement Recipients

After creating an announcement and choosing which users you want to expose the announcement to, you must determine who should receive the announcement in the Recipient tab of the Announcement portlet. If you want to post the announcement to your agency users, you can select entire agency or select certain department, user group, or even individual users within your agency. If you want to post the announcement to public users, you can select one or more agencies, or select certain public user groups including anonymous users, registered users, licensed professionals, authorized agents, and authorized agent clerks.

If a group or individual in your organizational structure or Citizen Access no longer needs to receive an announcement, you can remove the group or individual from the list of recipients. Removing a recipient from this list does not delete the recipient from your system.

For more information on managing announcement recipients, see [Setting Up Security Policies](#).

Notification Templates

Topics

- [Working with Notification Templates](#)
- [Embedding Links to Record Detail Page](#)
- [Searching for Notification Template](#)
- [Editing a Notification Template](#)
- [Deleting a Notification Template](#)

Working with Notification Templates

Notification templates are emails, text messages, meeting requests, and Citizen Access announcements, that Civic Platform sends to public users upon a triggering event or action.

Accela provides stock, pre-defined system-level templates, available out of the box with Civic Platform. Administrators can create new notification templates, and can customize:

- The content of the message

- Which notification type (email or text message) Civic Platform sends when an action occurs that triggers communication
- Delayed sending options

You can add parameters to the subject and body of the message. You must declare and assign parameter values in the EMSE scripts. When the specified event or a batch job occurs, the email notification generates and the parameters populate with the matching value passed from the scripts. Parameters are not case-sensitive, but you must enclose them in a pair of double-dollar signs “\$\$” for example, \$ \$ExaminationID\$\$. Refer to [Embedding Links to Record Detail Page](#) for more details.

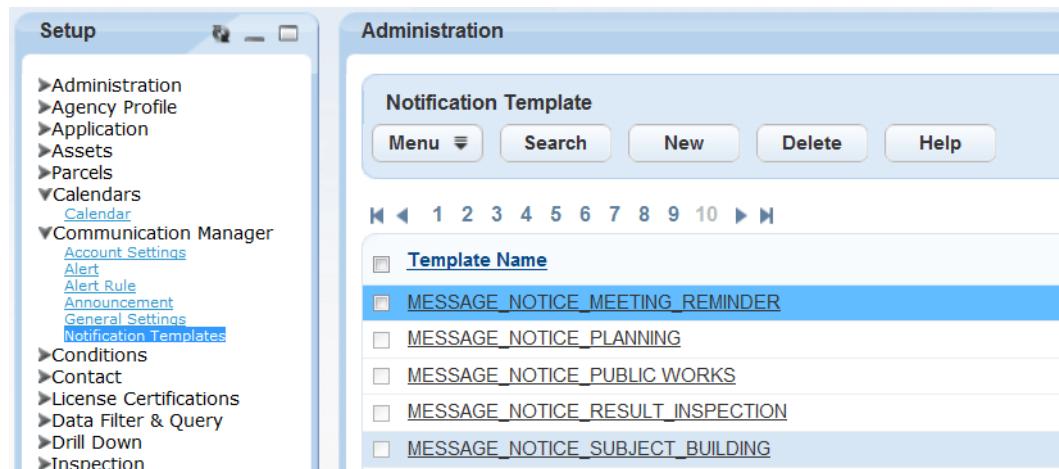
Viewing the Notification Template List

The notification template list includes custom notification templates, created by administrators for Civic Platform and Citizen Access. The notification template list also includes pre-defined system-level templates, available out of the box, which administrators can customize to suit the agency's business objectives.

To view the notification template list

1. Go to Civic Platform Administration > Communication Manager > Notification Templates.

Civic Platform displays the Notification Templates window.



System-level Notification Templates

The following is a complete list of system-level Notification Templates available in communication manager. This includes both Civic Platform Notification Templates and Citizen Access Email Notifications, formerly accessible in Citizen Access Admin > Email Settings.

Table 103: System-level Notification Templates

AA_MESSAGE_INSPECTION_STATUS_CHANGE
AA_MESSAGE_THRESHOLD_NOTIFICATION
ACA_ACTIVATION_MESSAGE
ACA_AGENCY_ACTIVATION_MESSAGE
ACA_MESSAGE_ACCOUNT_VERIFICATION_BY_HYPERLINK
ACA_MESSAGE_ADD_NEW_LICENSE_NOTICE_AGENCY
ACA_MESSAGE_ADD_NEW_LICENSE_NOTICE_CITIZEN
ACA_MESSAGE_ASSOCIATING_LICENSE_TO_MULTIPLE_ACCOUNTS

ACA_MESSAGE_ETISALAT_PAYMENT_COMPLETION_FAILED
ACA_MESSAGE_ETISALAT_PAYMENT_COMPLETION_SUCCEEDED
ACA_MESSAGE_ETISALAT_PAYMENT_RECONCILIATION_RESULT
ACA_MESSAGE_ETISALAT_PAYMENT_RECONCILIATION_UPLOAD
ACA_MESSAGE_ETISALAT_PAYMENT_REGISTRATION_SUCCEEDED
ACA_MESSAGE_INSPECTION_STATUS_CHANGE
ACA_MESSAGE_RENEW_LICENSE_AUTO_ISSUANCE
ACA_MESSAGE_RENEW_LICENSE_NEW_APPLICATION_NOTICE_AGENCY
ACA_MESSAGE_RENEW_LICENSE_NO_AUTO_ISSUANCE_APPROVED
ACA_MESSAGE_RENEW_LICENSE_NO_AUTO_ISSUANCE_DENIED
ACA_MESSAGE_RENEW_LICENSE_NO_AUTO_ISSUANCE_PENDING
ACA_MESSAGE_SCORES_UPDATE_NOTICE_AGENCY
ACA_MESSAGE_SCORES_UPDATE_NOTICE_PROVIDER
ACA_MESSAGE_SENPASSWORD
ACA_INACTIVATION_MESSAGE
ACTIVATION_MESSAGE
MESSAGE ACA_CONNECT_LICENSE_APPROVE_OWNER
MESSAGE ACA_CONNECT_LICENSE_APPROVE_USER
MESSAGE ACA_CONNECT_LICENSE_CONNECT_OWNER
MESSAGE ACA_CONNECT_LICENSE_CONNECT_USER
MESSAGE ACA_CONNECT_LICENSE_DISCONNECT_OWNER
MESSAGE ACA_CONNECT_LICENSE_DISCONNECT_USER
MESSAGE ACA_CONNECT_LICENSE_REJECT_OWNER
MESSAGE ACA_CONNECT_LICENSE_REJECT_USER
MESSAGE ACA_TRADE_NAME_APPROVED
MESSAGE AUTOMATED_PLANREVIEW
MESSAGE NOTICE BUILDING
MESSAGE NOTICE ENFORCEMENT
MESSAGE NOTICE FIRE
MESSAGE NOTICE PLANNING
MESSAGE NOTICE PUBLIC WORKS
MESSAGE NOTICE LICENSE EXPIRED
MESSAGE NOTICE RESULT INSPECTION
MESSAGE PAYMENT_NOTICE_BUILDING
MESSAGE PAYMENT_NOTICE_LICENSES
MESSAGE PAYMENT_NOTICE_PERMITS
MESSAGE PAYMENT RECEIPT BUILDING
MESSAGE PAYMENT RECEIPT LICENSES
MESSAGE PAYMENT RECEIPT PERMITS
MESSAGE RECEIPT BUILDING

MESSAGE_RECEIPT_ENFORCEMENT

MESSAGE_RECEIPT_FIRE

MESSAGE_RECEIPT_PLANNING

MESSAGE_RECEIPT_PUBLIC WORKS

MESSAGE_REPORT

MESSAGE_SEND_PASSWORD

ACA_MESSAGE_ACCOUNT_LOCKED_NOTICE_CITIZEN

ACA_MESSAGE ACA_PROXYUSER_ADD

MESSAGE_NOTICE_MEETING_Reminder

Creating Notification Templates

Use the procedure below to create templates for outgoing emails, meeting requests, SMS text messages, and Citizen Access notification emails.

To create notification templates

1. Go to **Civic Platform Administration > Communication Manager > Notification Templates**.

Civic Platform displays the Notification Templates window.

2. Click **New**.

3. Click the General Details tab.

Civic Platform displays the General Details window.

The screenshot shows the 'General Details' tab selected in a window titled 'Notification Template: MY_NOTIFICATION_TEMPLATE'. The window includes standard buttons like 'Menu', 'Save', 'Reset', and 'Help'. The 'General Details' tab is active, showing fields for 'Template Name' (set to 'MY_NOTIFICATION_TEMPLATE'), 'Delay Time' (empty), and 'Delay Unit' (set to 'Minutes'). Below these are fields for 'Description' (empty) and a 'check spelling' link.

4. Complete these fields:

Table 104: Communication Manager, Notification Template, General Details Tab

Template Name	Enter a name for the template.
Description	Enter a description of the template's purpose.
Delay Time and Delay Unit	<p>Enter the number of minutes, hours, or days you want to delay sending the message and choose a time interval (minutes, hours, or days) in the Delay Unit field.</p> <p>For example, if you want to send inspection results after 14 days, enter a delay time of 14, and then specify "days" as the delay unit in the next field.</p>

5. If the notification is for email distribution, click the Email Content tab. If the notification is for text message distribution, proceed to .

Civic Platform displays the Email Content window.

The screenshot shows the 'Email Content' tab of the Communication Manager. At the top, there are three tabs: 'General Details', 'E-mail Content' (which is selected), and 'SMS Content'. Below the tabs are fields for 'From' (a dropdown menu showing '-Select-'), 'To' (a text input field), 'Cc' (a text input field), 'Bcc' (a text input field), 'Title' (a text input field), and 'Importance' (a dropdown menu showing 'Normal'). A rich text editor toolbar is below these fields. At the bottom of the window, there are several checkboxes: 'check spelling', 'Display in ACA', 'Display as Alert', and 'Save as Attachment'. There are also dropdown menus for 'Attach To' (set to 'Record'), 'Document Group' (set to '-Select-'), 'Document Category' (set to '-Select-'), and 'EDMS Name' (set to '-Select-').

6. Complete these fields:

Table 105: Communication Manager, Notification Template, Email Content Tab

From	Choose a “from” value indicating who the email is from. This name displays to the message recipient. Administrators configure the values that display here when setting up the email account; see Configuring Account Settings .
To, Cc, and Bcc	<p>Enter specific email addresses or enter EMSE parameters such as \$\$contacts\$\$ or \$recordcontactemail\$. You must define these values in the EMSE scripts that initiate the communication.</p> <p>In the Cc and Bcc fields, you can enter an agency email address, which is useful for saving all communications sent to or from a particular department-wide email alias that you set up to retrieve all emails from the server.</p> <p>Another use case is to configure a script that attaches all emails sent to a Cc or Bcc to records in Civic Platform.</p>
Title	Enter an email subject or enter an EMSE parameter. To use parameters you must define the values in the EMSE scripts that initiate the communication. For complete details about working with EMSE, refer to the <i>Accela Civic Platform Scripting Guide</i> .
Importance	Select an importance: low, normal, or high. Normal is the default.

Content	<p>Enter the content of the message. In addition to standard message text, you can:</p> <ul style="list-style-type: none"> -- Include variables in the message body. Refer to Variables for a full list. -- Use HTML code to format the content. -- Add parameters and embed a hyperlink to the Record Detail page in the message body. You must define the parameters and URL in EMSE scripts. <p>For information on how to define parameter and embed a hyperlink, see Embedding Links to Record Detail Page.</p>
Display in ACA	Only templates related to examinations and EDR (Electronic Document Recognition) have the Display in ACA field. Select this option to display the notification as an announcement in Citizen Access. For complete details on how to set up Announcements, refer to the Citizen Access Administrator Guide, “Global Settings Configuration” section.
Display as Alert	Select this option to display an alert informing agency users that they successfully configured the communication.
Save as Attachment	Select this option to enable the attachments settings that define whether and how Civic Platform attaches notifications to records or email recipients.
Attach To	<p>This setting is only available for system-level templates, and becomes available when you select the Save as Attachment option.</p> <p>Select Record in the drop-down list to save the email notification as an attachment to associated records.</p> <p>Select Recipient in the drop-down list, Civic Platform saves a notification as an attachment to the recipients of the notification under the following conditions:</p> <ol style="list-style-type: none"> (1) The event that triggers when Civic Platform sends the notification contains script that calls the EMSE method attachEmailToEntity to attach the email to specific recipient(s); (2) The recipient email address specified in the email content is identical with one of the record-associated contacts or licensed professionals.
Document Group/Category	This setting is only available for system-level templates, and becomes available when you select the Save as Attachment option. Categorize the attachment by first selecting a value from the Document Group drop-down list, then a value from the Document Category drop-down list. It is important to select the Document Group first, because the Document Category drop-down list can be different based on which document group you choose.
EDMS Name	This setting is only available for system-level templates, and becomes available when you select the Save as Attachment option. Select the Electronic Document Management System (EDMS) you want to save the notification to.

7. Click **Save**.

8. If the message is for text message distribution, click the SMS Content tab.

Civic Platform displays the SMS Content window.

The screenshot shows the 'SMS Content' tab of a communication template. At the top, there are three tabs: 'General Details', 'E-mail Content', and 'SMS Content'. The 'SMS Content' tab is active. Below the tabs, there are three main sections: 'From' (with a dropdown menu showing '--Select--'), 'To' (with a text input field containing a placeholder), and 'Content' (with a text area containing 'No content.' and a vertical scroll bar). At the bottom of the content area, there is a blue link labeled 'check spelling'.

9. Complete these fields:

Table 106: Communication Manager, Notification Template, SMS Content Tab

From	Choose a “from” value indicating who the text message is from. This name displays to the message recipient. Administrators configure the values that display here when setting up the email account; see Configuring Account Settings .
To	Enter cellular phone number(s). You can also enter parameters such as \$\$contacts\$\$. You must define these values in the EMSE scripts that initiate the communication.
Content	Enter the content of the text message. This should be a very brief message and can include agency-defined variables, such as record ID, workflow task name and due date, and scheduled inspection time, for example.

10. Click Save.

Embedding Links to Record Detail Page

You can embed a hyperlink to the Record Detail page in notification templates. Embedding links enables public users to instantly access the Record Detail page by clicking the hyperlink from the notification. If you restrict record detail page access to registered users, the Login screen displays before the record detail page.

To embed a hyperlink in a notification template to link to the Record Detail page there are four steps:

- [Creating an EMSE script](#)
- [Defining a parameter to assign to returned URL](#)
- [Entering parameter to the template body](#)
- [Mapping the parameter to Record Detail page](#)

For complete details about working with scripts, refer to the *Accela Civic Platform Scripting Guide*.

Creating an EMSE script

Step 1: Create an EMSE script, in which you create a function to get the Record Detail page URL

The URL returned by the function must be in the pattern as shown below:

`http://$$ACAWebSite$$/urlrouting.ashx?type=1000&Module=$$Module$$&capID1=$$CapID1$$&capID2=$$CapID2$$&capID3=$$CapID3$$&agencyCode=$$AgencyCode$$`

<code>\$\$ACAWebSite\$\$</code>	Citizen Access website domain.
<code>\$\$Module\$\$</code>	Module to which you associated the records.
<code>\$\$CapID1\$\$, \$\$CapID2\$\$, \$\$CapID3\$\$</code>	Record ID fields together with the <code>\$\$Module\$\$</code> and <code>\$\$AgencyCode\$\$</code> to identify a unique record in your agency.
<code>\$\$AgencyCode\$\$</code>	Agency code.

The following code snippet is an example of a function returning the URL of the Record Detail page.

```
function getACAUUrl()
{
    var acaUrl = "";

    var id1 = Accela Automation.env.getValue("PermitId1");

    var id2 = Accela Automation.env.getValue("PermitId2");

    var id3 = Accela Automation.env.getValue("PermitId3");

    var capResult = Accela Automation.cap.getCap(id1, id2, id3);

    if(!capResult.getSuccess())
    {
        return acaUrl;
    }

    var cap = capResult.getOutput().getCapModel();

    acaUrl = acaWebServiceSite + "/urlrouting.ashx?type=1000";

    acaUrl += "&Module=" + cap.getModuleName();

    acaUrl += "&capID1=" + id1 + "&capID2=" + id2 + "&capID3=" + id3;

    acaUrl += "&agencyCode=" + Accela Automation.getServiceProviderCode();

    return acaUrl;
}
```

Defining a parameter to assign to returned URL

Step 2: In the EMSE script, define a parameter to assign to the returned URL.

The sample code below defines a parameter called `$$Url$$`. Civic Platform assigns the returned URL by function `getACAUUrl()`.

```

function getParamsForSchedule()
{
    ...
    //Define the parameter
    $$Url$$
    to assign to the Record Detail page URL.

    addParameter(params, $$Url$$, getACAUUrl());
    ...
    return params;
}

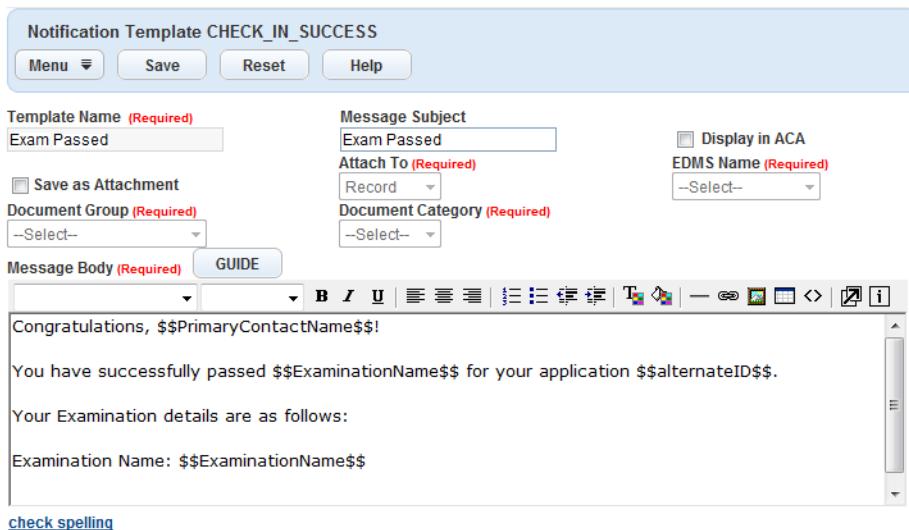
```

Entering parameter to the template body

Step 3: Enter text or parameter to the template body that you want to map to the Record Detail page URL.

You can map the URL either to the text or to the parameter in the template body. For each parameter that you add to the template body or its subject, you must assign and define its value in the EMSE scripts. For the sample code of defining parameters, see [Defining a parameter to assign to returned URL](#)

1. Access the Notification Template portlet ([Navigating to the Setup Portlet](#)).
2. Open an existing notification template, or create a new one.
To learn how to create a notification template, see [Creating Notification Templates](#).
3. In the Message Body field, do one of the following:
 - Enter the text you want to map to the URL of the Record Detail page. For example, *Click Here*.
 - Enter a parameter you want to map to the URL. For example, `$$AlternateID$$`.



Mapping the parameter to Record Detail page

Step 4: Map the text or parameter to the Record Detail page URL.

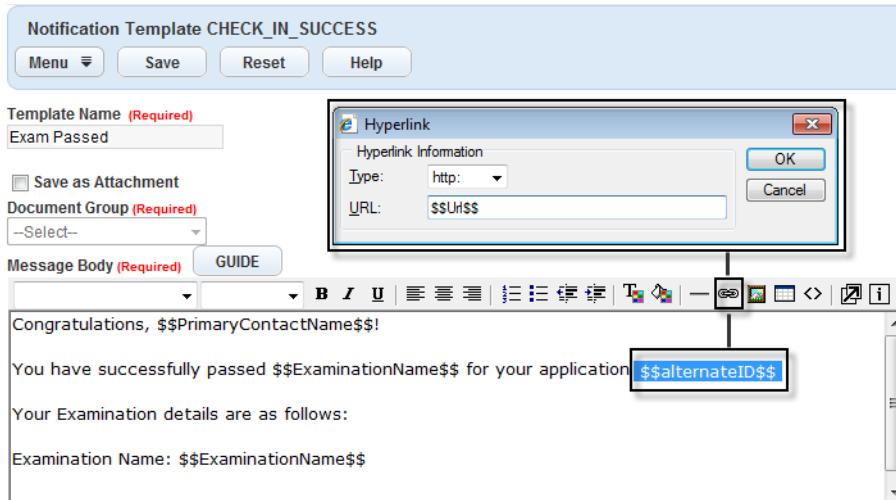
1. Access the template body.

To learn how to access a notification template, see [Entering parameter to the template body](#)

2. Highlight the text or the parameter in the Message Body field.

3. Click the hyperlink icon.

Civic Platform displays the Hyperlink window.



4. In the Hyperlink window, select “https” from the **Type** drop-down list.
5. In the URL field enter the parameter you want to assign to the returned URL in the EMSE scripts (\$\$Url\$\$, from the sample code snippet in [Defining a parameter to assign to returned URL](#)).
6. Click **Save** if you are editing an existing template; click **Submit** if you are creating a new template.

Searching for Notification Template

To search for a notification template

1. Go to **Civic Platform Administration > Communication Manager > Notification Templates**.

Civic Platform displays the Notification Templates window.

2. Click **Search**.

Civic Platform displays the Notification Template Search form.

3. Complete any fields that display.

4. Click **Submit**.

Civic Platform returns a list of notification templates that match your search criteria.

Editing a Notification Template

To edit a notification template

1. Go to **Civic Platform Administration > Communication Manager > Notification Templates**.

Civic Platform displays the Notification Templates window.

2. Click the template name that you want to edit.
If you need to search for the message, Click **Search** on the top of the list.
Civic Platform displays the template detail portlet.
3. Update any of the fields that display as necessary.
For descriptions of the fields, see [Creating Notification Templates](#).
4. Click **Submit**.

Deleting a Notification Template

When a notification template becomes outdated, you can delete it from your system. If a batch job uses the deleted notification template, you cannot delete the template. You also cannot delete system templates that come standard with the Accela solutions.

To delete a notification template

1. Go to **Civic Platform Administration > Communication Manager > Notification Templates**.
Civic Platform displays the Notification Templates window.
2. Select the unwanted templates.
3. Click **Delete**.
Civic Platform warns you that the template might be in use.
4. Click **OK** if you are sure you want to delete the template.

Variables

The following table lists the variables you can use when you compose system-generated emails, SMS text messages, and notification templates.

Table 107: Communication Variables

Notification Template or Product Area	Variable	Description
AA_MESSAGE_INSPECTION_STATUS_CHANGE	\$\$InspectorFullName\$\$	Inspector full name
	\$\$CustomId\$\$	Customer ID
	\$\$PermitId1\$\$	Permit ID1
	\$\$PermitId2\$\$	Permit ID2
	\$\$PermitId3\$\$	Permit ID3
	\$\$InspectionType\$\$	Inspection type
	\$\$InspectionStatus\$\$	Inspection status
	\$\$InspectionDate\$\$	Inspection date
	\$\$InspectionTime\$\$	Inspection time
	\$\$InspectionAddress\$\$	Inspection address
	\$\$RequestedComments\$\$	Requested comments
	\$\$InspectionEndTime\$\$	Inspection end time
AA_MESSAGE_THRESHOLD_NOTIFICATION	\$\$CapID\$\$	Record ID

Notification Template or Product Area	Variable	Description
	\$\$AltID\$\$	Alt ID
	\$\$AccountID\$\$	Trust account ID
	\$\$ThresholdAmount\$\$	Trust account threshold amount
	\$\$Balance\$\$	Balance
	\$\$Description\$\$	Trust account description
	\$\$LegerAccount\$\$	Leger account
ACA_ACTIVATION_MESSAGE	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name
	\$\$password\$\$	Public user's password
	\$\$email\$\$	Public user's email address
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$middleName\$\$	For more information, see Setting an Associated Contact as the Account Owner .
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
ACA_AGENCY_ACTIVATION_MESSAGE	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name
	\$\$password\$\$	Public user's password
	\$\$email\$\$	Public user's email address
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$middleName\$\$	For more information, see Setting an Associated Contact as the Account Owner .
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
ACA_INACTIVATION_MESSAGE	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name

Notification Template or Product Area	Variable	Description
ACA_MESSAGE_ACCOUNT_LOCKED_NOTICE_CITIZEN	\$\$email\$\$	Public user's email address
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$middleName\$\$	For more information, see Setting an Associated Contact as the Account Owner .
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
ACA_MESSAGE_ACAPROXYUSER_ADD	\$\$InputName\$\$	Proxy user's nickname
	\$\$InviterName\$\$	Public user name
	\$\$PersonalNote\$\$	Proxy user's invitation message
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$middleName\$\$	For more information, see Setting an Associated Contact as the Account Owner .
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
ACA_MESSAGE_ACCOUNT_LOCKED_NOTICE_CITIZEN	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name
	\$\$password\$\$	Public user's password
	\$\$email\$\$	Public user's email address
	\$\$UUID\$\$	UUID (configure in the hyperlink within the account activation email).

Notification Template or Product Area	Variable	Description
ACA_MESSAGE_ACCOUNT_VERIFICATION_BY_HYPERLINK	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account. For more information, see Setting an Associated Contact as the Account Owner .
	\$\$middleName\$\$	
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
ACA_MESSAGE_ADD_NEW_LICENSE_NOTICE_AGENCY	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name
	\$\$password\$\$	Public user's password
	\$\$email\$\$	Public user's email address
	\$\$UUID\$\$	UUID (configure in the hyperlink within the account activation email).
ACA_MESSAGE_ACCOUNT_VERIFICATION_BY_HYPERLINK	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account. For more information, see Setting an Associated Contact as the Account Owner .
	\$\$middleName\$\$	
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
ACA_MESSAGE_ADD_NEW_LICENSE_NOTICE_AGENCY	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name
	\$\$email\$\$	Public user's email address
	\$\$LicenseNumber\$\$	License number
	\$\$LicenseType\$\$	License type
	\$\$mmddyy\$\$	Current date

Notification Template or Product Area	Variable	Description
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account. For more information, see Setting an Associated Contact as the Account Owner .
	\$\$middleName\$\$	
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
ACA_MESSAGE_ADD_NEW_LICENSE_NOTICE_CITIZEN	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name
	\$\$email\$\$	Public user's email address
	\$\$LicenseNumber\$\$	License number
	\$\$LicenseType\$\$	License type
	\$\$mmddyy\$\$	Current date
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account. For more information, see Setting an Associated Contact as the Account Owner .
	\$\$middleName\$\$	
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
ACA_MESSAGE_ASSOCIATING_LICENSE_TO_MULTIPLE_ACCOUNTS	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name
	\$\$email\$\$	Public user's email address
	\$\$LicenseNumber\$\$	License number
	\$\$LicenseType\$\$	License type
	\$\$mmddyy\$\$	Current date

Notification Template or Product Area	Variable	Description
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account. For more information, see Setting an Associated Contact as the Account Owner .
	\$\$middleName\$\$	
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
ACA_MESSAGE_INSPECTION_STATUS_CHANGE	\$\$InspectorFullName\$\$	Inspector full name
	\$\$CustomId\$\$	Customer ID
	\$\$PermitId1\$\$	Permit ID1
	\$\$PermitId2\$\$	Permit ID2
	\$\$PermitId3\$\$	Permit ID3
	\$\$InspectionType\$\$	Inspection type
	\$\$InspectionStatus\$\$	Inspection status
	\$\$InspectionDate\$\$	Inspection date
	\$\$InspectionTime\$\$	Inspection time
	\$\$InspectionAddress\$\$	Inspection address
	\$\$RequestedComments\$\$	Requested comments
ACA_MESSAGE_RENEW_LICENSE_AUTO_ISSUANCE	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name
	\$\$email\$\$	Public user's email address
	\$\$capID\$\$	Record ID
	\$\$capType\$\$	Record type alias
	\$\$mmddyy\$\$	License expiration date
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account. For more information, see Setting an Associated Contact as the Account Owner .
	\$\$middleName\$\$	
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
ACA_MESSAGE_RENEW_LICENSE_NEW_APPLICATION_NOTICE_AGENCY	\$\$userID\$\$	Public user ID

Notification Template or Product Area	Variable	Description
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name
	\$\$email\$\$	Public user's email address
	\$\$capID\$\$	Record ID
	\$\$capType\$\$	Record type alias
	\$\$mmddyy\$\$	License expiration date
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$middleName\$\$	For more information, see Setting an Associated Contact as the Account Owner .
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
ACA_MESSAGE_RENEW_LICENSE_NO_AUTO_ISSUANCE_APPROVED	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name
	\$\$email\$\$	Public user's email address
	\$\$capID\$\$	Record ID
	\$\$capType\$\$	Record type alias
	\$\$mmddyy\$\$	License expiration date
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$middleName\$\$	For more information, see Setting an Associated Contact as the Account Owner .
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
ACA_MESSAGE_RENEW_LICENSE_NO_AUTO_ISSUANCE_DENIED	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name
	\$\$email\$\$	Public user's email address
	\$\$capID\$\$	Record ID

Notification Template or Product Area	Variable	Description
	\$\$capType\$\$	Record type alias
	\$\$mmddyy\$\$	License expiration date
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$middleName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$lastName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$businessName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$state\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$city\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$address\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$zip\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
ACA_MESSAGE_RENEW_LICENSE_NO_AUTO_ISSUANCE_PENDING	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name
	\$\$email\$\$	Public user's email address
	\$\$capID\$\$	Record ID
	\$\$capType\$\$	Record type alias
	\$\$mmddyy\$\$	License expiration date
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$middleName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$lastName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$businessName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$state\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$city\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$address\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$zip\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
ACA_MESSAGE_SCORES_UPDATE_NOTICE_AGENCY	\$\$servProvCode\$\$	[Case sensitive] Agency ID; Service Provider Code
	\$\$ProviderName\$\$	[Case sensitive] Provider name
	\$\$ProviderNumber\$\$	[Case sensitive] Provider number
ACA_MESSAGE_SCORES_UPDATE_NOTICE_PROVIDER	\$\$servProvCode\$\$	[Case sensitive] Agency ID; Service Provider Code
	\$\$ProviderName\$\$	[Case sensitive] Provider name
	\$\$ProviderNumber\$\$	[Case sensitive] Provider number
ACA_MESSAGE_SENPASSWORD	\$\$userID\$\$	Public user ID

Notification Template or Product Area	Variable	Description
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user's display name
	\$\$password\$\$	Public user's password
	\$\$email\$\$	Public user's email address
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$middleName\$\$	For more information, see Setting an Associated Contact as the Account Owner .
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
EMAIL_NOTICE_MEETING_Reminder	\$\$Meeting.Type\$\$	Meeting type
	\$\$Meeting.RespDept\$\$	Meeting responsible person's department
	\$\$Meeting.RespName\$\$	Meeting responsible person name
	\$\$Meeting.Date\$\$	Meeting date
	\$\$Meeting.Location\$\$	Meeting location
	\$\$Meeting.StartTime\$\$	Meeting start time
	\$\$Meeting.EndTime\$\$	Meeting end time
	\$\$Meeting.IsAllDayEvent\$\$	All day event
	\$\$Meeting.Subject\$\$	Meeting subject
	\$\$Meeting.Attendee\$\$	Meeting attendee
	\$\$Meeting.Body\$\$	Meeting body
	\$\$Meeting.Comment\$\$	Meeting comment
	\$\$Meeting.MaxItem\$\$	Maximum agenda items
	\$\$Meeting.Agenda\$\$	Meeting agenda ID
	\$\$Meeting.Duration\$\$	Meeting duration
	\$\$Meeting.NoticeDate\$\$	Meeting notice date
	\$\$Meeting.Status\$\$	Meeting status
Hearing Email Notification, defined in Classic Administration > Workflow > Messages	\$PRIMARYAPPLICANT\$	Primary applicant
	\$AGENCY-DEPARTMENT\$	Agency department
	\$HEARING_BODY\$	Hearing body
	\$CALENDARDATEORIG\$	Original calendar date
	\$LOCATIONORIG\$	Original location
	\$STARTTIMEORIG\$	Original start time
	\$CALENDARDATENEW\$	New calendar date

Notification Template or Product Area	Variable	Description
	\$LOCATIONNEW\$	New location
	\$STARTTIMENEW\$	New start time
	\$FIRSTNAME\$	Agency's first name
	\$LASTNAME\$	Agency's last name
	\$USERTITLE\$	User name
Inspection Email Notification, defined in Classic Administration > Workflow > Messages	\$\$CAPID\$\$ / \$PERMITID\$	Record or permit ID
	\$\$CAPDETAIL\$\$ / \$PERMITDETAIL\$	Record or permit detail
	\$\$CAPAPPTYPE\$\$ / \$PERMITAPPTYP\$	Record or permit type
	\$\$CAPNAME\$\$ / \$PERMITNAME\$	Record or permit name
	\$\$CAPSTATUS\$\$ / \$PERMITSTATUS\$	Record or permit status value
	\$\$CAPADDR\$\$ / \$PERMITADDR\$	Record or permit address
	\$\$CAPPARCEL\$\$ / \$PERMITPARCEL\$	Record or permit parcel
	\$\$CAPWRKDESC\$\$ / \$PERMITWRKDESC\$	Record or permit work description
	\$\$INSPITEM\$\$ / \$INSPITEM\$	Inspection item
	\$\$INSPRESULT\$\$ / \$INSPRESULT\$	Inspection result
	\$\$INSPCOMMENT\$\$ / \$INSPCOMMENT\$	Inspection comment
MEETING_NEW	\$\$Meeting.Type\$\$	Meeting type
	\$\$Meeting.RespDept\$\$	Meeting responsible person department
	\$\$Meeting.RespName\$\$	Meeting responsible person name
	\$\$Meeting.Date\$\$	Meeting date
	\$\$Meeting.Location\$\$	Meeting location
	\$\$Meeting.StartTime\$\$	Meeting start time
	\$\$Meeting.EndTime\$\$	Meeting end time
	\$\$Meeting.IsAllDayEvent\$\$	All day event
	\$\$Meeting.Subject\$\$	Meeting subject
	\$\$Meeting.Attendee\$\$	Meeting attendee
	\$\$Meeting.Body\$\$	Meeting body
	\$\$Meeting.Comment\$\$	Meeting comment
	\$\$Meeting.MaxItem\$\$	Maximum agenda items
	\$\$Meeting.Agenda\$\$	Meeting agenda ID
	\$\$Meeting.Duration\$\$	Meeting duration
	\$\$Meeting.NoticeDate\$\$	Meeting notice date
	\$\$Meeting.Status\$\$	Meeting status
MEETING_REJECT	\$\$Meeting.Type\$\$	Meeting type
	\$\$Meeting.RespDept\$\$	Meeting responsible person's department
	\$\$Meeting.RespName\$\$	Meeting responsible person name

Notification Template or Product Area	Variable	Description
	\$\$Meeting.Date\$\$	Meeting date
	\$\$Meeting.Location\$\$	Meeting location
	\$\$Meeting.StartTime\$\$	Meeting start time
	\$\$Meeting.EndTime\$\$	Meeting end time
	\$\$Meeting.IsAllDayEvent\$\$	All day event
	\$\$Meeting.Subject\$\$	Meeting subject
	\$\$Meeting.Attendee\$\$	Meeting attendee
	\$\$Meeting.Body\$\$	Meeting body
	\$\$Meeting.Comment\$\$	Meeting comment
	\$\$Meeting.MaxItem\$\$	Maximum agenda items
	\$\$Meeting.Agenda\$\$	Meeting agenda ID
	\$\$Meeting.Duration\$\$	Meeting duration
	\$\$Meeting.NoticeDate\$\$	Meeting notice date
	\$\$Meeting.Status\$\$	Meeting status
	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$userName\$\$	Public user name
	\$\$password\$\$	Public user password
	\$\$email\$\$	Public user email
	\$\$inputName\$\$	Proxy user's nickname
	\$\$personalNote\$\$	Proxy user's invitation message
	\$\$inviterName\$\$	Public user name
	\$\$userID\$\$	Public user ID
	\$\$email\$\$	Public user's email
	\$\$password\$\$	Public user's password
	\$\$activationURL\$\$	activation URL
MEETING_UPDATE	\$\$Meeting.Type\$\$	Meeting type
	\$\$Meeting.RespDept\$\$	Meeting responsible person's department
	\$\$Meeting.RespName\$\$	Meeting responsible person name
	\$\$Meeting.Date\$\$	Meeting date
	\$\$Meeting.Location\$\$	Meeting location
	\$\$Meeting.StartTime\$\$	Meeting start time
	\$\$Meeting.EndTime\$\$	Meeting end time
	\$\$Meeting.IsAllDayEvent\$\$	All day event
	\$\$Meeting.Subject\$\$	Meeting subject
	\$\$Meeting.Attendee\$\$	Meeting attendee
	\$\$Meeting.Body\$\$	Meeting body
	\$\$Meeting.Comment\$\$	Meeting comment
	\$\$Meeting.MaxItem\$\$	Maximum agenda items

Notification Template or Product Area	Variable	Description
	\$\$Meeting.Agenda\$\$	Meeting agenda ID
	\$\$Meeting.Duration\$\$	Meeting duration
	\$\$Meeting.NoticeDate\$\$	Meeting notice date
	\$\$Meeting.Status\$\$	Meeting status
	\$\$ORIG_Meeting.Type\$\$	Original meeting type
	\$\$ORIG_Meeting.RespDept\$\$	Original meeting responsible person's department
	\$\$ORIG_Meeting.RespName\$\$	Original meeting responsible person's name
	\$\$ORIG_Meeting.Date\$\$	Original meeting date
	\$\$ORIG_Meeting.Location\$\$	Original meeting location
	\$\$ORIG_Meeting.StartTime\$\$	Original meeting start time
	\$\$ORIG_Meeting.EndTime\$\$	Original meeting end time
	\$\$ORIG_Meeting.IsAllDayEvent\$\$	Original meeting all day event
	\$\$ORIG_Meeting.Subject\$\$	Original meeting subject
	\$\$ORIG_Meeting.Body\$\$	Original meeting body
	\$\$ORIG_Meeting.Comment\$\$	Original meeting comment
	\$\$ORIG_Meeting.MaxItem\$\$	Original maximum agenda items
	\$\$ORIG_Meeting.Agenda\$\$	Original meeting agenda ID
	\$\$ORIG_Meeting.Duration\$\$	Original meeting duration
	\$\$ORIG_Meeting.NoticeDate\$\$	Original meeting notice date
	\$\$ORIG_Meeting.Status\$\$	Original meeting status
MESSAGE ACA_CONNECT_LICENSE_APPROVE_OWNER	\$\$publicUserID\$\$	Public user ID
	\$\$publicUserName\$\$	Public user Name
	\$\$licenseNumber\$\$	License number
	\$\$actionType\$\$	Action type, for example: approved, rejected, connected, disconnected.
	\$\$actionDate\$\$	Action date
	\$\$userId\$\$	User ID
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account. For more information, see Setting an Associated Contact as the Account Owner .
	\$\$middleName\$\$	
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
MESSAGE ACA_CONNECT_LICENSE_APPROVE_USER	\$\$publicUserID\$\$	Public user ID

Notification Template or Product Area	Variable	Description
	\$\$publicUserName\$\$	Public user name
	\$\$licenseNumber\$\$	License Number
	\$\$actionType\$\$	Action type, for example: approved, rejected, connected, disconnected.
	\$\$actionDate\$\$	Action date
	\$\$userId\$\$	User name
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$middleName\$\$	For more information, see Setting an Associated Contact as the Account Owner .
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
MESSAGE_ACA_CONNECT_LICENSE_CONNECT_OWNER	\$\$publicUserID\$\$	Public user ID
	\$\$publicUserName\$\$	Public user name
	\$\$licenseNumber\$\$	License number
	\$\$actionType\$\$	Action type, for example: approved, rejected, connected, disconnected.
	\$\$actionDate\$\$	Action date
	\$\$userId\$\$	User ID
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account.
	\$\$middleName\$\$	For more information, see Setting an Associated Contact as the Account Owner .
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
MESSAGE_ACA_CONNECT_LICENSE_CONNECT_USER	\$\$publicUserID\$\$	Public user ID
	\$\$publicUserName\$\$	Public user name
	\$\$licenseNumber\$\$	License number
	\$\$actionType\$\$	Action type, for example: approved, rejected, connected, disconnected.
	\$\$actionDate\$\$	Action date
	\$\$userId\$\$	User ID

Notification Template or Product Area	Variable	Description
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account. For more information, see Setting an Associated Contact as the Account Owner .
	\$\$middleName\$\$	
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
MESSAGE_ACA_CONNECT_LICENSE_DISCONNECT_OWNER	\$\$publicUserID\$\$	Public user ID
	\$\$publicUserName\$\$	Public user name
	\$\$licenseNumber\$\$	License number
	\$\$actionType\$\$	Action type, for example: approved, rejected, connected, disconnected.
	\$\$actionDate\$\$	Action date
	\$\$userId\$\$	User ID
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account. For more information, see Setting an Associated Contact as the Account Owner .
	\$\$middleName\$\$	
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
MESSAGE_ACA_CONNECT_LICENSE_DISCONNECT_USER	\$\$publicUserID\$\$	Public user ID
	\$\$publicUserName\$\$	Public user name
	\$\$licenseNumber\$\$	License number
	\$\$actionType\$\$	Action type, for example: approved, rejected, connected, disconnected.
	\$\$actionDate\$\$	Action date
	\$\$userId\$\$	User ID

Notification Template or Product Area	Variable	Description
MESSAGE_ACA_CONNECT_LICENSE_REJECT_OWNER	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account. For more information, see Setting an Associated Contact as the Account Owner .
	\$\$middleName\$\$	
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
MESSAGE_ACA_CONNECT_LICENSE_REJECT_USER	\$\$publicUserID\$\$	Public user ID
	\$\$publicUserName\$\$	Public user name
	\$\$licenseNumber\$\$	License number
	\$\$actionType\$\$	Action type, for example: approved, rejected, connected, disconnected.
	\$\$actionDate\$\$	Action date
	\$\$userId\$\$	User ID
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account. For more information, see Setting an Associated Contact as the Account Owner .
	\$\$middleName\$\$	

Notification Template or Product Area	Variable	Description
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account. For more information, see Setting an Associated Contact as the Account Owner .
	\$\$middleName\$\$	
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
MESSAGE_AUTOMATED_PLANREVIEW	\$\$planList\$\$	Plan list
MESSAGE_NOTICE_LICENSE_EXPIRED	\$LICENSETYPE\$	[Case sensitive] License type
	\$STATELICENSENO\$	[Case sensitive] State license number
	\$LICENSESTATE\$	[Case sensitive] License state
	\$LICENSELASTRENEWALDATE\$	[Case sensitive] License last renewal date
	\$LICENSEEXPIRATIONDATE\$	[Case sensitive] License expiration date
	\$FIRSTNAME\$	[Case sensitive] First name
	\$MIDDLENAME\$	[Case sensitive] Middle name
	\$LASTNAME\$	[Case sensitive] Last name
	\$INSURANCECOMPANY\$	[Case sensitive] Insurance company
	\$POLICYNUMBER\$	[Case sensitive] Policy number
	\$INSURANCEEXPIRATIONDATE\$	[Case sensitive] Insurance expiration date
	\$BUSINESSLICENSENO\$	[Case sensitive] Business license #
	\$BUSINESSLICENSEEXPDATE\$	[Case sensitive] business License expiration date
MESSAGE_NOTICE_RESULT_INSPECTION	\$CAPID\$ / \$\$CAPID\$\$	Record ID
	\$PERMITID\$ / \$\$PERMITID\$\$	Permit ID
	\$PERMITAPPTYP\$ / \$\$PERMITAPPTYP\$\$	Permit type
	\$PERMITADDR\$ / \$\$PERMITADDR\$\$	Permit address
	\$PERMITPARCEL\$ / \$\$PERMITPARCEL\$\$	Permit parcel
	\$PERMITWRKDESC\$ / \$\$PERMITPARCEL\$\$	Permit work description
	\$INSPITEM\$ / \$\$INSPITEM\$\$	Inspection item
	\$INSPRESULT\$ / \$\$INSPRESULT\$\$	Inspection result
	\$INSPCOMMENT\$ / \$\$INSPCOMMENT\$\$	Inspection comment

Notification Template or Product Area	Variable	Description
	\$COMPLETEDATE\$ / \$\$COMPLETEDATE\$\$	Inspection completed on
MESSAGE_PAYMENT_NOTICE_<Module>	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$capID\$\$	Record ID
	\$\$balance\$\$	Balance due
	\$\$accelaFee\$\$	Amount of fee
	\$\$totalFee\$\$	Total of all fees
	\$\$altID\$\$	Alt record ID
	\$\$userName\$\$	User's display name
MESSAGE_REPORT	\$\$userID\$\$	Public user ID
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$email\$\$	Public user's email
	\$\$CAPID\$\$	Record ID
	\$\$PERMITID\$\$	Permit ID
	\$\$CAPDETAIL\$\$	Record detail
	\$\$PERMITDETAIL\$\$	Permit detail
	\$\$CAPAPPTYPE\$\$	Record type
	\$\$PERMITAPPTYP\$\$	Permit type
	\$\$CAPNAME\$\$	Application name
	\$\$PERMITNAME\$\$	Application name
	\$\$CAPSTATUS\$\$	Record status
	\$\$PERMITSTATUS\$\$	Permit status
	\$\$CAPADDR\$\$	Record address
	\$\$PERMITADDR\$\$	Permit address
	\$\$CAPPARCEL\$\$	Record parcel
	\$\$PERMITPARCEL\$\$	Permit parcel
	\$\$CAPWRKDESC\$\$	Record work description
	\$\$PERMITWRKDESC\$\$	Permit work description
	\$\$INSPITEM\$\$ / \$\$INSPITEM\$\$	Inspection item
	\$\$INSPRESULT\$\$ / \$\$INSPRESULT\$\$	Inspection result
	\$\$INSPCOMMENT\$\$ / \$\$INSPCOMMENT\$\$	Inspection comment
	\$\$firstName\$\$	First name (middle name, last name, business name/organization name, state, city, address, or zip) of the public user. Civic Platform gets the value from the public user's account owner or from a contact associated with the user account. For more information, see Setting an Associated Contact as the Account Owner .
	\$\$middleName\$\$	
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
MESSAGE_SEND_PASSWORD	\$\$userID\$\$	Public user ID

Notification Template or Product Area	Variable	Description
	\$\$servProvCode\$\$	Agency ID; Service Provider Code
	\$\$email\$\$	Public user's email
	\$\$password\$\$	Public user's password
	\$\$firstName\$\$	
	\$\$middleName\$\$	
	\$\$lastName\$\$	
	\$\$businessName\$\$	
	\$\$state\$\$	
	\$\$city\$\$	
	\$\$address\$\$	
	\$\$zip\$\$	
NOTICE_OF_BATCH_JOB_COMPLETED	\$\$JobName\$\$	Batch job name
	\$\$Result\$\$	Batch job result
	\$\$EndTime\$\$	Batch job end time
Workflow Email Notification, defined in Classic Administration > Workflow > Messages	\$\$CAPID\$\$ / \$\$PERMITID\$\$	Record or permit ID
	\$\$CAPDETAIL\$\$ / \$\$PERMITDETAIL\$\$	Record or permit detail
	\$\$CAPAPPTYPE\$\$ / \$\$PERMITAPPTYP\$\$	Record or permit type
	\$\$CAPNAME\$\$ / \$\$PERMITNAME\$\$	Record or permit name
	\$\$CAPSTATUS\$\$ / \$\$PERMITSTATUS\$\$	Record or permit status value
	\$\$CAPADDR\$\$ / \$\$PERMITADDR\$\$	Record or permit address
	\$\$CAPPARCEL\$\$ / \$\$PERMITPARCEL\$\$	Record or permit parcel
	\$\$CAPWRKDESC\$\$ / \$\$PERMITWRKDESC\$\$	Record or permit work description
	\$\$TASK\$\$ / \$\$TASK\$\$	Record or permit task info
	\$\$TASKSTATUS\$\$ / \$\$TASKSTATUS\$\$	Record or permit task status
	\$\$TASKCOMMENTS\$\$ / \$\$TASKCOMMENTS\$\$	Record or permit task comments
	\$\$TASKACTIONBY\$\$ / \$\$TASKACTIONBY\$\$	Record or permit task action by
	\$\$TASKSPECIFICINFO\$\$ / \$\$TASKSPECIFICINFO\$\$	Record or permit task specific info
Record Request Update Comment	\$\$AltID\$\$	Alt ID
	\$\$RecordID\$\$	Record ID
	\$\$AgencyComment\$\$	Agency comment
	\$\$capId1\$\$	Record ID1
	\$\$capId2\$\$	Record ID2
	\$\$capId3\$\$	Record ID3

Notification Template or Product Area	Variable	Description
	\$\$agencyCode\$\$	Agency code
	\$\$module\$\$	Module name

Customizing the Content of Agency Communications

You can customize the content of the following communications:

- Email and SMS text message notifications, meeting and calendar requests, and Citizen Access email announcements
To customize this type of communication, see [Working with Notification Templates](#).
- Receipts and endorsements
To customize this type of communication, use the Content Customize portlet, described in this topic.

Civic Platform generates receipts or endorsements after you process a payment. Civic Platform has default settings for all receipts and endorsements, with the exception of TRUSTACCOUNT_RECEIPT_SUMMARY. You can use the Content Customize feature to create your own design for receipts and endorsements. The customized design overrides the default settings with its own look and level of specificity.

Example Use Case

You design the set payment receipt to include the fee items paid and the remaining set balance, along with other payment details. After you save the design, all set payment receipts generated in Civic Platform conform to the new design.

Topics

- [Adding or Updating a Customized Content](#)
- [Working in the Content Editor](#)

Adding or Updating a Customized Content

You can customize the content for several content types. Civic Platform can only apply one design for a content type. After you create your own design for a content type, you can either update based on the existing design, or clear the design to return to Civic Platform's original design.

This section describes how to add or update a customized content.

To add or update a customized content

1. Access the Content Customize portlet ([Navigating to the Setup Portlet](#)).
2. Complete the fields as necessary ([Working in the Content Editor](#)).
3. Click **Save**.

Working in the Content Editor

Use the WYSIWYG content editor ([Figure 33: Content Editor in Content Customize](#)) to design content and display formats.



Figure 33: Content Editor in Content Customize

Topics

- [Editing Text in the Editor](#)
- [Using Variables in Customized Content](#)
- [Example Customized Content](#)

Editing Text in the Editor

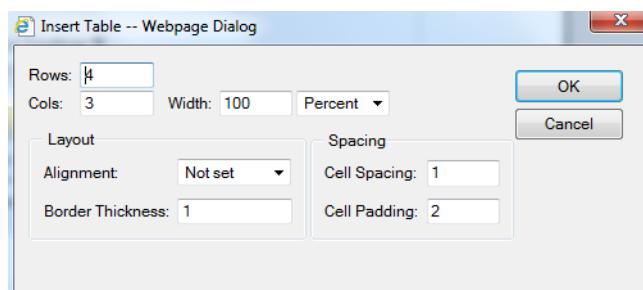
With the text toolbar in the editor, you can customize fonts and the way to organize your text.

To edit text in the editor

1. Position your cursor where you want in the editor, and then enter the text which you want to add.
2. Highlight the text which you want to edit, and then use the text toolbar to edit text properties such as font type, font size, font color, and text alignment.
 - You can add variables to include dynamic content in the receipts or endorsement. For the variables that you can include in the receipt and endorsement content type, refer to [Using Variables in Customized Content](#).
 - You can add a table in the text area, and organize the payment information in a tabular way.

1. Click the **Insert Table** button in the toolbar.

Civic Platform displays the Insert Table dialog.



2. Enter the number of rows and columns in the text boxes, and configure the layout and spacing settings.
3. Click **OK**.

Civic Platform adds the table at where the cursor was.

4. Enter the information you want to include in the table, and add variables in the table cells, as appropriate.
 5. Continue editing the remaining content.
3. For edits to the text alignment of invoices, be aware of the following:
- All fee item variable descriptions use left alignment, except "Total Invoice Amount," "Total Payment," and "Balance."
 - Descriptions of the other variables (including date, operator ID, permit ID, and so forth) use left alignment.
 - All fee amounts use right alignment.



Note:

If you add a content type (RECEIPT_SUMMARY, SET_CHECK_ENDORSEMENT, SET_RECEIPT_SUMMARY, TRANSACTION_CHECK_ENDORSEMENT, TRANSACTION_RECEIPT_SUMMARY, TRUSTACCOUNT_CHECK_ENDORSEMENT, and TRUSTACCOUNT_RECEIPT_SUMMARY) as a Standard Choice Value in the Standard Choice APPLY_SYSTEM_DEFAULT_FORMAT, Civic Platform follows its own default alignment style, instead of the alignment customized here, to generate the corresponding receipts or endorsements. The Standard Choice APPLY_SYSTEM_DEFAULT_FORMAT only affects the alignment style of the receipts, but not the content.

4. Click **Save** to save your changes.

Using Variables in Customized Content

You can use variables in any position of the customized content. This section provides the lists of variables that you can include in receipts and endorsement. See the following lists for details:

- [Table 108: APPLICATION-ENDORSEMENT Variables](#)
- [Table 109: CHECK-ENDORSEMENT Variables](#)
- [Table 110: CHECK RECEIPT Variables](#)
- [Table 111: CREDITCARD RECEIPT Variables](#)
- [Table 112: RECEIPT_SUMMARY Variables](#)
- [Table 113: SET_CHECK_ENDORSEMENT and SET_RECEIPT_SUMMARY Variables](#)
- [Table 114: TRANSACTION_CHECK_ENDORSEMENT Variables](#)
- [Table 115: TRANSACTION_RECEIPT_SUMMARY Variables](#)
- [Table 116: TRUSTACCOUNT_RECEIPT_SUMMARY and TRUSTACCOUNT_CHECK_ENDORSEMENT Variables](#)

To gain a visual understanding on how the variables affect the generated receipt or endorsement, see [Example Customized Content](#).

Table 108: APPLICATION-ENDORSEMENT Variables

\$businessDate\$	The date of payment.
\$contactName\$	The contact name of the payer who makes the payment.

\$contactType	The contact type of the contact.
\$permitNBR\$	The record number.
\$refContactID\$	The reference contact ID number.
\$todayDate\$	The current date.
\$transNBR\$	The transaction number.

Table 109: CHECK_ENDORSEMENT Variables

\$adminFeeDue\$	The administrator fee. This value is always 0.
\$balance\$	The difference between the amount of money invoiced and the amount of money paid; the balance due.
\$businessDate\$	The date of payment.
\$cashDrawerID\$	The cashier's drawer ID number.
\$changeDue\$	The balance if the payment amount is more than the amount due.
\$checkAmount\$	The check amount.
\$checkTendered\$	The money received from check.
\$operateID\$	The cashier's user ID.
\$payerContactType\$	The contact type of the payer.
\$payerName\$	The payer name.
\$payerRefContactID\$	The reference contact ID of the payer.
\$paymentMethodAndAmount\$	The payment method and payment amount.
Pemit Fee Due	The value can be 'Permit', 'Licenses' or 'Gen/Var'.  Note: Unlike other variables, this variable uses no " \$\$ " delimiters.
\$permitFeeDue\$	The fee due in the record.
\$permitNBR\$	The record number.
\$receiptNbr\$	The receipt number.
\$refNBR\$	If the payment method was a check or some other document, such as a money order, this is the check number or number that appears on the document.
\$sessionNbr\$	The cashier session sequence number.
\$todayDate\$	The current date.
\$totalAmtPaid\$	The total payment amount.
\$totalInvoice\$	The total invoice amount.
\$totalPaid\$	The total amount already paid.
\$transNBR\$	The transaction number.

Table 110: CHECK_RECEIPT Variables

\$authorizationCode\$	The check authorization code.
\$batchNumber\$	The batch number of the invoice.
\$businessDate\$	The date of payment.
\$cashDrawerID\$	The cashier's drawer ID number.

\$checkNumber\$	The check number.
\$checkType\$	The check type.
\$convenienceFee\$	A fee assessed to cover the cost of processing.
\$feeDue\$	The fee due.
\$hostCode\$	The authorization code returned from third party
\$objectID\$	The ID of the record or set for which a user is processing payment.
\$objectType\$	The entity type (such as record) for which a user is processing payment.
\$operatorID\$	The cashier's user ID.
\$processingFee\$	The processing fee.
\$referenceID\$	If the payment method was a check or some other document, such as a money order, this is the check number or number that appears on the document.
\$totalAmount\$	The total payment amount.
\$transactionID\$	The transaction ID.

Table 111: CREDITCARD_RECEIPT Variables

\$authorizationCode\$	The credit card authorization code.
\$batchNumber\$	The batch number of the invoice.
\$businessDate\$	The date of payment.
\$cardNumber\$	The credit card number.
\$cardType\$	The credit card type.
\$cashDrawerID\$	The cashier's drawer ID number.
\$convenienceFee\$	A fee assessed to cover the cost of processing.
\$feeDue\$	The fee due.
\$hostCode\$	The authorization code returned from third party
\$objectID\$	The ID of the record or set for which a user is processing payment.
\$objectType\$	The entity type for which a user is processing payment. Allowable values are: SET, Permit, POS, Trust Account, Transaction or Group.
\$operatorID\$	The cashier's user ID.
\$processingFee\$	The processing fee.
\$referenceID\$	If the payment method was a check or some other document, such as a money order, this is the check number or number that appears on the document.
\$totalAmount\$	The total payment amount.
\$transactionID\$	The transaction ID.

Table 112: RECEIPT_SUMMARY Variables

\$adminFeeDue\$	The administrator fee. This value is always 0.
\$balance\$	The difference between the amount of money invoiced and the amount of money paid; the balance due.

\$businessDate\$	The date of payment.
\$cashDrawerID\$	The cashier's drawer ID number.
\$changeDue\$	The balance if the payment amount is more than the amount due.
\$checkAmount\$	The check amount.
	 Note: You can replace "check" with another payment method in the variable name, for example, \$cashAmount\$. The variable stands for the amount by the payment method.
\$checkTendered\$	The money received from check.
\$feeItems\$	The fee items.
\$operatorID\$	The cashier's user ID.
\$paymentMethodAndAmount\$	The payment method and payment amount.
Permit Fee Due	The value can be 'Permit', 'Licenses' or 'Gen/Var'.  Note: Unlike other variables, this variable uses no " \$\$ " delimiters.
\$permitNBR\$	The record number.
\$receiptNbr\$	The receipt number.
\$receivedType\$	The form of payment.
\$refNBR\$	If the payment method was a check or some other document, such as a money order, this is the check number or number that appears on the document.
\$sessionNbr\$	The cashier session sequence number.
\$todayDate\$	The current date.
\$totalAmtPaid\$	The total payment amount.
\$totalInvoice\$	The total invoice amount.
\$totalPaid\$	The total amount already paid.
\$transNBR\$	The transaction number.

Table 113: SET_CHECK_ENDORSEMENT and SET_RECEIPT_SUMMARY Variables

\$adminFeeDue\$	The administrator fee. This value is always 0.
\$balance\$	The difference between the amount of money invoiced and the amount of money paid; the balance due.
\$businessDate\$	The date of payment.
\$cashDrawerID\$	The cashier's drawer ID number.
\$changeDue\$	The balance if the payment amount is more than the amount due.
\$checkAmount\$	The check amount.
\$checkAmount\$	The check amount.  Note: You can replace "check" with another payment method in the variable name, for example, \$cashAmount\$. The variable stands for the amount by the payment method.
\$checkTendered\$	The money received from check.

\$feeItems\$	The fee items.
	Note: This variable is applicable in SET_RECEIPT_SUMMARY, not in SET_CHECK_ENDORSEMENT.
\$operatorID\$	The cashier's user ID.
\$paymentMethodAndAmount\$	The payment method and payment amount.
\$permitFeeDue\$	The fee due in the record.
\$receiptNbr\$	The receipt number.
\$receivedType\$	The form of payment.
	Note: This variable is applicable in SET_RECEIPT_SUMMARY, not in SET_CHECK_ENDORSEMENT.
\$refNBR\$	If the payment method was a check or some other document, such as a money order, this is the check number or number that appears on the document.
\$sessionNbr\$	The cashier session sequence number.
\$setId\$	The identification number of the set for which you are processing payment.
\$setName\$	The name of the set for which you are processing payment.
\$todayDate\$	The current date.
\$totalAmtPaid\$	The total payment amount.
\$totalInvoice\$	The total invoice amount.
\$totalPaid\$	The total amount already paid towards the set invoice.
\$transNBR\$	The transaction number.

Table 114: TRANSACTION_CHECK_ENDORSEMENT Variables

\$businessDate\$	The date of payment.
\$cashierDrawID\$	The cashier's drawer ID number.
\$forPermitNbr\$	The record number for which a user is processing payment.
\$forPOSTransNbr\$	The POS transaction number for which a user is processing payment.
\$paymentMethodAndAmount\$	The payment method and payment amount.
\$receiptNbr\$	The receipt number.
\$sessionNbr\$	The cashier session sequence number.
\$todayDate\$	The current date.
\$totalAmtPaid\$	The total payment amount.

Table 115: TRANSACTION_RECEIPT_SUMMARY Variables

\$adminFeeDue\$	The administrator fee. This value is always 0.
\$ATMTendered\$	The money received from ATM.
\$balance\$	The difference between the amount of money invoiced and the amount of money paid; the balance due.

\$billedTendered\$	The money received from bill.
\$businessDate\$	The date of payment.
\$cashierDrawID\$	The cashier's drawer ID number.
\$cashTendered\$	The money received from cash.
\$changeDue\$	The balance if the payment amount is more than the amount due.
\$checkTendered\$	The money received from check.
\$couponTendered\$	The money received from a coupon.
\$creditCardTendered\$	The money received from a credit card.
\$currentAmtPaid\$	The current amount paid.
\$debitCardTendered\$	The money received from a debit card.
\$feeItems\$	The fee items.
\$forPermitNbr\$	The record number for which a user is processing payment.
\$forPOSTransNbr\$	The POS transaction number for which a user is processing payment.
\$internalTransferTendered\$	The money received from internal transfer.
\$journalEntryTendered\$	The money received from journal entry.
\$lockboxTendered\$	The money received from a lock box.
\$miscCreditTendered\$	The money received from miscellaneous credit.
\$moneyOrderTendered\$	The money received from money order.
\$multipleTendersTendered\$	The money received from multiple tenders.
\$operatorID\$	The cashier's user ID.
\$otherTendered\$	The money received from other payment methods.
\$permitFeeDue\$	The fee due in the record.
\$receiptNbr\$	The receipt number.
\$receivedType\$	The form of payment.
\$sessionNbr\$	The cashier session sequence number.
\$todayDate\$	The current date.
\$totalAmtPaid\$	The total payment amount.
\$totalInvoiceAmount\$	The total invoice amount.
\$totalPayment\$	The total amount already paid.
\$trustAccountTendered\$	The money received from trust account.
\$unapplied\$	The unapplied credit.
\$waiverTendered\$	The money received from waiver.
\$writeOffTendered\$	The money received from write off.

Table 116: TRUSTACCOUNT_RECEIPT_SUMMARY and TRUSTACCOUNT_CHECK_ENDORSEMENT Variables

\$accountBalance\$	The balance of the trust account.
\$accountNBR\$	The trust account ID number for the trust account.
\$amount\$	The payment amount.
\$businessDate\$	The date of payment.
\$cashDrawerID\$	The cashier's drawer ID number.

\$refNBR\$	If the payment method was a check or some other document, such as a money order, this is the check number or number that appears on the document.
\$sessionNbr\$	The cashier session sequence number.
\$tenderType\$	The payment type.
\$todayDate\$	The current date.
\$transComments\$	The comments added in the transaction.
\$transNBR\$	The transaction number.
\$transType\$	The transaction type.

Example Customized Content

The following code snippet is an example of the content for the RECEIPT_SUMMARY content type:

```

The functioning variables for RECEIPT_SUMMARY are as following:
-----
Record Receipt Summary Template

Session Nbr: $sessionNbr$
Trans NBR: $transNBR$
For Permit Nbr: $permitNBR$
Business Date: $businessDate$
Today Date: $todayDate$
Permit Fee Due: $permitFeeDue$
Admin Fee Due: $adminFeeDue$
Total Amt Paid: $totalAmtPaid$
Operate ID: $operateID$

CashDrawerID: $cashDrawerID$

Fee Items
$feeItems$

Total Invoice Amount: $totalInvoice$
Total Payment: $totalPaid$
Balance: $balance$
-----
$paymentMethodAndAmount$
Change Due: $changeDue$
Cash Tendered: $cashAmount$
Check Tendered: $checkAmount$ (Ref#$checkTendered$)
Ref: $refNBR$

payor:$payor$
```

With the previous example, Civic Platform generates the receipt summary for a record, as illustrated in [Figure 34: Example Receipt Summary](#).

Receipt Summary

The functioning variables for RECEIPT_SUMMARY are as following:

Record Receipt Summary Template

Session Nbr : 34
Trans NBR : 216
For Permit Nbr: 13CAP-00000123
Business Date : 03/27/2013 11:13:47AM
Today Date : 05/15/2013 06:37:01PM
Permit Fee Due: \$1,490.00
Admin Fee Due : \$0.00
Total Amt Paid: \$1,490.00
Operate ID : ADMIN

CashDrawerID :

Fee Items

Total Invoice Amount: \$1,550.00
Total Payment: \$60.00
Balance: \$1,490.00

Cash Tendered \$1,490.00
Change Due : \$0.00
Cash Tendered: \$1,490.00
Check Tendered: (Ref#)
Ref:

payor:\$payor\$

[Print Receipt](#) [Cancel](#)

Figure 34: Example Receipt Summary

Setting Up Calendars

Civic Platform provides the following four calendar types:

- Inspection
- Meeting
- Agency Holiday
- User

You can configure these calendars so that agency users can schedule meetings, inspections, and so forth.

Click a topic title below for full details.

Related Information

[Configuring Calendars](#)

[Working with Calendars](#)

[Setting Up and Maintaining Calendars](#)

[Setting Up and Maintaining Supervisors](#)

[Setting Up and Maintaining Meeting Types](#)

[Scenarios](#)

[Managing Calendar Items through the Calendar Portlet](#)

Configuring Calendars

Before you can create, access and use calendars, configure the appropriate Function Identifications (FIDs) and Standard Choices. Refer to the *Accela Civic Platform Configuration Reference*. Inspection calendars require additional setup before use.

Working with Calendars

After you configure the calendars, most calendar related operations take place in the calendar administration portlet.

Topics

- [Finding a Calendar](#)
- [Viewing Daily, Weekly, and Monthly Calendars](#)
- [Printing a Calendar](#)
- [Cloning and Copying Calendars](#)
- [Assigning Daily Units](#)
- [Scheduling Calendar Items](#)

Finding a Calendar

You can navigate calendars by type, name, permission, or inspection type. You can also search for a calendar by different search criteria.

You can find an existing calendar by expanding and navigating the calendar portlet search for a user calendar to modify calendar details and scheduled user leaves.

To find calendar

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).

Civic Platform displays a portlet for navigating or searching calendars.

The screenshot shows the 'Calendar Name' search interface. On the left, a sidebar lists categories: 'Calendar by Type', 'Calendar by Name', 'Calendar by Permission', 'Calendar by Inspection Type', 'Meeting Type Maintenance', and 'Supervisor Maintenance'. The main area has tabs for 'Calendar', 'Daily', 'Weekly', and 'Monthly'. Below the tabs is a table with one row:

Calendar Name	Type	Status
<My User Calendar>	USER	Active

- To navigate to a calendar by type, expand the calendar categories on the left side panel until you find the calendar.
- Click **Search** to find a calendar by specifying search criteria.

Civic Platform displays the Calendar search page.

The screenshot shows the 'Calendar' search interface. It includes fields for 'Calendar Name', '# Scheduling Attempts', 'Status' (a dropdown menu), and 'Type' (a dropdown menu). Buttons for 'Submit', 'Reset', 'Cancel', and 'Help' are at the top.

- a. Complete the fields and click **Submit**. For a complete list of Calendar search fields, see [Table 124: Calendar Search Fields](#).

Civic Platform displays the calendars that match your search criteria in the Calendar list portlet.



Note:

You can use search to locate inactive holiday calendars.

Viewing Daily, Weekly, and Monthly Calendars

Each calendar provides Daily, Weekly, and Monthly tabs to view different time frames of scheduled calendar items.

To view a calendar

1. Find the calendar you want to view ([Finding a Calendar](#)).

2. Click the **Daily** tab.

Civic Platform displays start time, end time, the calendar type, and the name of the calendar items scheduled for the current day.

Calendar Name: My_Inspection_Calendar

Menu New Delete Help

Calendar Daily Weekly Monthly

February 13, 2013

Start Time	End Time	Type	Calendar Item
08:00 AM	12:00 PM	Inspection	AM Inspection Range
12:00 PM	01:00 PM	Block Out	Lunch
01:00 PM	04:00 PM	Inspection	PM Inspection Range

- Click the link in the calendar item column to display the schedule details.
- Click the **New** button to schedule a calendar item ([Assigning Daily Units](#)).
- Click the option to select a calendar item and delete the item or perform one Menu button operations.

3. Click the **Weekly tab.**

Civic Platform displays calendar items scheduled for the current week.

Calendar Name: All Calendars

Menu New Delete Print Help

Calendar Daily Weekly Monthly

◀ February 10 - 16, 2013 ▶ Show all items for calendars

02/10 Sunday	02/11 Monday	02/12 Tuesday	02/13 Wednesday	02/14 Thursday	02/15 Friday	02/16 Saturday
12 ⁰⁰						
10 ⁰⁰						
2 ⁰⁰						
3 ⁰⁰						
4 ⁰⁰						
5 ⁰⁰						
6 ⁰⁰			06:00am-07:00am My Meeting S...	06:00am-07:00am My Meeting R...		
7 ⁰⁰						

- Click the link for the calendar item to display the schedule details.
- Click the left and right arrows at the top of the calendar to page through the weeks.
- Click **Show all items for calendars** to display all calendar items ([Creating Master Calendars](#)).
- Click the **New** button to schedule a calendar item ([Assigning Daily Units](#)).
- Hover over the **Menu** button and select one of the operations to perform on the calendar.

4. Click the **Monthly tab.**

Civic Platform displays calendar items scheduled for the current month.

The screenshot shows a monthly calendar for February 2013. The days of the week are labeled at the top: Sun, Mon, Tue, Wed, Thu, Fri, Sat. The calendar grid shows dates from 1 to 28. Specific events are listed in some cells: 'Initial Fin...' on Feb 5, 'My Meeting ...' on Feb 13, and a yellow-highlighted cell on Feb 14. Navigation buttons at the top include 'Last Month', 'February' (with a dropdown arrow), '2013' (with a dropdown arrow), 'Show all items for calendars' (with a checked checkbox), and 'Next Month'. Below the calendar, there are tabs for 'Calendar', 'Daily', 'Weekly', and 'Monthly'.

- Click the link for the calendar item to display the schedule details.
- Click the left and right arrows at the top of the calendar to page through the months.
- Click the **New** button to schedule a calendar item ([Assigning Daily Units](#)).
- Click **Show all items for calendars** to display all calendar items ([Creating Master Calendars](#)).
- Hover over the **Menu** button and select one of the operations to perform on the calendar.

Printing a Calendar

You can print calendars from the Weekly or Monthly Calendar views. Calendars print exactly as they display. For example, if you print a calendar from the Weekly Calendar view, then the calendar prints the week in view. This same logic applies to monthly calendar views.

To print a calendar

1. Find the calendar you want to print ([Finding a Calendar](#)).

2. Click the **Weekly** or **Monthly** tab.

Based on the tab you click, Civic Platform displays the Weekly or Monthly calendar view.

3. Click **Print**.

Accela displays a printable version of the calendar in your browser window.

4. Choose **File** and select **Print** from your browser menu.

Cloning and Copying Calendars

Use the clone feature and the copy feature to apply standard block-out dates, times, and other calendar details to multiple calendars. Clone a calendar to create a new, duplicate calendar. When you clone a calendar, you specify the source calendar content you want to include in the new calendar, including block out days, holidays, weekends, and other shared information. Copy a calendar to duplicate source calendar details, such as block out days, holidays, and meetings, to an existing target calendar.

Use Case Example

You have holidays that apply to all departments in your agency. You can set up holidays in one calendar and copy this information to other calendars.

To clone or copy a calendar

1. Find the calendar you want to clone or copy ([Finding a Calendar](#)).
2. Clone the calendar by completing one of these actions:
 - From the navigation tree, right-click on the calendar you want to clone and choose **Clone Calendar** or **Copy Calendar** from the drop-down list.
 - From the Calendar detail portlet, hover over the **Menu** button and choose **Clone Calendar** or **Copy Calendar** from the drop-down list.

Civic Platform displays the clone (shown) or copy calendar portlet.

Calendar Name: ACA_Commercial_Inspections

Submit Cancel Help

Calendar Name: *

Includes

- Block Out Days
- Inspection Calendar Items
- Inspections
- Permissions
- Districts

3. Complete **Calendar Name** (for clone) or **Copy To Calendar** (for copy) field:

Calendar Name	When cloning a calendar, enter a unique name to identify the new calendar.
Copy To Calendar	When copying a calendar, enter the name of the calendar to which to copy the select includes.

4. Choose the source items you want to include from the cloned or copied calendar. The type of calendar that you clone or copy, such as an inspection or meeting, determines the type of information you can clone or copy ([Table 117: Cloning and Copying Calendar Includes](#)).

Table 117: Cloning and Copying Calendar Includes

Block Out Days	Inspection and User calendars.
Districts	Inspection calendars.
Meetings	Meeting calendars.
Meeting Agenda	Meeting calendars.
Meeting Attendees	Meeting calendars.
Holidays	Agency Holiday calendar
Inspection Calendar Items	Inspection calendars.
Inspections	Inspection calendars. Copies or clones inspection block out periods.
Permissions	Inspection and Meeting calendars.
Weekend	Agency Holiday calendar. Copies or clones weekend block out periods.

5. Click **Submit**.

Civic Platform creates the cloned calendar or copies the included information to the specified calendar.

Assigning Daily Units

When you create a calendar, you set the default number of time blocks (units) you can schedule per day in the **#Units Allocated per Time Range** field ([Table 119: Calendar Detail Field Descriptions](#)). This **#Units Allocated per Time Range** field gets its default value from the daily unit setting you assign in the calendar.

To assign daily units

1. Find the calendar you want to modify ([Finding a Calendar](#)).
2. Click the Daily, Weekly, or Monthly tab.
3. Hover over the **Menu** button and select **Assign Daily Units** from the drop-down list.

Civic Platform displays the Assign Daily Units portlet.

Date	Units
09/01/2012	4.0
09/02/2012	4.0
09/03/2012	4.0
09/04/2012	4.0
09/05/2012	4.0
09/06/2012	4.0
09/07/2012	4.0
09/08/2012	4.0
09/09/2012	8.0
09/10/2012	4.0
09/11/2012	4.0
09/12/2012	4.0
09/13/2012	4.0
09/14/2012	4.0
09/15/2012	4.0
09/16/2012	4.0

4. Select the date for which you want to assign a special unit. The value in the **# Units Allocated per Day** field determines the default number of units in a date.



Note:

The portlet lists all the dates in the current month by default. Click the calendar icon above the date list to retrieve the dates of a different month.

5. Modify the unit value in the **Units** column, as required.

6. Click the **Submit**.

Civic Platform updates the daily unit settings.

Scheduling Calendar Items

You can schedule calendar items in the Daily, Weekly, or Monthly tab for any of the calendar types:

- Inspection

- Event
- Hearing
- Agency Holiday
- User
- Meeting

To schedule a calendar item

1. Find the calendar you want to modify ([Finding a Calendar](#)).
2. Click the Daily, Weekly, or Monthly tab.
3. Click the **New** button.
Civic Platform displays the Calendar Item portlet.
4. Complete the fields that display. For a complete list of the fields that display, see [Table 118: Calendar Item Field Descriptions](#).
5. Click the **Submit** button.

Table 118: Calendar Item Field Descriptions

All-Day Event	Mark this check box if you want the calendar item you schedule to occupy the entire calendar day on which it is scheduled. When you mark this check box, the Start Time and End Time drop-down lists are greyed out.
Calendar Item	Enter a distinct name for the calendar item you want to schedule.
Comments	Enter comments related to the calendar item you schedule. For example, if you are scheduling a hearing, you might want to enter a hearing description, such as, “Plan review for proposed subdivision.”
Date	Use the Date button to choose a day to schedule the calendar item or type in the calendar item date.
End Recurrence	If you are scheduling a recurring calendar item, indicate when you want to end the recurring calendar item. To continue a calendar item indefinitely, leave this field empty.
End Time	Select the calendar item end-time using the drop-down list.
Hearing Body	This field appears only when you schedule a calendar item on a hearing calendar. Enter the name of the hearing body that will attend the hearing. For example, you might enter Planning Commission or Land Use Appeals Board. A hearing body is an individual or a group of people responsible for reviewing applications in a public setting, such as planning commission or land use appeals board members. Hearing body members mediate hearings and might be required to reject or accept applications based on the hearing results.
Location	This field appears only when you schedule a calendar item on a hearing calendar. Select the hearing location from this drop-down list. The values that populate this list are determined by the Standard Choice, HEARING LOCATION (see the <i>Accela Civic Platform Configuration Reference</i>).
Maximum Items	This field appears only when you schedule a calendar item on a hearing calendar. Enter the maximum number of applications that can be reviewed at the hearing.
Maximum Agenda Items	This field appears only when you schedule a calendar item on a meeting calendar. Enter the maximum number of agenda items that can be reviewed at the meeting.

Meeting Body	This field appears only when you schedule a calendar item on a meeting calendar. Select the meeting body from the drop-down list. The values that populate this list are determined by the Standard Choice, MEETING BODY (see the <i>Accela Civic Platform Configuration Reference</i>).
Meeting Status	This field appears only when you schedule a calendar item on a meeting calendar. Select the status of the meeting, such as Approved or Pending. The displayed values depend on the status group for the meeting type determined by the Standard Choice MEETING_TYPE_STATUS_{Group Name} (see the <i>Accela Civic Platform Configuration Reference</i>).
Meeting Type	This field appears only when you schedule a calendar item on a meeting calendar. Select the type of the meeting from the drop-down list. Civic Platform only displays those meeting types for which you have permission.
Organizer	This field appears only when you schedule a calendar item on a meeting calendar. This field is read-only, and displays the current user as the organizer of the meeting calendar item.
Recurrence - None	Mark the radio button if you are scheduling a one-time calendar item.
Notice Date	This field appears only when you schedule a calendar item on a hearing calendar. Enter the date when you want a hearing notice e-mailed to designated recipients. You determine the hearing notice e-mail recipients in the Send Email Notification To drop-down list.
Recurrence - Repeat every day(s)	To repeat a calendar item over a certain number of days, select this option and enter the number of days between each calendar item.
Recurrence - Repeat every week(s) on	To repeat a calendar item over a certain number of weeks, select this option, enter the number of weeks between each calendar item, and choose the day of the week when you want the calendar item to occur.
Recurrence - Repeat every month(s) on	To repeat a calendar item over a certain number of months, select this option, enter the number of months between each calendar item, and choose the day of the week when you want the calendar item to occur.
Recurrence - Repeat every year(s)	To repeat a calendar item over a certain number of years, select this option and enter the number of years between each calendar item.
Reminder	This field appears only when you schedule a calendar item on a meeting calendar. Specifies the number of days, before the meeting, to send out a reminder notification.
Responsible Person	This field appears only when you schedule a calendar item on a meeting calendar. Select the responsible person for the meeting. Click Current User to populate this field with the current user's name.
Send E-mail Notification To	This field appears only when you schedule a calendar item on a hearing calendar. When a hearing is scheduled, a hearing notice can be e-mailed to designated recipients. Select a value from this drop-down list to determine the hearing notice e-mail recipients. You can choose from these values: All Licensed Professionals and Contacts Contacts Licensed Professionals Primary Licensed Professional and Contact
Start Time	Select the starting time for the calendar item using the drop-down list.

Status	This field appears only when you schedule a calendar item on a hearing calendar. Select a value from this drop-down list to determine the status of the hearing calendar item, such as Approved or Pending. The values that displays in this drop-down list are determined by the status group you set for the hearing calendar item type. You associate a status group with a hearing calendar item type in the Event Type Maintenance portlet.
Subject	This field appears only when you schedule a calendar item on a meeting calendar. Enter the subject of the meeting.
Type	Select a value from this drop-down list to classify the type of calendar item you schedule. For example, you might set Inspection, Hearing, Holiday, Block-out, and Weekend as values in this drop-down list. You configure the values for this drop-down list in the Event Type Maintenance portlet. When you set up an event type, you designate the calendar the event type applies to in the Calendar Type drop-down list.
# Units Allocated Per Time Range	This field appears only when you schedule a calendar item on an inspection calendar. Enter a number to define the maximum number of inspections that users can schedule within the time range defined in the calendar item.  Note: The field gets its default value from the daily unit setting (Assigning Daily Units). If you change the value, the setting in the # Units Allocated Per Time Range field overrides the daily unit setting. Regardless of whether FID 8400 is enabled or disabled, when users schedule an inspection (using or not using the auto-assign functionality), Civic Platform calculates the available units before scheduling, specifically: <ul style="list-style-type: none"> • Calculating the available inspection units against the # Units Allocated Per Time Range setting; • Calculating the available inspector units against the Daily Inspection Units setting in the inspector user profile.
Units Displayed in ACA	This field appears only when you schedule an inspection type calendar item. It identifies the number of time blocks (units) displayed for a daily calendar item in Citizen Access. The default value of the field depends on the setting of the ACA Schedule Time Block of the calendar in which the calendar item is created: If the ACA Schedule Time Block field is not configured, you can enter the number of block units to be included in the calendar item in the Units Displayed in ACA field. If the ACA Schedule Time Block field is configured, the default value of Units Displayed in ACA = Available time in the calendar item / ACA Schedule Time Block. For description of the ACA Schedule Time Block field, see Table 119: Calendar Detail Field Descriptions .
Votes By Body Members	This field appears only when you schedule a calendar item on a hearing calendar. Mark an option to indicate whether or not the hearing body members who attend the hearing will vote on the applications they review.

Setting Up and Maintaining Calendars

Civic Platform manages four calendar types (Inspection, Meeting, Agency Holiday, and User). Civic Platform uses the same process for setting up different type calendars. Where applicable, the procedures in this section detail these differences.



Topics:

- [Creating a Calendar](#)
- [Modifying Calendar Details](#)
- [Assigning Calendar Permissions](#)
- [Assigning Districts](#)
- [Assigning and Removing Inspection Types](#)
- [Assigning Inspectors from the Supervisor Calendars](#)

Creating a Calendar

Civic Platform provides the following four calendar types:

- Inspection
- Meeting
- Agency Holiday
- User

Use this procedure to create instances of any of the calendar types listed.

To create a new calendar

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
 - Click **New**.
 - From the navigation tree, right-click any calendar node and then click **New Calendar**. Civic Platform displays the Calendar detail portlet.

The screenshot shows a 'Calendar' configuration page with the following fields:

- Calendar Name ***: A text input field.
- Type ***: A dropdown menu set to **INSPECTION**.
- # Scheduling Attempts ***: A text input field.
- Comments**: A text area.
- Status ***: A dropdown menu set to **Active**.
- # Units Allocated per Day ***: A text input field.
- Priority ***: A text input field.
- Default Block ***: A dropdown menu set to **Minute**.
- Schedule Cut-off Time AM/PM**: A time picker.
- Enable for ACA**: A checkbox.
- Schedule after Cut-off**: A dropdown menu set to **-Select-**.
- Hide Inspection Times in ACA**: A checkbox.

2. Complete the calendar details (Table 119: Calendar Detail Field Descriptions).

Table 119: Calendar Detail Field Descriptions

# Scheduling Attempts*	For inspection calendars. Indicates the number of times Civic Platform attempts to schedule a calendar event or an inspection before displaying an error message.
# Units Allocated per Day*	For inspection calendars. This field determines the default number of units in the daily unit setting (see Assigning Daily Units).
ACA Schedule Time Block	For Citizen Access inspection calendars, this field specifies the time of every time block available for scheduling inspections in an inspection calendar. For example, if you enter 30 minutes in the field, every inspection unit is 30 minutes by default in the inspection calendar.
	<p> Note: The time of each time block is not necessarily the same as the time that an inspection unit takes.</p>
Calendar Name*	Enter a distinct name for the calendar you want to create.
Comments	Enter specific comments related to the calendar, if applicable.
Default Block	For Civic Platform inspection calendars, this field specifies the default block of time that an inspection unit takes in an inspection calendar. For example, if you enter 30 minutes in the default block field, every inspection unit is 30 minutes by default in the inspection calendar.
Department	For a user calendar, select the department that the calendar applies to.
Enable for ACA	For an inspection calendar, select this option to enable an inspection calendar for Citizen Access. If you do not select this option, the calendar is not available for Citizen Access inspection scheduling.
Meeting Reason	For a meeting calendar, enter the meeting reason, if any, for reference.
Hide Inspection Times in ACA	For an inspection calendar, select this option if you want inspection time intervals to be visible to public users with inspection scheduling permissions.
Location	For a meeting calendar, select the location that the meeting takes place.
Priority*	For an inspection calendar, enter a numeric value to designate priority over other calendars. The lower the number, the higher the priority. Civic Platform searches calendars, with a 1 priority, for available units before calendars with a priority of 2.

Schedule # of Days Out	<p>For an inspection calendar, enter the maximum number of future days available for calendar scheduling. Enter a value of 0 to make the calendar unavailable for scheduling. For no scheduling restrictions, leave the field blank. You can enter up to three integers in this field.</p> <p>For example, if the current date is June 5, 2009 and you enter a value of 10, then scheduling for the selected calendar is only available from June 5, 2009 to June 15, 2009. Use this feature to limit calendar scheduling.</p> <p>For example, you might have an inspection calendar set up for electrical inspectors. If some of the electrical inspectors in your agency plan to be out of the office for a conference, or if other inspectors have planned vacation days, you can limit calendar scheduling availability in advance. This prevents users with scheduling authorization on your agency's calendars, such as supervisors, inspectors, and agency employees, from scheduling inspections when inspectors are unavailable. Similarly, you might limit scheduling availability for event calendars based on the planned absence of agency personnel.</p>
Schedule Cut-Off Time AM/PM	<p>For an inspection calendar, use these fields to set a cut-off time for inspection scheduling. If users make a inspection scheduling request after the cut-off time, the earliest possible inspection date is one day later than the date counted directly using the Schedule Days in Advance setting (when they make the scheduling request before the cut-off time). Table 120: Inspection Date Based on the Schedule Days in Advance and Schedule Cut-off Time Settings shows an example on how Citizen Access gets the inspection date based on the Schedule Days in Advance and Schedule Cut-off Time settings.</p>
Schedule Days in Advance	<p>For an inspection calendar, use this field to configure the preparation time needed by agency staff for inspections. For example, if you configure the Schedule Days in Advance as 3 and a user wants to schedule an inspection on July 12, 2014, the user must make the inspection scheduling request on July 9, 2013, so that the agency staff have 3 days to prepare for the inspection.</p> <p>The Schedule Days in Advance setting works jointly with the Schedule Cut-off Time setting.</p> <p>Table 120: Inspection Date Based on the Schedule Days in Advance and Schedule Cut-off Time Settings shows an example of how Citizen Access gets the inspection date based on the Schedule Days in Advance and Schedule Cut-off Time settings.</p>
Status*	<p>Indicates whether the calendar is available for use. The default calendar status is Active. The status field is inactive for AGENCY HOLIDAY calendars.</p> <p>This field designates calendar availability on the user side. Enable the calendar to give users the calendar option in the user daily calendar list. Disable the calendar to keep the calendar in the administration list, but omit it from the user calendar list.</p>
Type*	Select the type of calendar from the drop-down list, such as AGENCY HOLIDAY, INSPECTION, MEETING, OR USER.
User	For a user calendar, select the user that the calendar applies to.

3. Click Submit.

[Table 120: Inspection Date Based on the Schedule Days in Advance and Schedule Cut-off Time Settings](#)

Example Schedule Days in Advance Setting1	Example Schedule Cut-off Time Setting1	Possible Inspection Date	
		If scheduled before 2:00 PM	If scheduled after 2:00 PM
-	2:00 PM	The same day or later	1 day later2
5	-	5 days later2	5 days later2

Example Schedule Days in Advance Setting1	Example Schedule Cut-off Time Setting1	Possible Inspection Date
		If scheduled before 2:00 PM If scheduled after 2:00 PM
5	2:00 PM	5 days later ² 6 days later ²
-	-	The same day or later The same day or later

1These settings work in Citizen Access, and do not apply to supervisors.2The block out days in the inspection calendar are excluded during the counting.

Modifying Calendar Details

To modify calendar details

- Find the calendar for which you want to set or modify permissions ([Finding a Calendar](#)).
 - Click the **Details** tab.
- Civic Platform displays the calendar details portlet.

Calendar Name: ACA_Commercial_Inspections

Menu Save Help

Details Districts Permissions Inspection Types

Calendar Name *	Type *	# Scheduling Attempts *
ACA_Commercial_Inspection;	INSPECTION	3
Comments	Status *	# Units Allocated per Day *
	Active	32
check spelling		
Priority *	Default Block	Schedule Cut-off Time
99	30 Minute	08 : 00 AM
Schedule after Cut-off	<input checked="" type="checkbox"/> Enable for ACA	Schedule # Of Days Out
Next Day	10	
<input type="checkbox"/> Hide Inspection Times in ACA		

- Complete the calendar details ([Table 119: Calendar Detail Field Descriptions](#)).
- Click **Submit**.

Assigning Calendar Permissions

You can assign permissions to inspection and meeting type calendars. You can assign Full, Read, or None as the calendar permission for user groups and individual users.

Use Case Example

You hire new agency personnel and add them to an existing Counter Clerk group in the Building module. You limit calendar access to include only trained personnel.

Use Case Example

You create an inspection type calendar for all the user groups or users that belong to a particular building district. After you assign permissions to a particular user or user group, the inspectors in those groups have permission to view, schedule, and reschedule inspections for the associated calendar type.

To assign user permissions or group permissions to a calendar type

- Find the calendar for which you want to set or modify permissions ([Finding a Calendar](#)).
 - Click the **Permissions** tab.
- Civic Platform displays the calendar permissions portlet with current group permissions, if any.

Type	Module	Name	Access
Group	Building	BuildingAdmin	Full ▾
Group	Building	BuildingDaily	Full ▾
Group	Building	BuildingPublicUser	Full ▾

3. Assign a new permission.

a. Click **Assign.**

Civic Platform displays the modules for which you can assign group permission.

Meeting Type: <MY_MEETING_TYPE>

Search Submit Cancel Help

Details Permissions Record Types Workflow Attendee Types Districts Vote Notification

Select a user group

- + Building
- + Enforcement
- + Planning
- + Licenses
- + ServiceRequest
- + CaseManagement
- + AMS

b. Expand the modules to find the group(s) for which you want to assign a permission.

c. Select the group(s) and select permission from the drop-down list.

d. Click **Submit.**



Note:
By default, Civic Platform sets the permission to Full for the newly assigned group. You might need to modify this permission depending on your business requirements.

4. Modify an existing permission.

a. Select the group for which you want to modify a permission.

b. Select a new permission from the drop-down list.

Full Full grants users access to all functions for the associated calendar.

Read-Only Read-Only grants users access to view but not modify functions for the associated calendar.

None None denies users access to functions for the associated calendar.

c. Click **Submit.**

5. Delete a group permission.

a. Select the group for which you want to remove all permission.

b. Click Delete.

Civic Platform removes the group from the list.

Assigning Districts

You can assign districts to inspection type calendars. You can assign different inspection times based on the district. When users schedule an inspection for a record, the district information in the record address, together with the settings in the inspection district calendar, determine the date and time availability for scheduling.

Use Case Example

You create an inspection calendar to arrange inspections in District A on Monday and Tuesday, and create another calendar to arrange the same types of inspections in District B on Wednesday and Thursday.

To assign districts to a calendar

1. Find the calendar for which you want to set or modify districts ([Finding a Calendar](#)).
2. Click the **Districts** tab.

Civic Platform displays current district associations, if any.

Meeting Type: <MY_MEETING_TYPE>

Menu Assign Delete Help

Details Permissions Record Types Workflow Attendee Types Districts Vote Notification

District

Bronx
 Brooklyn

3. Click **Assign** to add a district association.

Civic Platform displays available districts.

Meeting Type: <MY_MEETING_TYPE>

Menu Submit Cancel Help

Details Permissions Record Types Workflow Attendee Types Districts Vote Notification

District

Bronx
 Brooklyn
 Manhattan
 Queens
 Staten Is...

- a. Select the district(s).

- b. Click **Submit**.



Note:

If you do not associate an inspection calendar with any district, the inspection calendar applies to all districts.

4. Delete a district association.

- a. Select the district.

- b. Click **Delete**.

Assigning and Removing Inspection Types

You can assign inspection types and inspection groups to inspection calendars. For example, if you want to create a calendar for electrical inspections, you can assign an electrical inspection group to the calendar. Civic Platform associates inspection types included in the electrical inspection group with the inspection calendar.

Inspection types are also one filtering criterion used for automatic inspection scheduling. For more information on working with the inspection type calendar filtering criteria, see [Setting Up Automatic Inspection Scheduling](#).

For instructions on configuring inspections for automatic scheduling see [Inspections](#).

Inspection types distinguish inspections, such as mechanical, electrical, and building inspections. Assign inspection types to inspection type calendars to define calendar scope. For example, you might want to associate mechanical inspection types with a mechanical inspection type calendar.

To assign an inspection type to a calendar

1. Find the calendar for which you want to set or modify inspection types ([Finding a Calendar](#)).
2. Click the **Inspection Types** tab from the detail portlet.



Note:

See [Inspections](#) for information on setting up inspection types.

Civic Platform displays the inspection types list portlet.

Inspection Group	Inspection Type	Schedule Inspection in ACA	Cancel Inspection in ACA	Reschedule Inspection in ACA	Enable Ready Time in ACA
BLD Commercial	Sanitary Sewer Final	Schedule Using Calendar	Yes	Yes	No
BLD Commercial	Storm Sewer Final	Schedule Using Calendar	Yes	Yes	No
BLD Commercial	Fire Final	Schedule Using Calendar	Yes	Yes	No
BLD Commercial	Zoning Final	Schedule Using Calendar	Yes	Yes	No
BLD Commercial	Building Final	Schedule Using Calendar	Yes	Yes	No

3. Assign a new inspection type.

- a. Click **Assign**.

Civic Platform displays the Civic Platform inspection types.

- Select an Inspection Type
 - + BLD Commercial
 - + BLD Demolition
 - + BLD Electrical Comm
 - Rough
 - Service
 - Temp Service Pole
 - Ground Work
 - Electrical Final
 - Progress Check

b. Select the inspection type(s) you want to assign.

c. Click **Submit**.

Civic Platform adds the inspection type to the inspection calendar type with default settings.

4. Modify Citizen Access inspection type settings.

a. Select the inspection group for which you want to modify settings.

Inspection Group	Inspection Type	Schedule Inspection in ACA	Cancel Inspection in ACA	Reschedule Inspection in ACA	Enable Ready Time in ACA
BLD Demolition	Hazardous Material ...	Schedule Using Calendar	Yes	Yes	No
BLD Demolition	Progress Check	Schedule Using Calendar	Yes	Yes	No
BLD Demolition	Gas Disconnect	Schedule Using Calendar	Yes	Yes	No
BLD Electrical Comm	Rough	Schedule Using Calendar	Yes	Yes	No
		None			
		Request Only - Pending			
		Request Same Day/Next Day			
		Schedule Using Calendar			

b. Modify the settings in accordance with ([Table 121: Inspection Scheduling Fields for Citizen Access](#)).

Table 121: Inspection Scheduling Fields for Citizen Access

Schedule Inspection in ACA	Choose one of the available scheduling options in Citizen Access: None - Does not allow public users to schedule this inspection type online. Request Only - pending - only allows public users to request for an inspection online. The agency coordinates the appointment for the inspection date and time. Request Same Day Next Day - allows public users to request an inspection for the same day, next day, or next available day, based on inspection type calendar parameters defined on the inspection type. For more information about inspection parameters, refer to Inspections . The inspection cut-off time displays on this page. If you set the cut-off time as 3:00PM and a public user schedules an inspection at 4:00PM and selects the Same Day option, Civic Platform schedules the inspection for the first appropriate inspection slot on the next business day.
	Note: After public users schedule inspection types that you set up for auto-assignment using the Request Same Day Next Day option, you cannot reschedule or cancel the inspections. After public users schedule manual inspections by using the Request Same Day Next Day option, they can reschedule and/or cancel them.
Schedule using calendar	- Allows public users to schedule inspections based on the availability on the inspection type calendar.
Cancel Inspection in ACA	Use the drop-down list to indicate if you want to allow public users to cancel inspections in ACA. Yes allows public users to cancel inspections online. No restricts public users from the ability to cancel inspections online.
Reschedule Inspection in ACA	Use the drop-down list to indicate if you want to allow public users to reschedule inspections in ACA. Yes allows public users to reschedule inspections online. No restricts public users from the ability to reschedule inspections online.
Enable Ready Time in ACA	Use the drop-down list to indicate if you want to allow public users to specify ready time for inspections in the Ready Time field in the ACA Request page. Yes allows public users to specify inspection ready time. No restricts public users from the ability to specify inspection ready time.

c. Click **Submit**.

5. Delete an inspection group.

- a. Select the inspection group.
- b. Click **Delete**.

Assigning Inspectors from the Supervisor Calendars

Civic Platform integrates inspection calendars and supervisor calendars to facilitate inspection scheduling. A supervisor manages and assigns inspectors to inspections. A supervisor can change the view in the supervisor calendar to show assigned inspections for the current calendar, assigned inspections for all calendars, or unassigned inspections that require inspector assignment. For more information about assigning inspections, refer to “Inspections” in the *Accela Civic Platform User Guide*.

To assign inspectors to an inspection from the supervisor calendar

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
2. Select the calendar on which you want to act.
3. Click the **Monthly** tab to select the monthly calendar display.
4. Display supervisor unassigned calendar inspections by selecting the appropriate option from the **Show** drop-down list.
Civic Platform displays applicable calendar information based on selection.
5. Select the inspection to assign an inspector.
6. Click the **Menu** button and select **Assign Inspector** from the drop-down list.
Civic Platform displays an inspections portlet.
7. Select the Address and/or Parcel for the inspection.
8. Click **Submit**.
9. Select the inspector.
The inspectors on this page vary depending on the inspection type, district, and available units.
- 10. Click **Submit**.**
Civic Platform updates the inspection with the inspector.

Setting Up and Maintaining Meeting Types

Meeting types define the different types of meetings that an agency might conduct, such as tax hearings and plan reviews. You must set up meeting types before you can schedule meetings.

Meeting types regulate meetings by applying a specific group of settings to all meetings of a specific meeting type. When you schedule a meeting, you specify the meeting type.

The topics in this section involve specifying the settings for the areas comprising a meeting type definition.



Note:

You must create a meeting type before you can modify it to complete the meeting type definition.

Topics

- [Finding a Meeting Type](#)
- [Creating Meeting Types](#)
- [Modifying Meeting Type Details](#)
- [Setting or Removing Meeting Type Permissions](#)
- [Setting or Removing Record Type Associations](#)
- [Setting or Removing Workflow Task Associations](#)
- [Setting or Removing Attendee Type Associations](#)
- [Setting or Removing District Associations](#)
- [Setting or Removing Vote Result Options](#)
- [Setting Notification Template Associations](#)
- [Deleting Meeting Types](#)

Finding a Meeting Type

You can search for an existing meeting type to modify meeting type settings.

To search for a meeting type

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
2. Click the Meeting Type Maintenance navigation tree.

Civic Platform displays the Meeting Type Maintenance list portlet.

The screenshot shows the Civic Platform interface for managing meeting types. It consists of two main panels: a left sidebar and a right content area.

Left Sidebar:

- Buttons: Menu, Refresh, Help.
- Navigation tree:
 - + Calendar by Type
 - + Calendar by Name
 - + Calendar by Permission
 - + Calendar by Inspection Type
 - + **Meeting Type Maintenance** (selected)
 - + Supervisor Maintenance

Right Content Area - Meeting Type Maintenance List:

- Buttons: Menu, Search, New, Delete, Help.
- Table header: Meeting Type ▲, Description, Status, Meeting Type, Template, Status Group.
- Table rows:
 - <MY_MEETING_TYPE> generic meeting type Active
 - PLANNING COMMIS... Active Planning ...

Right Content Area - Meeting Type: <MY_MEETING_TYPE> Edit Page:

- Buttons: Menu, Submit, Help.
- Tab bar: Details, Permissions, Record Types, Workflow, Attendee Types, Districts, Vote, Notification (Details is selected).
- Form fields:
 - Meeting Type *: <MY_MEETING_TYPE>
 - Description: generic meeting type
 - Status *: Active
 - Template: BLD_RES
 - Meeting Type Status Group: City Council
- Links: check spelling

3. Click **Search**.

Civic Platform displays the Meeting Type search page.

Meeting Type Maintenance:

Menu ▾ Submit Reset Cancel Help

Meeting Type <input type="text"/>	Description <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> check spelling	Status --Select-- ▾
Template --Select-- ▾		

4. Complete the fields. For a complete list of Meeting Type fields, see [Table 122: Meeting Type Field Descriptions](#).

5. Click Submit.

Civic Platform displays the meeting types that match your search criteria.

Creating Meeting Types

When you set up meeting types, you designate the type and the status group. You must create the meeting type first, then complete the tabs for the meeting type to complete the meeting type definition.

To create a meeting type

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
 2. Click the Meeting Type Maintenance navigation tree.
Giga Platform displays the Meeting Type Maintenance list on the right.

CMc Platform displays the Meeting Type Maintenance list portlet.

Meeting Type Maintenance:

Meeting Type	Description	Status	Meeting Type Status Group	Template
<MY_MEETING_TYPE>	generic meeting type	Active		
PLANNING COMMIS...		Active	Planning ...	

Meeting Type: <MY_MEETING_TYPE>

Details Permissions Record Types Workflow Attendee Types Districts Vote Notification

Meeting Type * <MY_MEETING_TYPE> Status * Active Meeting Type Status Group City Council

Description generic meeting type Template BLD_RES

[check spelling](#)

- 3. Choose one of these options:**

- Click **New** in the Meeting Type Maintenance list portlet.
 - Right-click any Meeting Type Maintenance navigation tree node, and then click **New Meeting Type**. Civic Platform displays the Meeting Type detail portlet.

Meeting Type Maintenance:

Meeting Type *

Status *

Meeting Type Status Group

Description

Template

[check spelling](#)

4. Complete the meeting type field details ([Table 122: Meeting Type Field Descriptions](#)).

5. Click **Submit**.

Civic Platform displays a confirmation message indicating successful creation of the meeting type.

Table 122: Meeting Type Field Descriptions

Label	Description
Description	A description of the meeting type.
Meeting Type*	The name to identify the meeting, such as Staff Meeting or Facility Reservation.
Status	The status of the meeting, active or inactive. If a meeting type is active, it displays in the Type drop-down list on the Calendar Meeting Scheduling page.
Meeting Type Status Group	The status group for the meeting type. The values for this drop-down list depend on the settings in the MEETING_TYPE_STATUS_[STATUS_GROUP_NAME] Standard Choice, APPROVED, PENDING, or DENIED, for example.
Template	A list of active ASI group codes. The selected template determines additional fields that display in the details tab for meetings of the specified type.

Modifying Meeting Type Details

You can modify existing meeting types to change the field values.

To modify a meeting type

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
2. Select the meeting type you want to modify.
 - Navigate to the meeting type from the navigation tree in the calendar administration portlet.
 - Use search to find the meeting type of interest ([Finding a Meeting Type](#)).
3. Modify the meeting type fields as required. For a complete description of meeting type fields, see [Table 122: Meeting Type Field Descriptions](#).
4. Click **Submit**.

Setting or Removing Meeting Type Permissions

Your ability to view meeting details depends on your group membership, your group's permission with the meeting type, for which a particular meeting is an instance, and the calendar used to schedule the meeting type. [Table 123: Meeting Calendar and Meeting Type Permissions](#) summarizes your permissions based on the interaction of calendar and meeting type permissions.

Table 123: Meeting Calendar and Meeting Type Permissions

Meeting Calendar Permission	Meeting Type Permission	User Access
None		Cannot open meeting.
Read	Full	Open meeting in Read Only mode. User can upload and download documents, but not delete documents.
	Read	Open meeting in Read Only mode. User can upload, download, and view documents, but not delete documents.
	None	Cannot open meeting.
Full	Full	Open meeting and perform all operations.
	Read	Open meeting in Read Only mode. User can upload, download, and view documents, but not delete documents.
	None	Cannot open meeting.

To set or modify meeting type permissions

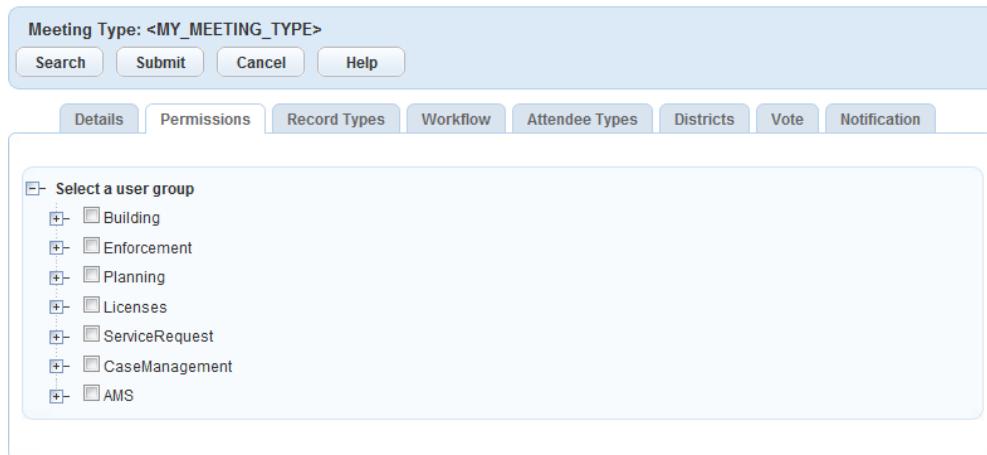
1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
2. Select the meeting type you want to modify.
 - Navigate to the meeting type from the navigation tree in the calendar administration portlet.
 - Use search to find the meeting type of interest ([Finding a Meeting Type](#)).
3. Click the **Permissions** tab.

Civic Platform displays the meeting permissions portlet with current group permissions.

Type	Module	Name	Access
Group	Enforcement	EnforcementAdminDemo	Full ▾
Group	Enforcement	EnforcementManager	Full ▾
Group	Enforcement	EnforcementOperator...	Full ▾
Group	Enforcement	EnforcementPublicUser	Full ▾
Group	Enforcement	Operators-Officers	Full ▾

4. Assign a new permission.
 - a. Click **Assign**.

Civic Platform displays the modules for which you can assign group permission.



- b. Expand the modules to find the group(s) for which you want to assign a permission.
- c. Select the group(s) and select permission from the drop-down list.
- d. Click **Submit**.



Note:

By default, Civic Platform sets the permission to Full for the newly assigned group. You can modify this permission depending on your business requirements.

5. Modify an existing permission.
 - a. Select the group for which you want to modify a permission.
 - b. Select a new permission from the drop-down list.
 - c. Click **Submit**.
6. Delete a group permission.
 - a. Select the group for which you want to remove all permission.
 - b. Click **Delete**.

Civic Platform removes the group from the list.

Setting or Removing Record Type Associations

You can associate or disassociate one or more record types with a meeting type. When you schedule a meeting of a particular meeting type, you select instances of the associated record types to be the agenda items for your meeting.

Use Case Example

You create a meeting type named Review and associate building records with that meeting type. When you schedule a meeting and designate it as a Review meeting type, you can link building records to the meeting as agenda items.

To set or remove record type associations

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
2. Select the meeting type you want to modify.
 - Navigate to the meeting type from the navigation tree in the calendar administration portlet.

- Use search to find the meeting type of interest ([Finding a Meeting Type](#)).

**Note:**

If you do not associate a record type with the meeting type, meeting organizers can add any kind of record type to the meeting.

3. Click the **Record Types** record tab.

Civic Platform displays current record type associations.

Meeting Type: EXAM 1				
Menu		Assign	Delete	Help
		Details	Permissions	Record Types
Group	Type	Subtype	Category	
Building	Building Dept	Commercial	Building Permit	
Building	Building Dept	Commercial	New	
Building	Building Dept	Commercial	Restaurant Build-Out	
Building	Building Dept	Commercial	Electrical Permit	

4. Add a new record type association.

a. Click **Assign**.

Civic Platform displays a list of record types.

Meeting Type: <MY_MEETING_TYPE>				
Search		Submit	Cancel	Help
		Details	Permissions	Record Types
Select at least one Application Type				
<ul style="list-style-type: none"> + - <input type="checkbox"/> AMS + - <input type="checkbox"/> Building + - <input type="checkbox"/> CaseManagement + - <input type="checkbox"/> Enforcement + - <input type="checkbox"/> Licenses + - <input type="checkbox"/> Planning + - <input type="checkbox"/> ServiceRequest 				

b. Select the record types you want to associate with the meeting type.

c. Click **Submit**.

5. Delete a new record type association.

a. Select the record types you want to disassociate with the meeting type.

b. Click **Delete**.

Setting or Removing Workflow Task Associations

If you associate a workflow task with a meeting type, you can write an EMSE script that automatically launches a meeting request upon completion of the associated workflow task. See the *Accela Civic Platform Scripting Guide*.

To set or remove a workflow task association

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
2. Select the meeting type you want to modify.
 - Navigate to the meeting type from the navigation tree in the calendar administration portlet.
 - Use search to find the meeting type of interest ([Finding a Meeting Type](#)).
3. Click the **Workflow** record tab.

Civic Platform displays current workflow task associations.

Workflow	Task	Status
ANNUAL MECHANICAL E...	Inspection	Pending
ANNUAL MECHANICAL E...	Inspection	Completed
ANNUAL MECHANICAL E...	Inspection	Denied

4. Click **Assign** to add a workflow task association.

Civic Platform displays the *navigation tree for the Workflow Process Task Status*.

- Select a Workflow Process\Task>Status
 - + A
 - + B
 - BLD_COMM
 - + Application Submittal
 - + Plans Distribution
 - Note
 - Revisions Received
 - Routed for Review

- a. Select the workflow items you want to associate with the meeting type.
- b. Click **Submit**.
5. Delete a workflow item association.
 - a. Select the workflow items you want to disassociate with the meeting type.
 - b. Click **Delete**.

Setting or Removing Attendee Type Associations

When you associate attendee types with a meeting type, you specify the contact type(s), licensed professional type(s), and user disciplines that should attend a meeting.

To set or remove an attendee type association

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
2. Select the meeting type you want to modify.

- Navigate to the meeting type from the navigation tree in the calendar administration portlet.
- Use search to find the meeting type of interest ([Finding a Meeting Type](#)).

3. Click the **Attendee Types tab.**

Civic Platform displays current attendee type associations, if any.

Attendee Type	Category
Applicant	Contact Type
Individual	Contact Type
Business	Contact Type
Owner	

4. Click **Assign to add an attendee type association.**

Civic Platform displays available attendee types.

- Select Attendee Type
 - + Contact Type
 - + Licensed Professional Type
 - + User Discipline

a. Select the attendee type(s) you want to associate with the meeting type.

b. Click **Submit**.

5. Delete an attendee type association.

a. Select the attendee type(s) you want to disassociate with the meeting type.

b. Click **Delete**.

Setting or Removing District Associations

When scheduling meetings, you can filter potential meeting attendees by their district associations.

To set or remove an district association

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
 2. Select the meeting type you want to modify.
 - Navigate to the meeting type from the navigation tree in the calendar administration portlet.
 - Use search to find the meeting type of interest ([Finding a Meeting Type](#)).
 3. Click the **Districts** tab.
- Civic Platform displays current district associations.

Meeting Type: <MY_MEETING_TYPE>

Menu Assign Delete Help

Details Permissions Record Types Workflow Attendee Types Districts Vote Notification

District

Bronx
 Brooklyn

4. Click **Assign** to add a district association.

Civic Platform displays available districts.

Meeting Type: <MY_MEETING_TYPE>

Menu Submit Cancel Help

Details Permissions Record Types Workflow Attendee Types Districts Vote Notification

District

Bronx
 Brooklyn
 Manhattan
 Queens
 Staten Is...

- a. Select the district(s) you want to associate with the meeting type.

- b. Click **Submit**.

5. Delete a district association.

- a. Select the district(s) you want to disassociate with the meeting type.

- b. Click **Delete**.

Setting or Removing Vote Result Options

You can set or remove voting values associated with a meeting type. By default, Civic Platform uses two vote result options; Accept and Reject.

To set or remove a voting value association

- Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
 - Select the meeting type you want to modify.
 - Navigate to the meeting type from the navigation tree in the calendar administration portlet.
 - Use search to find the meeting type of interest ([Finding a Meeting Type](#)).
 - Click the **Vote** tab.
- Civic Platform displays current vote result options.

Meeting Type: <MY_MEETING_TYPE>

Menu Save Add Delete Help

Details Permissions Record Types Workflow Attendee Types Districts Vote Notification

Vote Result Option

Abstain
 Accept
 Reject

Back 1 Next

4. Click **Add** to add a voting option.

Civic Platform displays a dialog to enter a voting option.

Meeting Type:

Menu Submit Reset Cancel Help

Details Permissions Record Types Workflow Attendee Types Districts Vote Notification

Vote Result Option *

- a. Enter a vote result option.
 - b. Click **Submit**.
5. Delete a vote result option.
- a. Select the vote result option(s) you want to remove.
 - b. Click **Submit**.

Setting Notification Template Associations

Civic Platform supports the ability to send email notifications to contacts on a case or license. You can also send notifications to internal staff not specifically related to a case, for example, the hearing officer.

To set notification template associations

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
2. Select the meeting type you want to modify.
 - Navigate to the meeting type from the navigation tree in the calendar administration portlet.
 - Use search to find the meeting type of interest ([Finding a Meeting Type](#)).
3. Click the **Notification** tab.

Civic Platform displays the dialog to manage notification template associations.

The screenshot shows a 'Meeting Type' configuration page for a specific meeting type. At the top, there are buttons for 'Menu', 'Save', and 'Help'. Below these are tabs for 'Details', 'Permissions', 'Record Types', 'Workflow', 'Attendee Types', 'Districts', 'Vote', and 'Notification'. The 'Notification' tab is selected. A table titled 'Action' lists seven types of meetings: 'New Meeting', 'Update Meeting', 'Cancel Meeting', 'Reject Meeting', and three variations of each (Internal/External Users). For each action, there is a dropdown for 'Users' and another for 'Notification Template'. To the right of the table, there are 'View Detail' links for each row.

Action	Users	Notification Template	
New Meeting	Internal Users	--Select--	View Detail
New Meeting	External Users	--Select--	View Detail
Update Meeting	Internal Users	--Select--	View Detail
Update Meeting	External Users	--Select--	View Detail
Cancel Meeting	Internal Users	--Select--	View Detail
Cancel Meeting	External Users	--Select--	View Detail
Reject Meeting	Responsible Person	--Select--	View Detail

4. Select the notification template you want to associate with each combination of action and user. If required, click the **View Detail** link to view the notification template. See [Working with Communication Manager](#) for information on modifying notification templates.
5. Click **Save**.

Deleting Meeting Types

You can delete meeting types as necessary. For example, your agency might set up a temporary meeting type that you delete after the scheduled meeting occurs. When you delete a meeting type, Civic Platform sets the meeting type to inactive. Civic Platform does not remove the meeting type from the database.

To delete a meeting type

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
2. Select the meeting type you want to delete.
 - Navigate to the meeting type from the navigation tree in the calendar administration portlet.
 - Use search to find the meeting type of interest ([Finding a Meeting Type](#)).

The screenshot shows a 'Meeting Type Maintenance' interface. At the top, there are buttons for 'Menu', 'Search', 'New', 'Delete', and 'Help'. Below these is a table with columns: 'Meeting Type ▲', 'Description', 'Status', 'Meeting Type Status Group', and 'Template'. There are two rows: one for '**<MY_MEETING_TYPE>**' which is 'generic meeting type' and 'Active', and another for 'PLANNING COMMIS...' which is 'Planning ...' and 'Active'. The first row has a checked checkbox in the 'Meeting Type' column.

Meeting Type ▲	Description	Status	Meeting Type Status Group	Template
<input checked="" type="checkbox"/> <MY_MEETING_TYPE>	generic meeting type	Active		
<input type="checkbox"/> PLANNING COMMIS...		Active	Planning ...	

3. In the top half of the calendar details portlet, select the meeting type you want to delete.
4. Click **Delete**.

Setting Up and Maintaining Supervisors

You can assign a user supervisory rights. After you assign a user supervisory rights, you can add users to the supervisor's team and create a master calendar. A master calendar allows supervisors to review team member assignments and manage workflow.

If you are a supervisor, you have the ability to view unassigned inspections and make inspection assignments.

Topics:

- [Assigning or Removing Supervisory Rights](#)
- [Setting Up and Maintaining Supervisor Teams](#)
- [Creating Master Calendars](#)

Assigning or Removing Supervisory Rights

To assign a user supervisory rights

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
2. Click the **Supervisor Maintenance** node from the navigation tree.

Civic Platform displays a list of supervisors.

The screenshot shows a table titled "Supervisor Maintenance" with columns "Name" and "Type". There are five rows of data:

Name	Type
BuildingAdmin	Group
Accela Administr...	User
Asset Administr...	User
Building Admin	User

3. Click **Assign** to make a user or group a supervisor.

Civic Platform displays the list of users and groups, per module.

The screenshot shows a "Group:BuildingAdmin" page with "Search", "Submit", "Cancel", and "Help" buttons. Below the buttons is a navigation bar with "My Team" and "Master Calendar" tabs. The main area displays a hierarchical tree under "User Group":

- Building
 - Enforcement
 - EnforcementAdmin (selected)
 - Accela Administrator
 - Enforcement Admin
 - EnforcementDailyUser
 - EnforcementPublicUser
- Planning
- Licenses
- ServiceRequest
- CaseManagement
- AMS

- a. Select the user(s) and group(s) you want to make supervisors.
 - b. Click **Submit**.
4. Remove a supervisor.

- a. Select the user(s) and groups (s) you want to remove as supervisors.
 - b. Click **Delete**.
 5. Click **Submit**.
- Civic Platform adds the group(s) or user(s) to the list of supervisors.

Setting Up and Maintaining Supervisor Teams

To set up and maintain a supervisor team

1. Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
 2. Click the **Supervisor Maintenance** node from the navigation tree to list all supervisors or navigate the tree to select a specific user or a specific group supervisor.
- Civic Platform displays all the defined supervisors or the specific supervisor selected.

Name	Type
Asset Administr...	User

Name	Type
0 record(s) found.	

3. Select the supervisor for which you want to add or remove team members.
4. Click **My Team** tab.
5. Click **Assign**.

Civic Platform displays the list of users and groups, per module.

The screenshot shows a navigation tree titled 'User Group'. Under 'Enforcement', the 'EnforcementAdmin' node is selected, indicated by a checked checkbox. Other nodes in the tree include 'Building', 'Planning', 'Licensing', 'ServiceRequest', 'CaseManagement', and 'AMS'. There are also nodes for 'Accela Administrator' and 'Enforcement Admin' under 'EnforcementAdmin'.

- Select the user(s) and groups (s) to add to the supervisor team.

- Click Submit.**

Civic Platform adds the selected user(s) and group(s).

The screenshot shows a table with three records added successfully. The columns are 'Name' and 'Type'. The data rows are:

	Name	Type
<input type="checkbox"/>	Accela Administr...	User
<input type="checkbox"/>	Asset Administr...	User
<input type="checkbox"/>	Building Admin	User

- Remove a supervisor team member.

- Select the user(s) and groups (s) you want to remove from the supervisor team.

- Click Delete.**

Civic Platform removes the selected user(s) and group(s).

Creating Master Calendars

You can create a master calendar that merges multiple calendars into a single calendar view. A master calendar makes it easier for supervisors to avoid conflicts when scheduling their team's work assignments.

To create a master calendar

- Access the Calendar Administration portlet ([Accessing the Calendar Administration Portlet](#)).
 - Click the **Supervisor Maintenance** node from the navigation tree to list all supervisors or navigate the tree to select a specific user or a specific group supervisor.
- Civic Platform displays all the defined supervisors or the specific supervisor selected.

The screenshot shows the Asset Administrator interface. On the left, a navigation tree includes options like Calendar by Type, Meeting Type Maintenance, Supervisor Maintenance, Building, Enforcement, Planning, Licenses, ServiceRequest, CaseManagement, and AMS. Under Supervisor Maintenance, 'BuildingAdmin' is expanded, showing 'Accela Administrator' and 'Asset Administrator'. Under 'Asset Administrator', there is a sub-node 'Building Admin'. In the main panel, under 'Supervisor', a table lists one record: 'Asset Administr...' of type 'User'. Below this, under 'User: Asset Administrator', the 'Master Calendar' tab is selected, showing a table with no records found.

3. Select the supervisor for which you want to create a master calendar.

4. Click the **Master Calendar** tab.

Civic Platform displays currently assigned master calendars.

The screenshot shows the 'User: Accela Administrator' page. The 'Master Calendar' tab is selected. A table lists two master calendars: 'ACA_Residential_Inspec...' and 'ACA_PME_Inspections', both of type 'INSPECTION' and status 'Active'.

5. Add calendar(s) to your master calendar.

a. Click **Look Up**.

Civic Platform displays the calendar search form.

The screenshot shows the 'Calendar Item' search form. It includes fields for 'Calendar Name' (text input), '# Scheduling Attempts' (text input), 'Status' (dropdown menu with 'Active' option), '# Units Allocated per Day' (text input), and 'Type' (dropdown menu with 'Select-' option).

b. Complete the fields on the form ([Table 124: Calendar Search Fields](#)).

Table 124: Calendar Search Fields

# Scheduling Attempts	Enter the number of scheduling attempts defined for the calendar you want to find.
# Units Allocated per Day	Enter the number of units scheduled per day for the calendar you want to find.
Calendar Name	Enter the distinct name for the calendar you want to find.
Status	Select the status of the calendar you want to find from this drop-down list. You can select Active or Inactive.

Type	Select the type of calendar you want to find. You can select Meeting or Inspection.
------	---

c. Click **Submit**.

Civic Platform displays calendars that match the search criteria.

Calendar Name	Type	Status
ACA_PME_Inspections	INSPECTION	Active
ACA_Residential_Inspec...	INSPECTION	Active
ACA_Commercial_Inspect...	INSPECTION	Active
ACA_DEFAULT_INSPECTION	INSPECTION	Active

d. Select the calendar(s) you want to add to your master calendar.

e. Click **Select**.

Civic Platform adds the calendar to your master calendar.

6. Remove calendar(s) from your master calendar.

a. Select the calendar.

b. Click **Delete**.

Civic Platform removes the calendar from your master calendar.

Configuring Meeting Email Notifications

You can configure meeting email notifications so that meeting attendees receive a notice upon scheduling, changing, rescheduling, or cancelling a meeting.

To configure meeting email notifications

1. Access the Content Customize portlet ([Navigating to the Setup Portlet](#)).

2. Configure the four message types described below:

EMAIL_NOTICE_MEETING

This is the subject line for the meeting notice email. Civic Platform sends this email when a user schedules a meeting.

You can configure this email subject to include details provided by email subject and email body variables ([Table 125: Meeting Notice Email Message Subject Variables](#) and [Table 126: Meeting Notice Email Message Body Variables](#)).

EMAIL_NOTICE_MEETING_CHANGE

This is the subject line for the meeting change notice email. Civic Platform sends this email when a user changes a scheduled meeting.

You can configure this email subject to include details provided by email subject and email body variables ([Table 125: Meeting Notice Email Message Subject Variables](#) and [Table 126: Meeting Notice Email Message Body Variables](#)).

EMAIL_NOTICE_MEETING_RESCHEDULE

This is the subject line for the meeting reschedule notice email. Civic Platform sends this email when a user changes a scheduled meeting.

You can configure this email subject to include details provided by email subject and email body variables ([Table 125: Meeting Notice Email Message Subject Variables](#) and [Table 126: Meeting Notice Email Message Body Variables](#)).

EMAIL_NOTICE_MEETING_CANCELLATION

This is the subject line for the meeting cancellation notice email. Civic Platform sends this email when a user changes a scheduled meeting.

You can configure this email subject to include details provided by email subject and email body variables ([Table 125: Meeting Notice Email Message Subject Variables](#) and [Table 126: Meeting Notice Email Message Body Variables](#)).

Table 125: Meeting Notice Email Message Subject Variables

\$AGENCY-DEPARTMENTS\$	The agency department responsible for the hearing, such as a planning commission or land use appeals board.
\$ALTID\$	The alternate identification number for the application.
\$NEW_HEARING_BODY\$	The new hearing body members assigned to a hearing.
\$NEW_STATUS\$	The new hearing status.
\$ORIG_HEARING_BODY\$	The original hearing body members assigned to a hearing.
\$	
\$ORIG_STATUS\$	The original hearing status.
\$PERMITID\$	The application identification number.

Table 126: Meeting Notice Email Message Body Variables

\$AGENCY-DEPARTMENTS\$	The agency department responsible for the hearing, such as a Planning Commission.
\$NEW_DURATION\$	The updated hearing duration.
\$NEW_END_TIME\$	The updated hearing end time.
\$NEW_HEARING_BODY\$	The updated hearing body.
\$NEW_HEARING_DATE\$	The updated hearing date.
\$NEW_LOCATION\$	The updated hearing location.
\$NEW_MAX_ITEM\$	The updated hearing max item. The max item value is the number of applications reviewable at one hearing.
\$NEW_NOTICE_DATE\$	The updated hearing notice date.
\$NEW_START_TIME\$	The updated hearing start time.
\$ORIG_DURATION\$	The original length of the scheduled hearing.
\$ORIG_END_TIME\$	The original end time of the scheduled hearing.
\$ORIG_HEARING_BODY\$	The original committee members/ individuals scheduled to attend the hearing.
\$	
\$ORIG_HEARING_DATE\$	The original hearing date.
\$	

\$ORIG_LOCATION\$	The original hearing location.
\$ORIG_MAX_ITEMS\$	The original hearing max item. The max item value is the number of applications reviewable at one hearing.
\$ORIG_NOTICE_DATE\$	The original hearing notice date.
\$ORIG_START_TIME\$	The original hearing start time.
\$RECIPIENT_NAME\$	The primary applicant associated with the application scheduled for a hearing review.
\$SENDER_FIRST_NAME	The email sender's first name.
\$	
\$SENDER_LAST_NAME\$	The email sender's last name.
\$SENDER_TITLE\$	The email sender's official title.

Scenarios

Topics

- [Setting Up Inspection Calendars for Public Users](#)
- [Creating an Inspection Calendar with 30 Minute Intervals](#)
- [Setting Up Automatic Inspection Scheduling](#)

Setting Up Inspection Calendars for Public Users

This procedure consolidates the steps documented in this guide and in the Citizen Access Administrator Guide to set up inspection calendars for public users.

To set up inspection calendars for public users

1. Set up public users calendars in Civic Platform.
 - a. From the calendar portlet **Details** tab, select **Enable for ACA** ([Calendar Detail Field Descriptions](#)).
 - b. If you have more than one Citizen Access inspection calendar, from the calendar portlet **Details** tab, set the **Priority** field ([Calendar Detail Field Descriptions](#)).
 - c. From the calendar portlet **Inspections Type** tab, enter Citizen Access related parameters ([Inspection Scheduling Fields for Citizen Access](#)).
2. Set up public user calendars in Citizen Access.
 - a. From the Inspections section of the Module Settings page in Citizen Access Setup, set user permissions for Citizen Access calendars ([Citizen Access Settings for Inspection Scheduling](#)). See "Inspections" in the *Citizen Access Administrator Guide*.

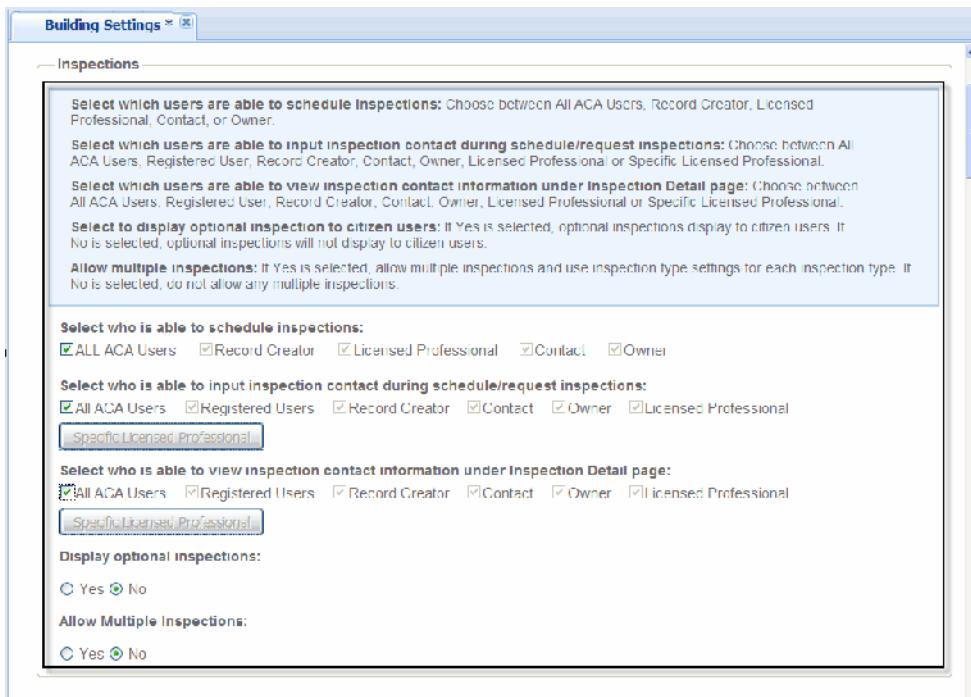


Figure 35: Citizen Access Settings for Inspection Scheduling

- b. From the Application Status section of Module Settings page in Citizen Access Setup, restrict public users' scheduling permissions to certain inspection types for a particular record status, if required ([Citizen Access for Restricting Inspection Scheduling](#)). See also "Application Status" in the Citizen Access Administrator Guide.

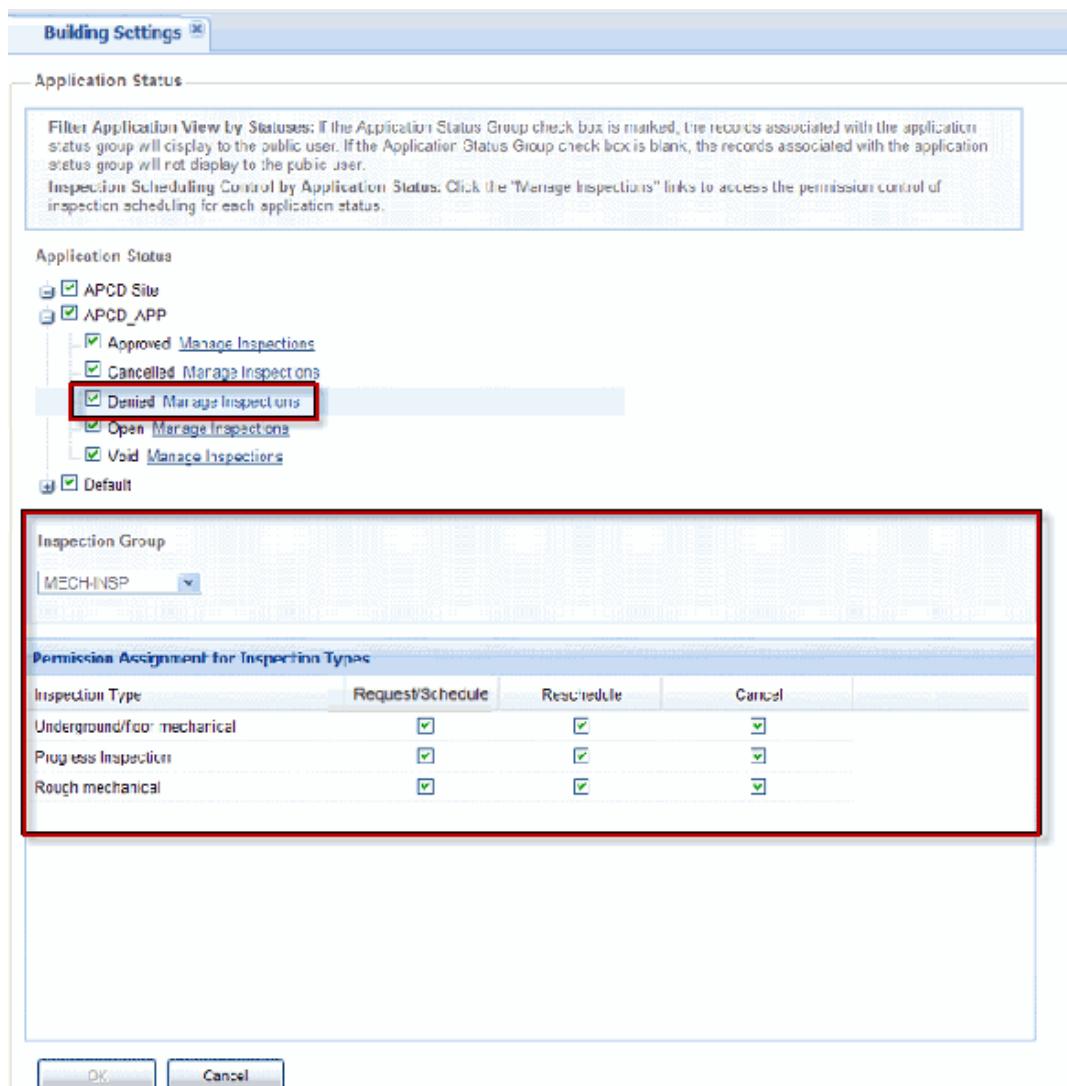


Figure 36: Citizen Access for Restricting Inspection Scheduling

Creating an Inspection Calendar with 30 Minute Intervals

If your agency only conducts inspections from 8:00 am to 12:00 pm, you can create a calendar with available inspection times from 8:00 am to 12:00 pm. Configuring your calendars this way enables you to direct users only to the calendar times available for inspection scheduling.

To create a Citizen Access Calendar with 30 minute inspection intervals

1. Create a new inspection type calendar with 30 minute time blocks ([Creating a Calendar](#)).
Use the values in [Citizen Access Inspection Type Calendar Criteria](#).

Calendar

Menu ▾ Submit Reset Cancel Help

Calendar Name *	Type *	# Scheduling Attempts *
My_Inspection_Calendar	INSPECTION	0
Comments	Status *	# Units Allocated per Day *
<input type="text"/>	Active	16
check spelling		
Priority *	Default Block *	Schedule Cut-off Time AM/PM
<input type="text" value="1"/>	30 Minute	<input type="text"/> : <input type="text"/> <input type="text"/> AM/PM
Schedule after Cut-off	<input type="checkbox"/> Enable for ACA	
--Select--	<input type="checkbox"/> Schedule # Of Days Out	
<input type="checkbox"/> Hide Inspection Times in ACA		

Table 127: Citizen Access Inspection Type Calendar Criteria

# Scheduling Attempts	0
# Units Allocated per day	16
Default Block	30 minutes
Priority	1
Status	Active
Type	Inspection Type

2. Go to the **Daily** tab for your newly created calendar and create a new daily calendar item that defines AM inspection times with the criteria listed below. The inspection units correspond to the 30 minute inspection intervals established for the calendar.

Calendar Item	AM Inspection Range
End-Time	12:00 PM
Start-Time	8:00 AM
Type	Inspection

For example, if inspections are only available for scheduling from 8:00 am to 12:00 pm, the Units Displayed in ACA box auto-populates with 8 inspection units.

Calendar Name: My_Inspection_Calendar

Menu New Delete Help

Calendar Daily Weekly Monthly

February 13, 2013

Start Time	End Time	Type	Calendar Item
0 record(s) found.			

Calendar Item

Item

Date * 02/13/2013

Start Time * 08 : 00 AM

Type * Inspection

Calendar Item * AM Inspection Range

Recurrence:

- None
- Repeat every day(s)
- Repeat every week(s) on
 - Sunday
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
- Repeat every month(s) on First
 - Sunday
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
- Repeat every year(s)

Comments

Units Displayed in ACA 8

[check spelling](#)

3. Create a new daily calendar item to block out a lunch hour and populate the fields with the criteria listed below:

Calendar Item	Lunch
End-Time	1:00 PM
Start-Time	12:00 PM
Type	Block-out

4. Create a daily calendar item that defines PM inspection times with the criteria listed below.

Calendar Item	PM Inspection Range
End-Time	4:00 PM
Start-Time	1:00 PM
Type	Inspection

Civic Platform displays the three calendar items in the Daily tab.

The screenshot shows a calendar interface titled "My_Inspection_Calendar". At the top, there are buttons for "Menu", "New", "Delete", and "Help". Below these are tabs for "Calendar", "Daily", "Weekly", and "Monthly", with "Calendar" being the active tab. The date "February 13, 2013" is displayed. A table lists inspection events:

Start Time	End Time	Type	Calendar Item
08:00 AM	12:00 PM	Inspection	AM Inspection Range
12:00 PM	01:00 PM	Block Out	Lunch
01:00 PM	04:00 PM	Inspection	PM Inspection Range

5. Log in to Citizen Access and schedule an inspection for an application.

The Citizen Access Calendar displays inspection time blocks in 30 minute intervals.

The screenshot shows a "Request an inspection" form. It includes fields for "T-Pole" (1007 N HILLCREST Dr, SUNRISE, AZ 86004) and "Number: 08ELE-00000-00006". Below this, instructions say "To continue, select an appointment date and time range by clicking a link on the calendar below:". A calendar for October 2008 through January 2009 is shown, with October 16 highlighted. Available times for Thursday, Oct 16, 2008, are listed under "Morning (08:00 AM - 12:00 PM)" and "Afternoon (01:00 PM - 04:00 PM)". A "Continue" button is at the bottom.

Setting Up Automatic Inspection Scheduling

You can set up Civic Platform to automatically schedule inspections upon application submittal. When you automatically schedule inspections, Civic Platform verifies inspector profiles against inspection types and assigns the appropriate inspector. Inspector assignments vary depending on geographic district, inspector discipline, calendar permissions, and workload availability.

When you set up inspection types and inspector profiles for automatic scheduling, Civic Platform automatically assigns the inspector whose profile best matches the inspection type you are scheduling.



Note:

If you do not set up inspector profiles, Civic Platform attempts to balance workloads, but might over book at any time.

You can manually change automatically scheduled inspection assignments through the Civic Platform inspection calendars ([Setting Up and Maintaining Calendars](#)). If you automatically schedule inspections in Citizen Access or Accela Interactive Voice Response, you do not have the option to modify inspector assignments.

To set up automatic inspection scheduling

1. Determine the inspection type you want to use for automatic inspection scheduling ([Managing Inspection Groups](#)).
 2. Determine the shortest length of time it takes to complete an inspection, across all inspection types, and consider this time interval as one unit.
For example, you might determine that the unit value equals the duration of electrical inspections, 30 minutes.
 3. Determine the number of units (time segments) required to complete the inspection type of interest.
If one unit equals 30 minutes, for example, an hour-long inspection type equals two units and a ninety-minute inspection type equals three units.
 4. Set up the inspection types in Classic Administration.
- a. Access the set up form for inspection groups ([Classic Administration > Admin Tools > Inspection > Inspection](#)).
 - b. Specify a unit value for all the inspection types subject to automatic scheduling ([Inspection Unit Values](#)).

Inspection - Edit
Use this form to set up an Inspection Group.

Inspection Type	Guide Sheet Group	Result Group	Required/Optional	ACA Inspection Display	ACA Multi-Inspection Schedule	Auto Assign	Unit
Flow 1	FOLLOW_UP	RMA_CM	Optional	Yes	No	No	2
Allow Failed Guideshow Items	Yes						
Capture and carry over failed guide sheet items	None						
Reschedule Restriction:	<input checked="" type="radio"/> No Restriction	<input type="radio"/> Hours Prior	1	<input type="radio"/> Days Prior	0	at	
Cancel Restriction:	<input checked="" type="radio"/> No Restriction	<input type="radio"/> Hours Prior	1	<input type="radio"/> Days Prior	0	at	
Flow 2	FOLLOW_UP	RMA_CM	Optional	Yes	No	No	1
Allow Failed Guideshow Items	Yes						
Capture and carry over failed guide sheet items	None						
Reschedule Restriction:	<input checked="" type="radio"/> No Restriction	<input type="radio"/> Hours Prior	1	<input type="radio"/> Days Prior	0	at	
Cancel Restriction:	<input checked="" type="radio"/> No Restriction	<input type="radio"/> Hours Prior	1	<input type="radio"/> Days Prior	0	at	

[Update](#) [Add Type](#) [Cancel](#)

Figure 37: Inspection Unit Values

[Inspection Type Units](#) illustrates example settings for different inspection types.

Table 128: Inspection Type Units

Inspection Type	Length	Unit Value (1 unit = 30 minutes)
Electrical inspection	30 minutes	1 unit
Plumbing inspection	1 hour	2 units
Water Heater inspection	45 minutes	1.5 units

- c. Set the **Auto Assign** drop-down list value to Yes for each of the inspection types you want to subject to automatic scheduling ([Inspection Type Configuration](#)).

Inspection - Edit
Use this form to set up an Inspection Group.

Inspection Type	Guide Sheet Group	Result Group	Required/Optional	ACA Inspection Display	ACA Multi-Inspection Schedule	Auto Assign
Flow 1	FOLLCW_IIP	Electrical	Optional	Yes	No	Yes
Allow Failed Guideshow Items: Yes						
Capture and carry over failed guide sheet items: None						
Department						
Reschedule Restriction: <input checked="" type="radio"/> No Restriction <input type="radio"/> Hours Prior 1 <input type="radio"/> Days Prior 0 at 00:00 AM						
Cancel Restriction: <input checked="" type="radio"/> No Restriction <input type="radio"/> Hours Prior 1 <input type="radio"/> Days Prior 0 at 00:00 AM						
Flow 2	FOLLOW_UP	Building	Optional	Yes	No	Yes
Allow Failed Guideshow Items: Yes						
Capture and carry over failed guide sheet items: None						
Department						
Reschedule Restriction: <input checked="" type="radio"/> No Restriction <input type="radio"/> Hours Prior 1 <input type="radio"/> Days Prior 0 at 00:00 AM						
Cancel Restriction: <input checked="" type="radio"/> No Restriction <input type="radio"/> Hours Prior 1 <input type="radio"/> Days Prior 0 at 00:00 AM						

[Update](#) [Add Type](#) [Cancel](#)

Figure 38: Inspection Type Configuration

5. For each inspector that want to automatically schedule, set up the daily capacity to do inspection work.
 - a. Access the set up form for user profiles (**Classic Administration > Admin Tools > User Profile > User**).
 - b. Select a user.

Civic Platform displays user details.

User - Edit

Use this form to edit User.

<input checked="" type="radio"/> AA User <input type="radio"/> External User
User Login ID: JOE INSPECTOR
New Password:
Confirm Password:
Distinguished Name:
User Name: First Joe Mi Last Inspector
Initials:
Display Initials in ACA: <input type="checkbox"/>
Title:
Employee ID:
Email:
Phone Number:
Department * : Building
Account Disable Time Frame: 90 (days)
Password Timeout Time Frame: 90 (days)
Password Change: <input checked="" type="radio"/> By User <input type="radio"/> By Administrator
User must change Password at next Logon: <input checked="" type="radio"/> Yes <input type="radio"/> No
Billing Rate: 50 (\$/hour)
Daily Inspection Units: 12

- c. In the **Daily Inspection Units** field, enter the number of units you expect the inspector to complete each day.

Use the unit definition from [Inspection Unit Values](#) as the basis for determining the number of daily inspection units. For example, if an inspector has six hours available for inspections each day and each unit equals 30 minutes, the inspector can accommodate twelve units per day.

6. For each inspector that you want to automatically schedule, set up their applicable districts and their disciplines.

- a. Access the set up form for user profiles ([Classic Administration > Admin Tools > User Profile > User](#)).

Civic Platform displays the user profiles page.

Edit	Full Name	User Login ID	Status	External User
• Daily, Service Request	SRDAILY	ENABLE	No	User Profile
• Inspector, Building	BINSPECTOR	DISABLE	No	User Profile
• Inspector, Code	CINSPECTOR	DISABLE	No	User Profile
• Inspector, Joe	JOE INSPECTOR	ENABLE	No	User Profile

◀ P. 1 2 ▶

[Search](#)

or

[Add](#)

[New User](#)

- b. From the list of users, click the User Profile link.

Civic Platform displays the user profiles page.

User Information

User Full Name: Inspector, Joe
User Login ID: JOE INSPECTOR
Status: [ENABLE](#)

Daily Inspection Units:

Inspector Status: Enable Disable

[Submit](#)

Districts

Service: CCSF_AGIS [GIS](#) [Select District](#)

Bronx	Delete
Brooklyn	Delete

Disciplines

User Discipline Name

Plumbing	Delete
Water	Delete

Inspector Calendars

User Group Level

No Records Found

User Level

No Records Found

- c. Edit the user profile to include the districts and disciplines that apply to the inspector.

[Inspector Profile Examples](#) illustrates examples of how you can configure inspector profiles.

Table 129: Inspector Profile Examples

User Name	Group	District	Daily Inspection Units	Department	Discipline
Allison	Inspection	Bldg North	12	Bldg	Electrical
Matthew	Inspection	Bldg North	5	Bldg	Plumbing
Greg	Inspection	Bldg North	15	Bldg	Water Heater

7. Set up the inspection type calendar ([Setting Up and Maintaining Calendars](#)).

- a. Set up the calendar block-out times ([Calendar Detail Field Descriptions](#)). Block-out times are the days and times during which you cannot schedule inspections, such as holidays and weekends.
- b. Set up the number of units per day to allocate for inspections ([Calendar Detail Field Descriptions](#)). Best practice is to match the time you ascribed to the inspection unit value ([Inspection Unit Values](#)), 30 minutes for example, with the time setting in the **Default Block** field.

The screenshot shows a 'Calendar' configuration page. At the top are buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. Below are several input fields and dropdown menus:

- Calendar Name ***: My_Inspection_Calendar
- Type ***: INSPECTION
- Status ***: Active
- # Scheduling Attempts ***: 0
- # Units Allocated per Day ***: 16
- Priority ***: 1
- Default Block ***: 30 Minute
- Schedule Cut-off Time AM/PM**: (dropdown menus for hours and minutes)
- Schedule # Of Days Out**: (dropdown menu)
- Schedule after Cut-off**: -Select-
- Enable for ACA**:
- Hide Inspection Times in ACA**:

To determine the number of units per day to allocate, add the daily inspector units of all inspectors assigned to a calendar. For example, if the inspectors in [Inspector Profile Examples](#) have a total of 32 inspection units per day. If you assign Matthew, an inspector with 5 daily inspection units, and Greg, an inspector with 15 daily inspection units, to the same calendar, you should set the calendar units at 20 units per day.

c. Set up districts and inspection types ([Assigning Districts](#) and [Assigning and Removing Inspection Types](#)).

For example, if you have a mechanical inspection type calendar, assign the districts that apply the calendar, as well as assigning the mechanical inspection types. When you automatically schedule inspections for inspection types associated with a calendar, Civic Platform first attempts to schedule the inspection on the associated calendar for the district in which the inspection record is registered.

d. Assign inspector permission ([Assigning Calendar Permissions](#)).

Civic Platform assigns inspectors to calendar events with district assignments and discipline assignments that match the districts and disciplines in the inspector's profile ([Inspector Profile Examples](#)).

Managing Calendar Items through the Calendar Portlet

Administrators access calendar functionality through the Setup portlet ([Figure 39: Accessing Calendars through the Setup Portlet](#)) or a link to the Calendar portlet on the main console. End users can only access calendar functionality through the link on the main console.

Calendar functionality accessed through the Setup portlet differs from calendar functionality accessed through the main console. This section addresses scheduling of calendar events with the Calendar portlet that you access from the Setup portlet. The *Accela Civic Platform User Guide* provides information on scheduling calendar events with the Calendar portlet you access from the main console.

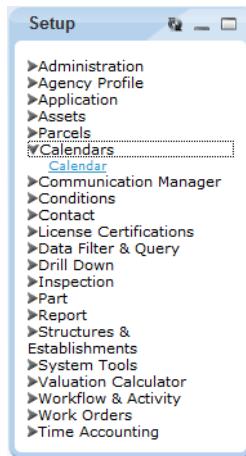


Figure 39: Accessing Calendars through the Setup Portlet

Scheduling Inspections from a Record List

Civic Platform provides the capability to schedule inspections directly from a record list, without having to navigate to the calendars area.

To schedule an inspection from a record list

1. Access the Building Permits portlet ([Navigating to the Setup Portlet](#)).
2. Select the record for which you want to schedule an inspection.
Civic Platform displays the application details in the detail portlet.
3. From the details portlet, click the **Calendar** secondary tab.
Civic Platform displays all event type and inspection type calendars for the current month.
4. Use the drop-down lists to change the month and year.
5. Use the **Show** drop-down list to filter event type or inspection type calendars.
6. Click the **New Inspection** button., Civic Platform displays the inspection type list portlet for the application.
7. Select an inspection you want to schedule for the application.
8. Click **Submit**.
Civic Platform displays the inspection schedule page.
9. Specify the inspection scheduling information.

10. Click Submit.

Civic Platform displays a message indicating you scheduled the inspection successfully.

Social Media Integrations

Civic Platform and Citizen Access provide integrated functionality from two industry leaders in social media: Facebook and Twitter. This feature enables public users to “like” and “tweet” records, automatically publishing certain record details – that you specify in the configuration process – on their Facebook and Twitter pages.

This section guides you through each step in the process:

- Setting up Facebook and Twitter accounts to properly communicate with Accela
- Configuring the scripts and security settings that enable public users to share Accela content on Facebook and Twitter
- Configuring the social media functionality of “liking” and “tweeting” records from Accela to Facebook and Twitter.

Because this feature uses HTTP Secure (HTTPS), you must have an HTTPS-enabled security certificate. HTTPS is a communications protocol that layers specific security measures on top of applications that you deploy over the internet. HTTPS adds the security capabilities of SSL/TLS to standard HTTP communications, providing website authentication and protecting against common types of security risks.

Because the Citizen Access web server uses TinyURL functionality, you must ensure that the web server can successfully connect to www.tinyurl.com before you begin. For example, verify that your firewall settings on the web server do not prohibit access to the tinyurl website.

Click a topic title below for full details.

Related Information

[Example Use Cases](#)

[Setting Up the Facebook Integration](#)

[Setting Up the Twitter Integration](#)

[Configuring Social Media Permissions and Comments](#)

Example Use Cases

A construction contractor and avid social media user is building an addition onto his client’s home. He goes to his city’s Facebook page and clicks the ACA-Facebook app, completes the permit application, and then shares the information on his Facebook page, tagging his client and generating “likes” from his and his client’s Facebook friends.

Public users apply for permits and post the information to Facebook and Twitter by clicking “like” and “tweet,” keeping their friends and other citizens in the loop on new construction projects, businesses, and land use information in their area.

Setting Up the Facebook Integration

Before you can begin using the Facebook integration you must follow each of the procedures listed below. Do not skip any steps unless they are optional.

Topics:

- [Creating Your Agency ACA-Facebook App](#)
- [Enabling Authenticated Referrals](#)
- [Adding Your Facebook App to Your Agency Page](#)
- [Customizing the Facebook Login and Landing Pages](#)
- [Configuring Social Media Permissions and Comments](#)

Creating Your Agency ACA-Facebook App

To enable public users to access the services available in your Citizen Access implementation from within Facebook, you must first create an ACA-Facebook app using the procedure below.

To create your agency's ACA-Facebook app

1. Go to <https://developers.facebook.com>.
2. Click Apps.



3. Login with an existing Facebook account or create a new one that you can use specifically for maintaining your Accela Facebook integration.

If you choose to create a new Facebook account for this purpose, Facebook might require you to submit a scanned government-issued ID card to verify your identity. Facebook has implemented this new security measure to protect against fraudulent activities. This security measure is not required if you log in with an established Facebook account.

4. Click Create New App or Go To App. The button you see depends on whether you have previously developed any Facebook apps.

The screenshot shows the Facebook Developers website with the 'Apps' section selected. At the top right, there is a blue button labeled '+ Create New App' with a yellow cursor icon pointing to it. Below this, there is a box titled 'Welcome to the Developer App.' containing text about building social experiences and creating apps. To the left, there is a section for 'Websites' with an icon of a laptop and two people.

The Create New App window displays.

The screenshot shows the 'Create New App' dialog box. It has fields for 'App Name' (set to 'City of Progress Citizen Access'), 'App Namespace' (set to 'Optional'), and 'Web Hosting' (checkbox checked). Below the fields is a link to agree to the Facebook Platform Policies. At the bottom are 'Continue' and 'Cancel' buttons, with a yellow cursor icon pointing to the 'Continue' button.

5. In the App Name field enter a name for your app, using this syntax:

```
<Your Agency Name> <Page Tab Name>
```

Choose a name that meets your agency's preferred nomenclature, for example, "New York State Online Services." This section uses the fictitious name "City of Progress Citizen Access" as an example.

6. The App Namespace field is optional. Leave this field blank for now; you can provide this detail later in this procedure.
7. Web Hosting is optional. Leave this option blank.
8. Click Continue.

A Security Check displays.

The screenshot shows the 'Security Check Required' dialog box. It contains a CAPTCHA text 'saYrth' and a text input box where 'saYrth' is typed. Below the input box are links for 'Can't read the text above?' and 'Text in the box:'. At the bottom are 'Submit' and 'Cancel' buttons, with a yellow cursor icon pointing to the 'Submit' button.

9. Enter the Security Check text in the box provided and Click **Submit**.
The following message displays.

Your account must be verified before you can take this action. Please verify your account by adding your mobile phone or credit card.

10. Decide whether you want to use a mobile phone or a credit card to verify your account.

If you choose the mobile phone option and you previously connected your mobile phone to a different Facebook account, you must re-establish the connection with your mobile phone on your other Facebook account. You can only associate a mobile phone number with one Facebook account at a time.

11. Click Mobile Phone or click Credit Card and complete the process of verifying your account.

12. Return to the Create New App page and click Continue.

A second and final Security Check window displays.

13. Enter the security code in the box provided and Click **Submit**.

The Apps Settings page displays.

The screenshot shows the 'App Settings' page for the 'City of Progress Citizen Access' application. The page is divided into several sections:

- Basic Info:**
 - App ID:** 409012695823671 (circled A)
 - App Secret:** 73b8bdbf1f378a606c35a95553358e47 (circled B)
 - (edit icon)** (circled C)
- Select how your app integrates with Facebook:**
 - Website with Facebook Login:** (circled D) Site URL: https://aca.dev.accela.com/facebook-aca/socialmedia/facebookportal.aspx?&fb_... (circled G)
 - App on Facebook:**
 - Canvas URL:** (circled H) https://aca.dev.accela.com/facebook-aca/socialmedia/facebookportal.aspx?&fb_... (circled S)
 - Secure Canvas URL:** (circled H) https://aca.dev.accela.com/facebook-aca/socialmedia/facebookportal.aspx?&fb_... (circled S)
 - Canvas Page:** (circled I) http://apps.facebook.com/cityofprogress
 - Page Tab:**
 - Page Tab Name:** (circled J) Citizen Access
 - Page Tab URL:** (circled J) https://aca.dev.accela.com/facebook-aca/socialmedia/facebookportal.aspx?&fb_... (circled S)
 - Secure Page Tab URL:** (circled J) https://aca.dev.accela.com/facebook-aca/socialmedia/facebookportal.aspx?&fb_... (circled S)
 - Page Tab Edit URL:** (circled K) []
 - Page Tab Image:** (circled L) (placeholder image)
 - Page Tab Width:** (circled M) Narrow (520px) Wide (810px) (circled N)

Figure 40: App Settings

14. Enter information into the following fields, which correspond to the green labels A - K in the sample screen above. Leave all other fields blank or accept the default values.

Table 130: App Settings Fields

A	Click the generic placeholder image to the left of the App Name to upload a logo for your agency. This image becomes the profile picture for your agency.
B	The App ID displays here and is a critical component of your ACA-Facebook app; you must copy and paste this App ID when you get to of Adding Your Facebook App to Your Agency Page , later in This section.

C	Click Edit Icon to upload an icon to represent your agency's ACA-Facebook app. This icon becomes the icon that users click to access Citizen Access from your agency's Facebook page.
Basic Info	
D	The Display Name field displays the name you entered in . Accept this default value.
E	In the Namespace field enter the name you want to use for the app's URL. Enter all lower case letters with no spaces or special characters. Use the following syntax: cityofprogress In this example, entering cityofprogress in the Namespace field creates the following URL: https://app.facebook.com/cityofprogress
F	In the App Domains field enter the server domain for the server where you host your Citizen Access implementation. Use the following syntax: aca.<youragency>.com If you are not sure what to enter here you can verify it by checking the URL of the login page for your Citizen Access implementation.
Select how your app interacts with Facebook	
G	Expand the Website with Facebook Login section. In the Site URL field, copy and paste the following site URL text, but change <APP_DOMAIN> in the sample below to your app domain. https://<APP_DOMAIN>/facebook-aca/socialmedia/facebookportal.aspx?&fb_source=search&ref=ts When you finish entering the site URL it should look similar to this example: https://aca.cityofprogress.accela.com/facebook-aca/socialmedia/facebookportal.aspx? &fb_source=search&ref=ts You will use this site URL again when you get to fields H and J below.
H	Expand the App on Facebook section. Copy and paste the Site URL (G) into the following fields: (H) Canvas URL (H) Secure Canvas URL
I	Expand the Page Tab section. In the Page Tab Name field, enter the text for the link to your ACA-Facebook app. The text that you enter here becomes the link users click to access Citizen Access from your agency's Facebook page. For example, you can enter Citizen Access, Online Services, or any text you prefer.
J	Copy and paste the Site URL (G) to the following fields: (J) Page Tab URL (J) Secure Page Tab URL
K	Set the Page Tab Width to Wide (810px)

15. When you finish entering items A - K, Click **Save Changes** and move on to the next procedure, [Enabling Authenticated Referrals](#).

Enabling Authenticated Referrals

Authenticated referrals is a Facebook feature that ensures all referral traffic from Facebook to your application already has a connection to Facebook. With this feature, when users come to your app they are automatically logged in and, if you configure the option, they receive a prompt to enter any permission information you configure.

This feature provides the ability for public users to log in to Citizen Access using their Facebook account credentials; Civic Platform saves the password and establishes a link between Citizen Access and their Facebook page. Public users can also choose to create a new Citizen Access account and use their Facebook credentials to set up their Citizen Access account.

After you enable Authenticated Referrals, when a new user clicks your app on Facebook they receive the Authentication prompt. This dialog requests the permissions specified in the User & Friend Permissions field described below.

To enable authenticated referrals

1. Go to <https://developers.facebook.com>.
2. Click Apps > Edit App > Auth Dialog.

The New Auth Dialog page displays.

The New Auth Dialog

Customize your auth dialog and preview the new permissions system before it goes live. Configure authenticated referrals, provide a headline, and highlight your app's timeline.

Customize

Logo:  City of Progress

Subtitle:

Description:

Privacy Policy URL:

Terms of Service URL:

Explanation for Permissions:

Default Activity Privacy:

Configure how Facebook refers users to your app

Authenticated Referrals

User & Friend Permissions:

Extended Permissions:

Auth Token Parameter:

Save Changes

3. In the User & Friend Permissions field enter email and user-birthday, as shown in the sample screen.
4. Click **Save Changes**.

Creating Your Agency Facebook Page

If your agency already has a Facebook page you can skip this section.

1. Go to <http://www.facebook.com/pages/create.php> and create a Facebook page for your agency, as follows:
2. Click Company, Organization or Institution.
3. Choose the Category: Government Organization.
4. In the Company Name field enter the name of your agency. For example, "City of Progress."
5. Click "I agree to Facebook Pages Terms."
6. Click Get Started.
7. Upload a Profile Picture and Click **Save Photo**.
8. Enter basic information about your agency and Click **Save Info**.

9. Set the Facebook Web Address for your agency and click Set Address.
10. Facebook displays your agency page.
11. Facebook prompts you to “like” your page, add a time line, and provide information to populate your new page.
12. When you finish populating your agency’s Facebook page, it displays with the Admin Panel active. Click Hide in the upper-right corner of the Admin Panel to display your page in public user mode, then move on to the following procedure.

Adding Your Facebook App to Your Agency Page

To add your Facebook App to your agency’s Facebook page:

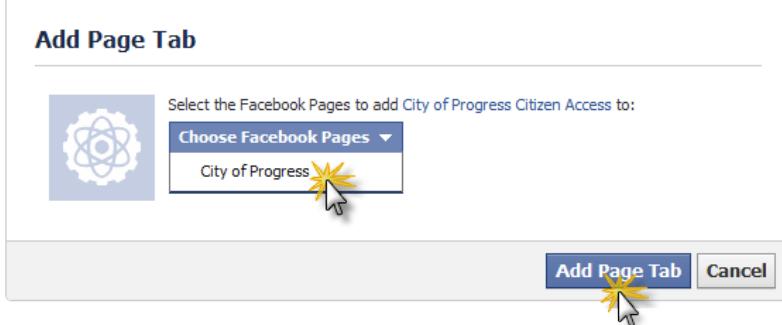
1. Using Notepad or another text editor construct a URL based on the following example.
https://www.facebook.com/dialog/pagetab?app_id=44090126958236711&next=https://aca.dev.accela.com/cityofprogress

The syntax for this URL is:

```
https://www.facebook.com/dialog/pagetab?
app_id=YOUR_APP_ID&next=YOUR ACA DOMAIN/YOUR_AGENCY'S_NAMESPACE
```

- a. Change YOUR_APP_ID to the app ID that displays in field B of [Figure 40: App Settings](#).
- b. Change YOUR ACA DOMAIN to the app domain you entered in field F of [Figure 40: App Settings](#).
- c. Change YOUR_AGENCY'S_NAMESPACE to the namespace you entered in field E of [Figure 40: App Settings](#).
2. When you finish constructing this URL copy it to your clipboard (ctrl + c).
3. Open a new browser tab and then paste the URL into the address field (ctrl + v).

The following page displays.



4. Choose your agency’s Facebook Page and then click Add Page Tab.
5. In Facebook, find your agency’s page; for example, enter City of Progress in the Search field and press enter.
6. Click the search result that matches your agency’s page.

Your Agency’s page displays with the Citizen Access app.



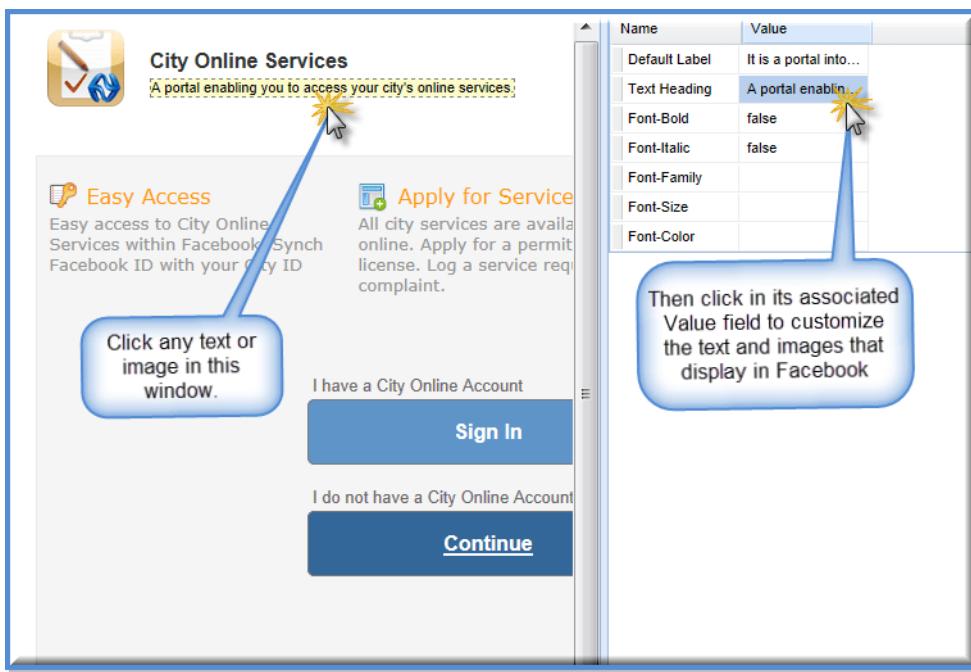
7. Click the link to your agency's ACA-Facebook app to load ACA.
The Citizen Access Login page displays.
8. Sign in with your Citizen Access credentials; Civic Platform saves the password and establishes a link between Citizen Access and your Facebook page. This one-time process establishes your login credentials. You can also choose to create a new Citizen Access account and use your Facebook credentials to set up your Citizen Access account.

Customizing the Facebook Login and Landing Pages

You can easily customize the text and icons on the login page and landing page public users see when they click the ACA-Facebook app in Facebook. This process is illustrated in the sample screen below.

To customize the Facebook Login and home pages

1. Sign in to Citizen Access Admin: Go to Civic Platform > Admin > Setup portlet > Administration > ACA Admin.
 2. Navigate to General Settings > Social Media in the left pane.
 3. Click one of these options:
 - To customize the Login page text and its icons, click Facebook Account Login in the left pane.
 - To customize the page that displays your agency's Citizen Access services, click Facebook Home Page in the left pane.
- Your Facebook app displays in Citizen Access.



- Refer to Customizing Text and Images on Web Pages in the Citizen Access Administrator Guide for detailed instructions on how to modify the text and images.

Setting Up the Twitter Integration

Civic Platform's integration with Twitter enables agency users to post Twitter comments, also known as "tweets," from within the Civic Platform interface, by triggering certain EMSE events. For example, you can configure the EMSE event, ApplicationSubmitAfter, to automatically tweet record details upon record creation.

Before you can begin using the Twitter integration you must follow each of the procedures listed below. Do not skip any steps unless they are optional.

Topics

- [Enabling Function ID 0347-Social Media](#)
- [Creating a Twitter Account for Your Agency](#)
- [Generating the Access Token Key and Secret](#)
- [Customizing the Twitter Account Name](#)
- [Configuring Social Media Permissions and Comments](#)

Enabling Function ID 0347-Social Media

Before you can configure and use this feature, you must enable it by setting Function ID 0347-Social Media. For complete instructions on setting a Function ID, refer to "Working With FIDs and Standard Choices" in the Accela Civic Platform Configuration Reference.

Creating a Twitter Account for Your Agency

Establish a Twitter account that represents your agency if your agency does not already have one. The Twitter account you create for your agency enables users to tweet information from within Civic Platform, using this agency-wide, group Twitter account.

To create an agency-wide Twitter account

1. Go to <https://dev.twitter.com>.
2. Choose a Twitter name for your agency that represents a public image that citizens can recognize and identify with your agency.
The Twitter account you configure in this step becomes the Twitter account you use for generating the access token key and secret in the next procedure.
3. Complete the registration process.

Generating the Access Token Key and Secret

Generate an access token key and an access token secret from Twitter and register them in Civic Platform. The token key and the token secret become the login credentials users enter to post Twitter messages from within Civic Platform.



Note:

All users at the same Civic Platform website share the same access token key and access token secret. Users post messages to the same Twitter account that the administrator uses to generate the access token key and access token secret.

To generate the access token key and access token secret

1. Go to **Civic Platform Administration > System Tools > Social Media**.

Civic Platform displays the Social Media administration portlet.

2. Click **Generate**.

Civic Platform displays the Access Token Generator page.

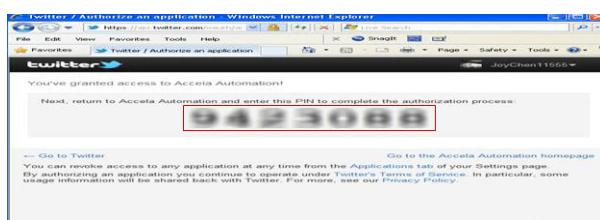
3. Click **Get PIN Code**.

Civic Platform redirects you to the Twitter authorization entry page.

The screenshot shows the Twitter authorization page for 'Accela Automation'. At the top, there's a 'Sign up' button. Below it, a title reads 'Authorize Accela Automation to use your account?'. A blue box on the left lists permissions: 'This application will be able to:' followed by a bulleted list: 'Read Tweets from your timeline.', 'See who you follow, and follow new people.', 'Update your profile.', 'Post Tweets for you.', and 'Access your direct messages.' To the right of this box is a Twitter logo and the text 'Accela Automation', 'www.accela.com', and 'Accela Automation'. Below these are two input fields for 'Username or email' and 'Password', a 'Remember me' checkbox, and links for 'Forgot password?'. At the bottom are two buttons: 'Authorize app' (blue) and 'No, thanks' (grey). A note below the buttons states: 'This application will not be able to.' followed by a bullet point: 'See your Twitter password.' A separate note at the bottom right explains how to revoke access and mentions terms of service and privacy policy.

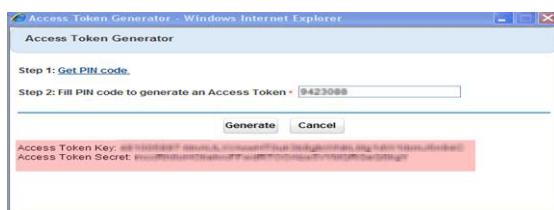
- Enter your Twitter account credentials, and then click **Authorize app**.

Twitter provides the PIN code.



- Enter the PIN code in the Access Token Generator page, and then click **Generate**.

Civic Platform displays the access token key and access token secret.



- Return to the Social Media administration portlet, and enter the Twitter connection details.

The screenshot shows a 'Social Media' configuration page. At the top, there are 'Menu' and 'Help' buttons. Below that, a 'Description' field contains the text 'Twitter is an online social networking service and microblogging platform'. A 'Name' field is set to 'Twitter'. At the bottom of this section are 'Save', 'Reset', 'Generate', and 'Help' buttons.

Below this, under 'Access Token Secret', there is a long, complex string of characters. A 'check spelling' button is next to it. Under 'Access Token Key', there is another long string. A 'check spelling' button is next to it. At the bottom of this section are 'Proxy Host' (set to '192.168.1.100') and 'Proxy Port' (set to '8080').

Access Token Secret	The access token secret that displays in the Access Token Generator page.
Access Token Key	The access token key that displays in the Access Token Generator page.
Proxy Host	Optional. The host address of the proxy server that you plan to use for posting tweets.
Proxy Port	Optional. The port of the proxy server that you plan to use for posting tweets.

7. Click **Save**.

Civic Platform saves the access token secret and access token key for posting tweets.

Customizing the Twitter Account Name

To change the Twitter account name from Civic Platform to your agency's Twitter account name, after generating your access token key and access token secret in Twitter, you must configure the related Standard Choice.

Table 131: Standard Choices Configuration

Name	New/ Existing	Level	Standard Choice values	Value Description	Description
SOCIAL_MEDIA_SETTINGS	New	Agency	TWITTER	CONSUMER_KEY=*****, CONSUMER_SECRET=*****	The Standard Choice registers the consumer key and consumer secret you get from the Twitter site. Replace the "*****" in the Value Desc with the actual consumer key and consumer secret strings.

Configuring EMSE Methods for Twitter Integration

Civic Platform uses EMSE methods for posting tweets. With the methods, users can read and post Twitter comments from within Civic Platform.

The following EMSE method posts messages to twitter:

```
ScriptResult post(String providerCode, String url, Map<String, Object>
params)
```

The following EMSE method generates an empty Map object into which you can put the parameters (

```
params)
```

```
:  
Accela Automation.oAuthClient.initPostParameters()
```

Sample Script and Sample Tweet

Topics:

- [Sample POST Request Script](#)
- [Sample Tweets Posted from Civic Platform](#)

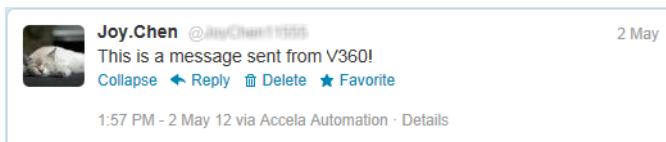
Sample POST Request Script

This sample script posts the message “A message from Accela!” to Twitter:

```
//Sample of Post request
function updateTwitterStatus()
{
    var client = Accela Automation.oAuthClient;
    var oauthProviderCode = 'TWITTER';
    var url = 'https://api.twitter.com/1/statuses/update.json';
    var params = client.initPostParameters();
    params.put('status', 'A message from Accela!');
    var scriptResult = client.post(oauthProviderCode, url, params);
    if (scriptResult.getSuccess())
    {
        Accela Automation.print("Success: " + scriptResult.getOutput());
    }
    else
    {
        Accela Automation.print("Failure: " + scriptResult.getErrorMessage());
    }
}
```

Sample Tweets Posted from Civic Platform

Associate the [Sample POST Request Script](#) with the ApplicationSubmitAfter event. When users create a new application and save it, it triggers the ApplicationSubmitAfter event. The following tweets display on the Twitter account for which you configured the access token key and secret.



Configuring Social Media Permissions and Comments

At a minimum, users must have permission to view a record to be able to “like” and “tweet” a record. You can further refine who has the ability to “like” and “tweet” records by configuring Social Media Settings in Citizen Access Admin, using the procedure below.

Users who have permission to “like” and “tweet” records see “like” and “tweet” buttons on records they have access to in Citizen Access. Clicking “like” posts record details to the user’s Facebook page. Clicking

“tweet” posts record details to their Twitter page. You can configure the record details and the text that display as comments on Facebook and Twitter, as follows.

To configure social media permissions and social media comments

1. Sign in to Citizen Access Admin: Go to Civic Platform > Admin > Setup portlet > Administration > ACA Admin.
2. For each module where you are implementing social media functionality, select the module and then click Module Settings under General Settings.
3. Scroll down to Social Media Settings.
4. Choose which users can “like” and “tweet” records:
 - All Citizen Access Users
 - Record Creator Only
 - None
5. 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.

Social Media Settings

Select users who can like and tweet records: Choose among All ACA Users, Record Creator, and None.
Shared Comments: The Shared Comments will auto-populate when the users share or tweet a record.

Select users who can like, share and tweet records:

All ACA Users Record Creator None

Shared Comments:

Click the area below to edit general condition available variables according to format:
 \$\$capID\$\$: The Record ID.
 \$\$ModuleName\$\$: The Record Module Name.
 \$\$capType\$\$: The Record type.
 \$\$Address\$\$: The Record address.
 \$\$Status\$\$: The Record status.
 \$\$CurrentDate\$\$: The Date of today.

Record Detail Variables

\$\$capID\$\$ \$\$ModuleName\$\$ \$\$capType\$\$ for \$\$Address\$\$ has been changed to \$\$Status\$\$ on
 \$\$CurrentDate\$\$.

Using record detail variables and text, configure the comment to display when users click "like" and "tweet"

Part 5: Automated Data Processing

Civic Platform provides functions to automate data processing.

Related Information

[Processing Sets](#)

[Setting Up Random Audits](#)

[Configuring Audit Logs](#)

[Processing Batch Jobs](#)

[Importing and Exporting Settings](#)

Processing Sets

Sets provide a way to quickly and efficiently process groups of records in bulk. For example, you can use sets to organize multiple applications or multiple service requests into groups for batch processing. You can use sets to simultaneously update the workflow for several applications or service requests at a time. For example, you can use a set to simultaneously update the Architect for several applications.

You can create sets of many types of records, not just applications and service requests. There is no limit to the number of records you can include in a set. Civic Platform allows administrators to extend set functionality to multiple types of sets for the agency. A group of records, addresses, parcels, or licensed professionals can also make up a set for batch processing.

You can enhance basic set functionality by including the ability to incorporate conditions, comments, or the application of licensed professionals, owners, and/or contacts to a set. Other functionality includes generating reports and running scripts for record sets.

You can also create sets of sets, which enables you to group multiple sets together, and then perform fee analysis and payment processing for multiple sets simultaneously.

Click a topic title below for full details.

Related Information

[Configuring Basic Set Functionality](#)

[Locating Records in a Set](#)

[Exporting a Set Member List to CSV](#)

[Extending Set Functionality](#)

[Creating Records from a Parcel Set](#)

[Generating Reports for Sets](#)

[Enabling Random Audits of Sets](#)

[Configuring Set of Sets Functionality](#)

[Configuring Set Types](#)

Configuring Basic Set Functionality

You can configure basic set functionality to enable tabs, buttons, and record details, for example, by setting FIDs for the following set types:

- Record sets
- Parcel sets
- Address sets
- Licensed professional sets.

To enable this functionality, set the applicable FIDs. Refer to the *Accela Civic Platform Configuration Reference*.

Locating Records in a Set

The Sets portlet has a Record ID filter, enabling you to query a set member list to locate a record in the set, then modify the record or delete it from the set. This filter enables you to query the set member list using both Record ID and Alt-ID.

The screenshot shows the 'SET ID: JING TEST' portlet. At the top, there are buttons for Menu, Look Up, Clone, Delete, Execute Script, and Help. Below these are tabs for Set, Set Member (13), Comments (0), Condition (0), and Conditions of Approval (0). The 'Set Member (13)' tab is selected. A green circle highlights the 'Record ID' input field, which contains '11CAP-0000055'. To the right of the input field is a magnifying glass icon. A green arrow points from the text 'Use the Record ID filter to locate a specific record in a set' to this input field. Below the input field is a navigation bar with arrows for back, forward, and page numbers (1, 2, 3). The main area displays a table of set members:

	Alternate ID	Number	Street Name	Street Type	City	Assigned to
<input type="checkbox"/>	11CAP-0000055	800	SONOMA	AVE	PETALUMA	
<input type="checkbox"/>	11CAP-0000056	2633	CAMINO RAMON	ST	SAN RAMON	
<input type="checkbox"/>	11CAP-0000056	400	RAINSVILLE	RD	UNINCORPO...	
<input type="checkbox"/>	11CAP-	2633	CAMINO RAMON	ST	SAN RAMON	

Exporting a Set Member List to CSV

You can export a set member list to a CSV file by navigating the Set Member tab and then selecting the CSV Export option, as shown below.

The screenshot shows the 'SET ID: JING TEST' portlet. The 'Customize Content' menu is open, revealing options like 'CSV Export', 'Expand List', 'Edit View', and 'Print Page'. A green circle highlights the 'CSV Export' option, and a green arrow points from the text 'Export set member lists via the CSV Export option' to it. The 'Set Member (13)' tab is selected. Below the table is a navigation bar with arrows for back, forward, and page numbers (1, 2, 3). The main area displays the same table of set members as the previous screenshot.

Extending Set Functionality

You can enhance the basic set functionality of record, parcel, address, and licensed professional set types by including the ability to incorporate conditions, comments, and the execution of scripts on set members.

To implement the functions described in this section, refer to "Processing Sets" in the *Civic Platform User Guide*.

Topics

- [Enabling Set Conditions](#)
- [Enabling Comments](#)
- [Executing Set Scripts](#)
- [Applying Owners to Sets](#)
- [Applying Licensed Professionals to a Record Set](#)
- [Applying Contacts to a Record Set](#)
- [Changing the Status in Record Sets](#)

Enabling Set Conditions

Civic Platform can simultaneously associate a condition with record, parcel, address, and licensed professional set members, and provide the same owner functionality for the set members as it does for individual records, parcels, addresses, and licensed professionals. Civic Platform displays these conditions on the **Conditions** tab for the set.

Civic Platform applies and enforces conditions on all Civic Platform data, regardless of whether your agency stores address, parcel, owner (APO) or licensed professional data in a Civic Platform database or external APO database.

Enabling Comments

You can enable a set comment field so that users can broadcast information regarding problems or special information applicable to the set members. Civic Platform displays these comments on the **Comments** tab for the set. You can configure set comments for record, address, and licensed professional set types. You can configure a spell checker to display under all text fields.

Executing Set Scripts

Civic Platform provides the ability to run a pre-configured EMSE (Event Manager and Script Engine) script on record, parcel, address, and licensed professional set types. You configure the applicable Standard Choices and Standard Choices Values for each set type in order to populate the drop-down list of available EMSE scripts from the **Execute Script** button in each set portlet.

Applying Owners to Sets

Civic Platform can simultaneously associate an owner with record and parcel set members, and provide the same owner functionality for the record and parcel set members as it does for individual records and parcels. Civic Platform displays these owners on the **Owners** tab for the set.

Applying Licensed Professionals to a Record Set

Civic Platform can simultaneously associate a licensed professional with record and parcel set members, and provide the same licensed professional functionality for the record and parcel set members as it does for individual records and parcels. Civic Platform displays these licensed professionals on the **Licensed Professionals** tab for the set.

Applying Contacts to a Record Set

Civic Platform can simultaneously associate a contact with record set members, and provide the same contact functionality for the record set members as it does for individual records. Civic Platform displays these contacts on the **Contacts** tab for the set.

Changing the Status in Record Sets

Civic Platform can simultaneously associate a status with record set members, and provide the same status functionality for the record set members as it does for individual records. Civic Platform displays the status on the **Status** tab for the set.

Creating Records from a Parcel Set

Based on the specified parcel condition and status criteria for a parcel set, Civic Platform can create records and record sets.

To create records from parcel sets, refer to "Processing Sets" in the *Accela Civic Platform User Guide*.

Generating Reports for Sets

Civic Platform can simultaneously associate reports for record, parcel, address, and licensed professional set members, and provide the same viewing and printing report functionality for set members as it does for individual records, parcels, addresses, and licensed professionals. When implemented, the specified report runs one time for each set member.

To implement this function, manually assign reports in the Record Details portlet to the set member list portlet in Report Manager. Set the session variables shown in [Table 132: Session Variables for Set Reports for Report Manager](#) for each record set.

Table 132: Session Variables for Set Reports for Report Manager

Set Type	Variables
Record Sets	SETID (\$\$setID\$\$)CAPID(\$\$capID\$\$)
Parcel Sets	ParcelID (\$\$parcelID\$\$) SETID (\$\$setID\$\$)
Address Sets	AddressID (\$\$addressID\$\$)SETID (\$\$setID\$\$)
Licensed Professional Sets	LicensedProfessionalID (\$\$licensedprofessionalID\$\$)SETID (\$\$setID\$\$)

For more information about Report Manager, see [Report Manager](#) for more information about Session Variables, see [Report Manager](#).

Enabling Random Audits of Sets

You can configure how frequently Civic Platform audits a record or percentage of records, specify the level at which to perform the audit (record type-level, module-level, or agency-level), and specify a maximum number of records each audit can return.

Agency users can audit a randomly selected set of permits, applications, work orders, or other types of records. Civic Platform selects the set to audit based on specific parameters you define. After generating the set, you can filter the set, run a report, execute a script, and otherwise audit the set.

For more information about configuring random audits, see [Setting Up Random Audits](#).

Configuring Set of Sets Functionality

You can configure set of sets functionality to combine similar sets (for example, record sets) into a set of sets to facilitate convenient ways for batch analysis and processing. You use the “set of sets” functionality primarily for accounting functions.

Configuring Set Types

Set types play an important role in working with sets because set types define which reports and scripts are available, and who has permission to run those reports and scripts.



Note:

You must create the reports and scripts you need before you can associate them to a set type in this portlet. See [Report Manager](#) for more information.

Topics

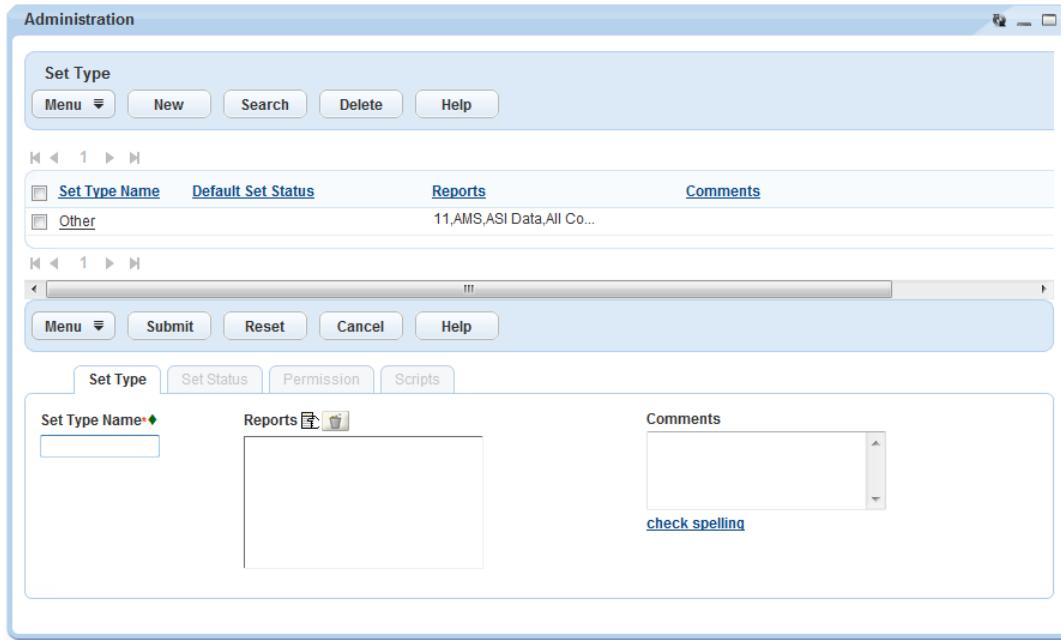
- [Accessing the Set Type Portlet](#)
- [Creating a New Set Type](#)
- [Defining Set Status Values](#)
- [Setting Permissions](#)
- [Assigning Scripts](#)
- [Searching for a Script](#)
- [Set Type Portlet Fields and Buttons](#)

Accessing the Set Type Portlet

Use the Set Type portlet to create and manage set types.

1. Open the Civic Platform Admin portlet.
2. In the Setup menu, choose **Application > Set Type**.

The Set Type portlet displays.



Creating a New Set Type

1. Access the Set Type portlet (see [Accessing the Set Type Portlet](#)).
2. Click **New**.

A blank Set Type form displays.

3. Complete the fields with available data:

Set Type Name	Enter the name of the set type in this box.
Reports	Choose the reports you want to be able to run for this set type. Do so by clicking the Select button to the right of the Reports field label. You can select more than one report.
Comments	Enter commentary about the set type in this field.

4. Click **Submit**.

Civic Platform creates the new set type and a new row displays in the set type portlet. Additional tabs for the new set type are available. Use the new set types to define set status values (see [Defining Set Status Values](#)), set permissions to use the set type (see [Setting Permissions](#)), and select scripts to associate with the new set type (see [Assigning Scripts](#)).

Defining Set Status Values

1. Create a new set type or open an existing set type by clicking the set type name hyperlink. The Set Type detail portlet displays.
2. Click the **Set Status** tab. The Set Status page displays.

3. Click **New**.

A blank row appears.

4. Enter a status value as you want it to appear in the **Set Status** drop-down on the Set tab.
5. Click **Submit** to save.
6. Repeat steps 3 through 5 to add additional status values.

Setting Permissions

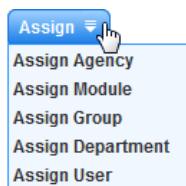
You can add one or several assignment choices. If an individual user does not have permission to use a set type, the set type does not appear to the user in the **Set Type** drop-down list on the Set tab.

To set permissions

1. Create a new set type or open an existing set type by clicking the set type name hyperlink.
The Set Type detail portlet displays.
2. Click the **Permission** tab.
The Permission page displays.

Type	Name
Agency	FLAGSTAFF
Group	Building Technician
Module	Building

3. Click **Assign** to display a menu of assignment choices.
A list of available choices displays.



4. Select one of the options from the **Assign** menu.
5. Select the agency, module, group, department, or user you want to add to the Permission list.
6. Click **Submit**.
The selected agency, module, group, department, or user displays on the Permission tab.
7. Repeat steps 3 through 6 to grant another agency, module, group, department, or user with permission to access the current set type.

Assigning Scripts

You can assign scripts directly to a set type. When a user with permission to work with the set type opens a set record in Civic Platform, the user can run the associated scripts directly from the Set portlet.

To assign a script

1. Create a new set type or open an existing set type by clicking the set type name hyperlink.
The Set Type detail portlet displays.
2. Click the **Scripts** tab.
The Scripts page displays.

The screenshot shows the Set Type detail portlet with the following interface elements:

- Set Type Name:** Preliminary
- Buttons:** Menu, Submit, Look Up, Search, Delete, Help, Data Language (English (US))
- Tabs:** Set Type, Set Status, Permission, Scripts (selected)
- Table Headers:** Script Code, Description
- Message:** 0 record(s) found.

3. Click **Look Up** to locate script(s) you want to associate to the current set type.
4. Enter full or partial criteria to locate the script you need and click **Submit** or press **Enter**.
A list of scripts meeting your search criteria displays.

The screenshot shows the Look Up dialog box with the following interface elements:

- Set Type Name:** SetTypeName1
- Buttons:** Menu, Select, Search, Cancel, Help
- Pagination:** 1 2 3 4 5 6 7 8 9 10
- Table Headers:** Script Code, Script Title
- Script List:**

APPLICASUBMITAFTER4STRUCESTAB	APPLICASUBMITAFTER4STRUCESTAB
APPLICASUBMITAFTER4SUPERAGENCY	APPLICASUBMITAFTER4SUPERAGENCY
APPLICASUBMITBEFORE4STRUCESTAB	APPLICASUBMITBEFORE4STRUCESTAB
APPLICATIONCONDITIONOFFAPPROVALUPDATEAFTER	APPLICATIONCONDITIONOFFAPPROVALUPDATEAFTER
APPLICATIONCONDITIONOFFAPPROVALUPDATEBEFORE	APPLICATIONCONDITIONOFFAPPROVALUPDATEBEFORE

5. Select each script you want to associate to the current set type, then click **Select**.
Civic Platform associates the selected scripts to the set type.

Searching for a Script

If you have associated many scripts to a single set type, you can use Search to locate a particular script.

To search for a script

1. Create a new set type or open an existing set type by clicking the set type name hyperlink.
The Set Type detail portlet displays.
2. Click the **Scripts** tab.
The Scripts page displays.
3. Click **Search**.
4. Enter search criteria and then click **Submit**.
Search results meeting your criteria display.

Set Type Portlet Fields and Buttons

The following table lists and defines the fields and buttons available in the Set Type portlet. Civic Platform groups fields and buttons by secondary tab.

Table 133: Set Type Portlet Fields and Buttons

SET TYPE TAB	
Comments	Enter comments about the current set type.
Default Set Status	You can define a default set status as needed by selecting an option from the drop-down. When you create a new set using the current set type, Civic Platform automatically applies the default set status.  Note: Before you can define a default set status, you must create status options on the Set Status tab.
Reports	Click the Select button to the right of the Reports field label to access a list of reports you can associate with the current set type. Select one or more reports as needed.
Reset	Click this button to restore the displayed fields to the last saved values.
Set Type Name	Enter the name of the set type in this field.
Submit	Click this button to save new or modified data on this tab. After you Click Submit , you cannot use the Reset button to restore any previous data.
SET STATUS TAB	
Delete	Click this button to delete selected status values.
New	Click this button to create a new status value.
Status Maintenance/Status	Enter the set type status exactly as you want it to appear in the Set Type Status drop-down list.
Submit	Click this button to save new or modified data on this tab.
PERMISSION TAB	
Assign	Click this button to view a menu of options you can choose from in assigning permission to use a set type. Available options include: Assign Agency, Assign Module, Assign Group, Assign Department, and Assign User.
Delete	Click this button to delete selected assignments.
SCRIPTS TAB	
Delete	Click this button to delete selected scripts from the list, thereby disassociate the script and the set type.
Description	Enter a concise description for a selected script in this field.
Look up	Click this button to search for scripts you want to associate with the current set type. See Assigning Scripts for details.
Script Code	This read-only field displays the code, or name, of a chosen script
Search	Click this button to search the list of currently associated scripts.
Submit	Click this button to save new or modified data on this tab.

Setting Up Random Audits

You can determine how frequently you perform audits on a record or percentage of records, specify the level at which you perform the audit (record type-level, module-level, or agency-level), and determine the maximum number of records each audit can return.

Click a topic title below for full details.

Related Information

[Setting Record Type Audit Frequency](#)

[Configuring Reports for Random Audit Sets](#)

Setting Record Type Audit Frequency

For more information about creating and editing Random Audit groups, see “Random Audits” in the *Accela Civic Platform User Guide*.

To set a record type audit frequency

1. Access the Record Type Administration portlet ([Accessing Record Type Administration](#)).
2. Select the Portlet and the Record Type for which you want to set the audit frequency.

Civic Platform displays the Record Type Information.

The screenshot shows the 'Pharmacist' record type in the Record Type Administration interface. The 'Summary' tab is selected, displaying basic information: Record Type Name: Pharmacist, Current Status: Enabled, Last Updated by: ADMIN, Updated on: Sep 29 2009 04:14, Number of Records created: 13, and Last Record created by: ADMIN. The 'Navigation Panel' on the left lists 'Summary', 'Setting', and 'Other Associations'. Buttons for 'Save' and 'Close' are at the bottom.

3. Click the Setting option, and scroll to the Audit Frequency section.

The screenshot shows the 'Audit Frequency' configuration interface. It includes an 'Instructions' box stating: '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.' Below is a table with columns 'Record Type Level' and 'Audit Frequency'.

Record Type Level	Audit Frequency
Licenses	
Medical	
Pharma	
Pharmacist	

4. To designate the interval between audits for a record type, enter the number of months in the Audit Frequency column. You can enter a number under any of the record type levels. For example, enter 3 in the Audit Frequency field for the Licenses record type to prevent the audit of licenses within a three month period.

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 Licenses to 18 months for Licenses/Medical/Pharma/Pharmacist, the audit frequency for Licenses/Medical/Pharma/Renewal also changes to 18 months.

5. Click **Save**.

Configuring Reports for Random Audit Sets

After you have enabled the random audit feature, agency users can generate audit sets and can run reports for the sets. You must configure the reports that are available to run on random audit sets.

This section provides instructions for creating reports specifically for the random audit portlet. For more general information about reports, refer to [Report Manager](#).

To configure a random audit report

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Either locate an existing report to assign to the random audit portlet or create a new report.
 - To assign an existing report to the random audit portlet, use the navigation tree to locate the report.
 1. Use the plus (+) and minus (-) buttons to find reports by category, name, permission, portlet, or workflow.
 2. When you have located the report, click the report's name. Proceed to step 4.

The report's details display in the report portlet.

The screenshot shows the Report Manager interface. On the left, a navigation tree displays categories like 'Reports by Category' (ACA Reports, Standard Reports), 'Licensing' (Licensing, Permit), and specific reports like 'Address Activity', 'Building Permit', 'C404 Report of Permits Issued', etc. In the center, a form titled 'Report Name: Assessor Report' is displayed. The form includes fields for 'Name' (Assessor Report), 'Category' (Standard Reports), 'Output Format' (Default Format), 'Print Only' (No), 'EDMS' (ADS), 'Report Link' (AA_Assessor_Ora.rpt), and 'Description'. It also has sections for 'Send to Printer' (None), 'Print Copies' (1), 'Save to EDMS' (No), 'Include on Report Portlet' (checkboxes for Reports 1-5), 'Process Service' (Crystal), and 'Send in e-mail' (checkbox). At the bottom, there are 'Submit', 'Reset', 'Preview', and 'Help' buttons.

- To create a new report, enter the new report information in the blank Report Detail form that displays before you select a report to view from the navigation tree. Or, right-click a category of the navigation tree, and then click **New Report**.
 1. Complete the fields that display. For a description of the fields, see [Table 134: Report Detail](#).
 2. Click **Submit** to save the report detail.

Civic Platform saves the report detail and adds the report to the selected category in the navigation tree.

Report Name: License

Report Detail Parameters Permission Portlets Workflow

Added successfully.

Name * License Category * Standard Reports Output Format *

Send to Printer * Print Copies 1

Save to EDMS * EDMS Object * Asset Condition Assessment

Include on Report Portlet

- Reports 1 Reports 2
- Reports 3 Reports 4
- Reports 5

Description

Send in e-mail All set member Records' contacts Document Group/Category *

check spelling

Authentication Method Not Required

3. Click Preview to preview the report.

If the report contains required parameters Civic Platform displays a parameter prompt window, as illustrated below:

report set Parameter - Windows Internet Explorer

Submit Cancel Help

End Date *

Begin Date *

4. Enter the report parameters if required.

For information on adding report parameters, see [Report Manager](#).

Civic Platform displays the report preview in another window.

3. To assign the desired report to the random audit portlet, click the Portlets tab.

Civic Platform displays the list of portlets to which the report belongs.

Report Name: Accessor Report

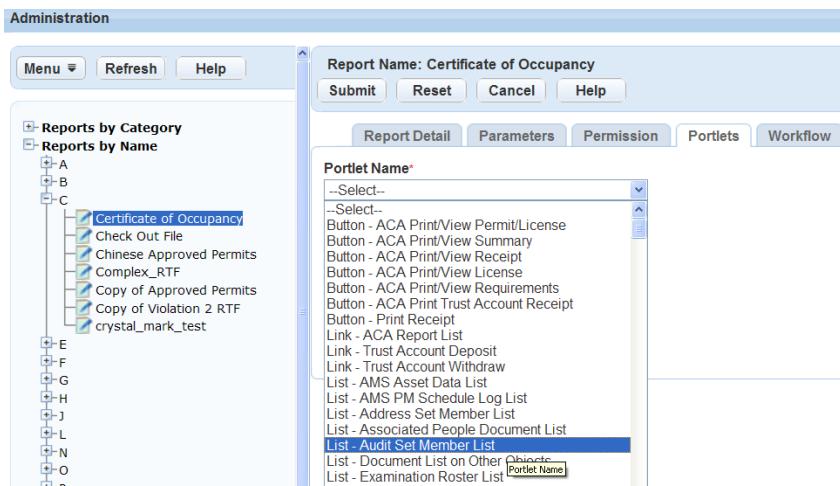
New Delete Help

Report Detail Parameters Permission Portlets Workflow

Portlet Name	Module	Single Window	Menu Criteria
Record List	ALL	No	Create Criteria
Fee List	ALL	No	Create Criteria

4. Click New.

Civic Platform displays the form to select a portlet to assign to the report.



5. Complete the following fields:

- | | |
|--------------|---|
| Portlet Name | Choose List - Audit Set Member List from this drop down menu. |
| Module | Choose a module from this drop down list. The report is available in the chosen portlet for all users with access to this module. |
| Display | Choose Single Window to display the report in one pop up window, and choose Multiple Windows to display each report in its own pop up window. |

6. Click Submit.

Civic Platform saves your changes and adds the report to the list of portlets to which the report belongs. When users hover over the Reports button in the Random Audit portlet, the report's name displays. When users click the report's name, the report runs on the set.

Table 134: Report Detail

Category	Select the appropriate category for the report. Civic Platform uses this category to organize and display the report for the user in the Reports Portlet or in form and list portlets.
Default Printer	Select the printer you want to use. Entering a default printer automatically prints a report when a user runs it and notifies the user that printing has occurred. To add a default printer to the list, see Report Manager .
Description	Enter a description of the report. For example, enter "The inspection list report displays the total number of inspections within a specific date range, ordered by inspection type."
EDMS	Select the Electronic Document Management System (EDMS) you want to save the report to. EDMS is available for all report services and types with the exception of client executables. For information on adding or removing the EDMS options in the drop-down, refer to the Accela Civic Platform Configuration Reference .
EDMS Object	Select the Electronic Document Management System (EDMS) object you want to save the report to. When you save a report it displays under the Documents or Attachments tab for the associated object. Options include: Record, Parcel, Workflow, and Asset Inspections. EDMS is available for all report services and types with the exception of client executables.
Name	Enter the name you want to display for the report in the Reports Portlet or Report Menu.
Output Format	Select the output format of the report. The options depend on the formats the report service supports. Options include Adobe Acrobat (.pdf), Microsoft Word (.doc), Microsoft Excel (.xls), Rich Text Format (.rtf), and CSV comma-delimited (.csv). If you leave Output Format blank, Civic Platform uses the default viewer for the report service. For information on updating output formats, Report Manager .

Print Only	Select Yes or No from this drop-down list to indicate whether you want to print the report.
Report Link	Click the Select Report Link to choose the reports available in the report directory on the server. To expand the reports list, select Expand Reports from the menu. To contract the list to display a small list of reports, select Contract Reports from the menu.
Reports Portlet 1 Reports Portlet 2 Reports Portlet 3 Reports Portlet 4 Reports Portlet 5	Select the Reports portlet where you want the report to appear. A report can appear on more than one Reports portlet. For instructions and information on where the Reports portlets appear or how to make them visible, see Designing Forms for Portlets .
Report Service	Select the report service to use for the specified report. The options selected in the drop-down filter the reports that display in the Report Link window. For information on how to update existing or add additional report services, see Report Manager .
Save to EDMS	Select whether or not you want to save the report to the Electronic Document Management System (EDMS) specified in the EDMS field. Choose Yes to automatically save the report to EDMS. Choose No to not save the report automatically to EDMS.
Send in Email	<p>This option becomes active based on the report format you select in the Output Format box. To activate this option, you must select an output format that is not the default format.</p> <p>Select this option to allow users to send a report to application contacts. When you select this option, you must also designate a corresponding set of email recipients from the associated drop-down list. The record contacts in the drop-down list values refer to the contacts for the session application. Drop-down list values include:</p> <ul style="list-style-type: none"> Attach all Record Contacts The application contacts and licensed professionals. When you select this option and users run a report, a Send in Email button appears on the report preview page. Users click this button to select email recipients. Attach Primary Record Contacts The application primary contacts and licensed professionals. When you select this option and users run a report, a Send in Email button appears on the report preview page. Users click this button to select email recipients. Auto-Attach all Record Contact The application contacts and licensed professionals. When you select this option and users run a report, Civic Platform automatically sends an email to application contacts and licensed professionals. Auto-Attach Primary Record Contacts The application primary contacts and licensed professionals. When you select this option and users run a report, Civic Platform automatically sends an email to primary application contacts and licensed professionals. <p>You can define email subject and body under the EMAIL_REPORT SUBJECT and EMAIL_REPORT_CONTENT content customize types. The Send in Email field supports multiple languages.</p> <p>For more information on working with the content customize form, see Working with Communication Manager.</p> <p>To configure email reports for Citizen Access Users, contact the Accela services implementation team. These scripts do not contain any event logic and an implementation specialist must review them prior to you using them. The available event scripts are: SendReportInEmail-1 and SendReportInEmail-2</p>
Template	Click Browse to select the Rich Text Format (.rtf) template report. The template can be up to 5MB. When you save a template type report, the template name displays next to the template label. This field displays only for the RTF report service type.
Type	Select the report type or the report engine used to launch the report. This includes Crystal, Oracle, Microsoft Reporting Services, and Accela Report Writer.

Configuring Audit Logs

Civic Platform enables audit log functions when you create a new agency. To set up this feature you must be a super administrative user who can access their Agency Profile. For information on how to become a super agency administrator, please contact your Accela implementation specialist. On-premise customers can find the agency profile setup information in the "Agencies and Functions" section of the *Civic Platform On-premise Administrator Supplement*.

Click a topic title below for full details.

Related Information

[Configuring the Inspection Detail Audit Log](#)

[Configuring the Record Status History](#)

[Configuring the Record List Audit Log](#)

[Configuring the Receipt Print Audit Portlet](#)

Configuring the Inspection Detail Audit Log

To configure an inspection detail audit log

1. Access the Audit Log portlet ([Accessing the Audit Log Portlet](#)).
2. Select **Inspection Detail** from the **View** drop-down list.

Civic Platform displays the audit log elements for inspection detail.

The screenshot shows the 'Audit Log' configuration page under the 'Administration' tab. At the top, there are 'Save', 'Reset', and 'Help' buttons. Below that is a 'View' dropdown menu set to 'Inspection Detail'. A list of audit log elements is displayed, each with a checkbox. Most checkboxes are checked, indicating they are selected for auditing.

<input type="checkbox"/> Element
<input checked="" type="checkbox"/> Record ID
<input checked="" type="checkbox"/> Record Type
<input checked="" type="checkbox"/> Inspection Type
<input checked="" type="checkbox"/> Status
<input checked="" type="checkbox"/> Scheduled Date
<input checked="" type="checkbox"/> Request Comment
<input checked="" type="checkbox"/> Inspection Date
<input checked="" type="checkbox"/> Inspector
<input checked="" type="checkbox"/> Result Comment
<input checked="" type="checkbox"/> Request Date
<input checked="" type="checkbox"/> Submit Date
<input checked="" type="checkbox"/> Department
<input checked="" type="checkbox"/> Alternate ID
<input checked="" type="checkbox"/> Requestor

3. Select the inspection detail elements you want to include in the Inspection Detail audit log. You can also click the Element check box to select all available elements. You must select at least one inspection detail element for the audit log.

For a complete list of inspection detail elements, see [Table 135: Inspection Detail Audit Log Fields](#).

4. Click **Save**.

Civic Platform displays a confirmation message.

Table 135: Inspection Detail Audit Log Fields

Alternate ID	An identification other than the main identification, such as a parcel ID.
Department	The department responsible for the inspection modification, such as Building or Code Enforcement.
Inspection Date	The inspection's schedule date.
Inspection Type	The type of inspection, such as Building, Electrical, or Insulation.
Inspector	The inspector assigned to conduct the inspection.
Record ID	The application identification number.
Record Type	The type of application, such as a Commercial or Residential Building Permit.
Request Comment	Any comments related to the inspection. These comments can be user comments or those that populate based on predefined Standard Comments.
Request Date	The request date for the inspection.
Requestor	The name of the individual who requested the inspection.
Result Comment	Any comments related to the inspection. These comments can be user comments or those that populate based on predefined Standard Comments.
Scheduled Date	The inspection's scheduled date.
Status	The inspection status, such as Approved, Pending, or Denied.
Submit Date	The date when a user submitted the application.

Configuring the Record Status History

When a user clicks the View Log button in the Application History tab of a record, the Record Status History displays, and details all changes to an application's status.

The screenshot shows a web-based application interface for managing records. At the top, there is a header bar with a 'Record ID: BLD13-00002' label and several buttons: 'Menu', 'Delete', 'View Log' (which is highlighted in blue), 'Search', and 'Help'. Below the header, there is a navigation bar with links: 'Go To', 'Application History (2)', 'Comments (0)', 'Conditions (0)', 'Contacts (2)', and 'Documents (0)'. The main content area is titled 'Record Status History' and contains a table with the following data:

Status Date	Status	Comment	Action By
03/04/2013	Submitted		Accela Admini...

Figure 41: Record Status History View Log Button

For example, if a user deletes a status that they entered in error, the deleted status displays in the audit log, as shown in the screen shot below.



Note:

If a user changes the status for a record and then attempts to delete the most recent status, Civic Platform displays a warning message. The message states: "You are deleting the latest history, which causes an inconsistency between the current status and the latest history record. Do you want to continue?" Click Yes to delete the latest history. Click No to return to the working area without deleting the status history entry.

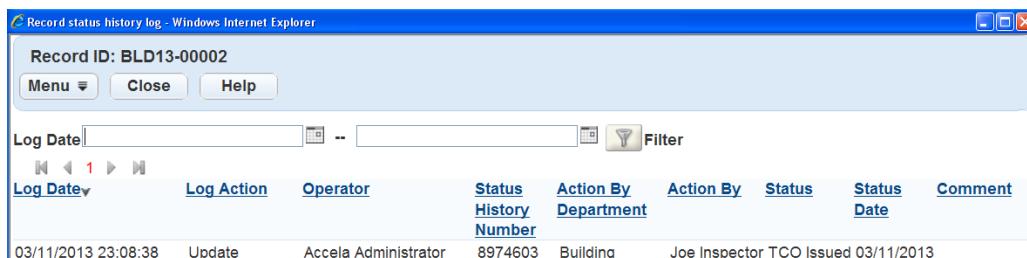


Figure 42: Record Status History Audit Log

To configure a Record Status History audit log

1. Access the Audit Log portlet ([Accessing the Audit Log Portlet](#)).

2. Select **Record Status History Form** from the **View** drop-down list.

Civic Platform displays the audit log elements for the Record Status History Form.

Administration

Audit Log

Save Reset Help

View* Record Status History Log

Element

Status History Number

Action By Department

Action By

Status

Status Date

Comment

3. Select the Record status history elements you want to include in the Record Status History audit log. You can also click the Element check box to select all available elements. You must select at least one element for the audit log.

For a complete list of record status history form elements, see [Table 136: Record Status History Audit Log Fields](#).

4. Click **Save**.

Civic Platform displays a confirmation message.

Table 136: Record Status History Audit Log Fields

Action By	The individual responsible for the application status modification.
Action by Department	The department responsible for the application status modification, such as Pending or Open.
Comment	Any comments related to the application status history update. The comments that display in the audit log can be those a user entered manually or those that Civic Platform populates by predefined Standard Comments.
Status	The status of the inspection record inspection status, such as Approved, Pending, or Denied.
Status Date	The date Civic Platform applied the current status.
Status History Number	A number automatically generated to identify and track the status history changes.

Configuring the Record List Audit Log

The Record List audit log displays when a user clicks the View Log button in the Building portlet as illustrated in [Figure 43: Record List View Log Button](#). When a user clicks the View Log button, a page displays details about user actions and the records affected.

See [Figure 43: Record List View Log Button](#) for an example view of the Record List audit log.

<input type="checkbox"/> Record #	Status	Record Type	Application Name	Opened Date	Street #	Dir	Street Name	Type #	Unit	Related Records
<input type="checkbox"/> BLD13-00002	Submitted	Residential New	New Dream Home Cons...	03/04/2013	6		HAYES			View
<input type="checkbox"/> 333	Submitted	Residential New	New Dream Home Cons...	03/04/2013	6		HAYES			View
<input type="checkbox"/> BLD13-00001	Submitted	Commercial Pool-Spa	Commercial Spa	02/21/2013	3300		APPLE	LN	C	View
<input type="checkbox"/> BLD12-00012	Submitted	Multi-Family New	Park Place Apartments	07/01/2012	2012		Bishop	Dr		View
<input type="checkbox"/> BLD12-00011	Issued	Residential New	LaFong Residence	05/06/2012	2012		Bishop	Dr		View

Figure 43: Record List View Log Button

Log Date	Log Action	Operator	Record ID	Record Type	Status	Alternate
06/26/2012 13:28:00	Delete	Accela Administrator	12CAP-00000-0005P	Licenses/Business/General/Application Open	BUSA-20	
05/10/2012 16:53:44	Delete	Accela Administrator	12CAP-00000-0002Y	Licenses/Business/General/Application Issued	BUSA-20	
03/16/2012 12:25:16	Delete	Accela Administrator	12CAP-00000-0003R	Licenses/Business/General/Application Open	BUSA-20	
03/16/2012 12:25:09	Delete	Accela Administrator	12CAP-00000-0003Q	Licenses/Business/General/Application Open	BUSA-20	

Figure 44: Record List Audit Log

To configure a Record List audit log

1. Access the Audit Log portlet ([Accessing the Audit Log Portlet](#)).
2. Select Record List from the View drop-down list.
Civic Platform displays the Record List audit log elements.

<input type="checkbox"/> Element
<input checked="" type="checkbox"/> Record ID
<input checked="" type="checkbox"/> Record Type
<input checked="" type="checkbox"/> Status
<input checked="" type="checkbox"/> Alternate ID

3. Select the record list elements you want to include in the Record List audit log. You can also click the Element check box to select all available elements. You must select at least one record list element for the audit log.

For a complete list of record list elements, see [Table 137: Record List Audit Log Fields](#).

4. Click **Save**.

Civic Platform displays a confirmation message.

Table 137: Record List Audit Log Fields

Alternate ID	An identification other than the main identification, such as a parcel ID.
Record ID	The application identification number.
Record Type	The type of application, such as a Commercial or Residential Building Permit.
Status	The record status, such as Deleted.

Configuring the Receipt Print Audit Portlet

You can configure the Receipt Print Audit portlet to enable users to view which users printed receipts, the receipt type, receipt number, and the date the user printed the receipt.

You must enable FID-0324 to enable access to the Receipt Print Audit portlet. Refer to the Accela Civic Platform Configuration Reference for details on enabling FIDs. After you enable this FID users can access the portlet from Setup Administration > Finance > Receipt Print Audit. The portlet displays as follows:

Receipt Type	Receipt #	Printed By	Printed Date
Record Receipt	12189	Jerry Lu	12/05/2012 13:21:43
Record Receipt	12186	Jerry Lu	12/05/2012 13:18:56

Processing Batch Jobs

Batch jobs enable you to reduce your workload by automating repetitive tasks for multiple records all at once, during regularly scheduled intervals.

You can schedule batch jobs to do a variety of tasks, including synchronizations with legacy Accela GIS or the Index server.

Click a topic title below for full details.

Related Information

[Working with Batch Jobs](#)

[Manually Executing a Batch Job](#)

[Terminating a Batch Job](#)

[Viewing the Batch Job Log](#)

Working with Batch Jobs

Topics

- [Creating Batch Jobs](#)
- [Editing Batch Jobs](#)
- [Deleting Batch Jobs](#)
- [Searching Batch Jobs](#)

Creating Batch Jobs

Creating Batch Jobs

Civic Platform supports a variety of batch jobs including: asset/GIS synchronization, index server/application server synchronization, email notification, PM schedule work order generation, geotagging, inspection routing, and asset calendar index rebuilding. Please review the topics in this section for instructions on how to set up batch job functionality.

Topics

- [Creating a PM Schedule Batch Job](#)
- [Creating a Global Search Index Batch Job](#)
- [Creating a GIS Asset Sync Batch Job](#)
- [Creating a Batch Job for Expired License Email Notifications](#)
- [Creating a Proxy User Process Batch Job](#)
- [Creating a Script Batch Job](#)
- [Creating a Geotagging Batch Job](#)

- [Creating a Batch Job for Rebuilding Asset Calendar Index](#)
- [Creating an Optimized Inspection Route Batch Job](#)

Creating a PM Schedule Batch Job

You can create a batch job that automatically generates work orders in advance of a scheduled preventative maintenance. The batch job generates all work orders associated with the PM schedule in a time frame you determine. Schedule the batch job to correspond with the PM schedule so that Civic Platform generates work orders at the same time interval as the PM schedule.

To create a new preventative maintenance schedule batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New**.

Civic Platform displays the New Batch Job portlet.

3. Complete the following required fields:

Name	Enter an intuitive name for the batch job.
Description	Enter a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template named NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select job type “ System ” from this drop-down menu.
Service Category	After you select job type “ System ” from the Job Type drop-down menu, the Service Category drop-down menu displays. Select the batch job you want to create, in this example, PM Schedule .

4. Click **Submit**.

Civic Platform creates the batch job and then displays the Batch Job Detail portlet.

5. Associate PM Schedules to the batch job by completing the following steps:

a. Select the **PM Schedule** option from the **Service Category** drop-down menu.

Civic Platform displays the New PM Schedule Batch Job portlet.

- b.** Click the **PM Schedule** tab.

Civic Platform displays the PM Schedule List tab.

Schedule Name	Template Name	Schedule Status	Start Date	Next Schedule Date
0 record(s) found.				

- c.** Click **Look Up**.

Civic Platform displays the PM Schedule Search portlet.

Job Name: Inspector

Menu ▾ Submit Reset Cancel Help

Job Detail Job Schedule PM Schedule (0) Log (0)

Schedule Name	Template --Select--	Schedule Status --Select--
Start Date From [] To []	Next Schedule Date From [] To []	Trigger By --Select--
Time Interval From [] To []	Usage Interval From [] To []	<input type="checkbox"/> Generate Single Work Order for All Assets
<input type="checkbox"/> Generate Work Order if Previous One Opened	<input type="checkbox"/> Generate Work Orders for Child Assets up to [] level(s)	<input type="checkbox"/> Include Child Assets in Parent item's Work Order
<input type="checkbox"/> Link Asset Addresses to Work Orders	<input type="checkbox"/> Primary Asset Address Only	<input type="checkbox"/> Include Addresses in Asset's Work Order
<input type="checkbox"/> Generate Single Work Order for all Addresses	Asset Group --Select--	Asset Type --Select--
Asset ID []	Class Type --Select--	Comments []
Record Status Active		

- d.** Complete any fields that display. For a description of the fields, see [Table 139: Batch Job PM Schedule Fields](#).

- e.** Click **Submit**.

Civic Platform displays a list of PM Schedules that match your search criteria.

Schedule Name	Template Name	Schedule Status	Start Date	Next Schedule Date	Trigger By	Time Interval	Time Interval Type
PM Schedule...	WO TEMPLATE	Active	11/10/2010	11/01/2012	Scheduled Date	1	Day

- f.** Click the PM Schedules you want to add to the batch job.

Select only active PM Schedules you have not already assigned to the batch job. Otherwise, an error message displays.

- g.** Click **Select**.

Civic Platform associates the PM Schedule(s) to the batch job.

Schedule Name	Template Name	Schedule Status	Start Date	Next Schedule Date	Trigger By	Time Interval	Time Interval Type
PM Schedule...	WO TEMPLATE	Active	11/10/2010	11/01/2012	Scheduled Date	1	Day

- h. To remove a PM Schedule from a batch job, select it and click **Delete**.
6. Define the Job Schedule by completing the following steps:

- a. Click the **Job Schedule** tab.

Civic Platform displays the Job Schedule portlet.

The screenshot shows a web-based application interface for defining a job schedule. At the top, there's a header with 'Job Name: Inspector' and buttons for 'Menu', 'Save', 'Reset', and 'Help'. Below the header, there are tabs: 'Job Detail' (selected), 'Job Schedule' (selected), 'PM Schedule (1)', and 'Log (0)'. Under the 'Job Schedule' tab, there are several input fields: 'Frequency' set to 'Once', 'Start Date' and 'End Date' both empty, 'Schedule Status' set to 'On Hold', 'Start Time' showing '01 : 00 AM', and 'Time Out (seconds)' empty. At the bottom left, there's a 'PM Generate' section with a dropdown menu.

- b. Complete the following fields as described in [Table 138: Job Schedule Field Descriptions](#).
- c. Click **Save**.

Civic Platform saves the batch job.

- d. [Table 138: Job Schedule Field Descriptions](#)

End Date	If you select a value other than Once in the Frequency field, the End Date field activates. Enter the date on which the batch job stops running or select a date by clicking on the data picker beside the field.
Frequency	Select the frequency with which the batch job runs from this drop-down menu. Batch jobs can run once, daily, weekly, monthly, or yearly.
PM Generate	PM Generate is a required field that enables you to specify how far in advance the batch job generates work orders. Enter a number in the first field, then select Days, Weeks, Months, or Years from the drop-down menu in the second field. For example, to generate work orders two weeks in advance of the PM Schedule batch job, enter 2 in the numeric field and select Weeks from the drop-down menu. Or, enter 15 in the numeric field and select Days from the drop-down menu.
Schedule Status	Use this drop-down menu to turn a batch job on and off. Select Active to activate the batch job. Select On Hold to deactivate the batch job and save its information.
Start Date	Enter the date on which the batch job starts or select a date by clicking on the data picker beside the field. If you set a batch job Schedule Status to Active but do not specify a Start Date, an error message displays when you try to save the batch job.
Start Time	Determine the time of day at which the batch job begins running by selecting hour, minute, and a.m./p.m. from drop-down menus. If you set a batch job Schedule Status to Active but do not specify a Start Time, an error message displays when you try to save the batch job.
Time Out (seconds)	Enter the number of seconds a batch job attempts to run before timing out.

Table 139: Batch Job PM Schedule Fields

Asset Group	Enter the Asset Group Code.
Asset ID	Enter the Asset ID of an asset that belongs to the asset type you are looking for.
Asset Type	Enter the name of the asset type you are looking for.

Comments	Enter any comments associated with the maintenance schedule.
Generate Single Work Order for All Addresses	Select this option to create a work order for each asset address linked to this PM schedule. Otherwise, the PM schedule creates a single work order for all addresses. This option is not active if you select the Include Addresses in Asset's Work Order option.
Generate Single Work Order for All Assets	Select this option to create a work order for each asset linked to this PM schedule. Otherwise, the PM schedule creates a single work order for all linked assets.
Generate Work Orders for Child Assets up to n level(s)	Select this option to create work orders for linked assets and their child assets up to three levels.
Generate Work Order if Previous One Opened	Select this option to allow the PM schedule to create a work order for an asset that has a previous work order still open.
Include Addresses in Asset's Work Order	Select this option to include the addresses linked to the PM schedule in asset work orders created by the schedule.
Include Child Assets in Parent item's Work Order	This option becomes active when you check the Generate Work Orders for Child Assets up to n level(s) box. Select this option to create one work order for a parent asset and its child assets. Otherwise, each child asset receives a work order.
Link Asset Addresses to Work Orders	Check this box to show an asset's addresses in work orders created for that asset.
Primary Only	This option becomes active when you check the Link Asset Addresses to Work Orders box. Check this box to show only an asset's primary address in work orders generated by this PM schedule.
Record Status	Select the status of the record.
Schedule Name	Enter a unique name to identify the schedule.
Schedule Status	Use this drop-down list to select the status of the scheduled maintenance. Example: Active or Expired. The status controls whether or not the maintenance schedule executes a work order. If the status is active, Civic Platform generates a work order. If the schedule's status is not active, Civic Platform does not execute a work order after the expiration date.
Template	Select the name of the work order template used for the schedule.
Time Interval	Enter the number of days/weeks/months/years between work orders generated for scheduled maintenance tasks.
Trigger By	Enter the date you used as the basis of the next maintenance due date. You can set this field to the Opened Date, Scheduled Date, or Completed Date of the last PM work order.
Trigger Date	Enter the first date that the scheduled maintenance is due.
Usage Interval	Enter the usage interval between scheduled maintenance activities. For example, the number of miles or runtime hours. If you specify a usage interval, Civic Platform checks the usage interval prior to the time interval. If you did not enter a usage interval, Civic Platform generates work orders based on the time interval only.

Creating a Global Search Index Batch Job

The underlying engine for Civic Platform global search is the Apache Lucene full-text search engine. You must create and execute a batch job to build the initial index files on the index server with the current database data. It is best practice to execute batch jobs after you finish running all data conversion loading jobs. After you build the initial index, the index server automatically updates the index with the transaction data that users enter into the database through Civic Platform. There is no need to frequently rebuild the index, for example, no need to run the batch job daily or weekly.

You can define the batch job to support the global search for one or more objects including records, addresses, licensed professionals, assets, parcels, documents, and contacts. By default, the batch job supports all the mentioned objects. You can modify the supporting scope by configuring the Standard Choice GLOBAL_SEARCH_BUILD_INDEX_ENTITIES.

To create a global search index batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New** and complete the Batch Job fields as described below.

Name	Rebuild Index
Description	Add the description for the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template named NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select job type “ System ” from this drop-down menu.
Service Category	Global Search Rebuild Index.

3. Click **Submit**.

Civic Platform saves the batch job details.

4. Click the **Job Schedule** tab.

5. Define the batch job schedule, including the start time, the start date, and the frequency. Refer to [Table 138: Job Schedule Field Descriptions](#) for a list of field definitions.



Note:

There are only two options, “Once” and “Monthly,” of the frequency with which the Global Search Index batch job runs.

6. Click **Save**.

7. If at any time you want to review the batch job history, click the **Log** tab. See [Viewing the Batch Job Log](#).

Civic Platform displays the list of completed Rebuild Index batch jobs.

Creating a GIS Asset Sync Batch Job

You can create a batch job that automatically updates an asset type with any information entered for asset records of that asset type in Accela GIS. For example, an agency worker in the field is observing multiple hydrants over the course of a week. You can create a batch job that takes all information that users add to records of the type Hydrant and that run each Friday afternoon. All information you enter in the field using Accela GIS also enters in the corresponding asset records. Schedule this batch job to run at regular intervals so that information gathered in Accela GIS is regularly and automatically incorporated into your regular asset records.



Note:

If you want to copy attribute information in the sync batch job, you must link the GIS attribute fields with attribute fields in Accela Civic Platform - Asset before running the synchronization. See [Asset Types](#).

To create a new GIS asset synch batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New**.

Civic Platform displays the New Batch Job portlet.

3. Complete the following required fields:

Name	Enter an intuitive name for the batch job.
Description	Enter a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template named NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select job type “ System ” from this drop-down menu.
Service Category	After you select the Service job type from the Job Type drop-down menu, the Service Category drop-down menu displays. Select Asset Sync .

4. Click **Submit**.

Civic Platform creates the batch job and then displays the Batch Job Detail portlet.

5. Associate asset types to the batch job by completing the following steps:

a. Click the **Asset Type** tab.

Civic Platform displays the Asset Type portlet.

b. Click **Look Up**.

Civic Platform displays the Asset Type Search portlet.

c. Complete any fields that display. For a description of the fields, see [Table 140: Batch Job Asset Type Fields](#).

d. Click Submit.

Civic Platform returns a list of asset types that match your search criteria.

Job Name: Asset											
<input type="button" value="Menu"/> <input type="button" value="Select"/> <input type="button" value="Look Up"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>											
<input type="button" value="Job Detail"/> <input type="button" value="Job Schedule"/> <input type="button" value="Asset Type (0)"/> <input type="button" value="Log (0)"/>											
Icon	Asset Group	Asset Type	Class Type	Template ID	Asset Type Code	Asset ID Mask	Description	Comments	Updated Date	Updated By	Record Status
<input type="checkbox"/>	Building	Flagstaff...	Linear	AAM0821					10/17/2012	ADMIN	Active
<input type="checkbox"/>	Water	Water Line	Linear	Water Line					10/17/2012	ADMIN	Active

e. Click the asset type(s) you want to add to the batch job.

f. Click Select.

Civic Platform adds the asset type(s) to the batch job.

Job Name: Asset										
<input type="button" value="Menu"/> <input type="button" value="Look Up"/> <input type="button" value="Delete"/> <input type="button" value="Help"/>										
<input type="button" value="Job Detail"/> <input type="button" value="Job Schedule"/> <input type="button" value="Asset Type (2)"/> <input type="button" value="Log (0)"/>										
2 record(s) added successfully.										
Icon	Asset Group	Asset Type	Class Type	Template ID						
<input type="checkbox"/>	Building	Flagstaff...	Linear	AAM0821						
<input type="checkbox"/>	Water	Water Line	Linear	Water Line						

6. Define the Job Schedule by completing the following steps:

a. Click the Job Schedule tab.

Civic Platform displays the Job Schedule portlet.

Job Name: Inspector										
<input type="button" value="Menu"/> <input type="button" value="Save"/> <input type="button" value="Reset"/> <input type="button" value="Help"/>										
<input type="button" value="Job Detail"/> <input type="button" value="Job Schedule"/> <input type="button" value="PM Schedule (1)"/> <input type="button" value="Log (0)"/>										
Frequency	Once	Start Date		End Date	Schedule Status	On Hold				
Start Time	01	: 00	AM		Time Out (seconds)					
PM Generate*		<input type="button" value="Select..."/>								

b. Complete the following fields:

Start Time

Determine the time of day at which the batch job begins running by selecting hour, minute, and a.m./p.m. from drop-down menus.

If you set a batch job Schedule Status to **Active** but do not specify a Start Time, an error message displays when you try to save the batch job.

Schedule Status

Use this drop-down menu to turn a batch job on and off. Select **Active** to activate the batch job. Select **On Hold** to deactivate the batch job and save its information.

Start Date

Enter the date on which the batch job starts or select a date by clicking on the data picker beside the field.

If you set a batch job Schedule Status to **Active** but do not specify a Start Date, an error message displays when you try to save the batch job.

Time Out (seconds)

Enter the number of seconds a batch job attempts to run before timing out.

Frequency

Select the frequency with which the batch job runs from this drop-down menu. Batch jobs can run one time, daily, weekly, monthly, or yearly.

End Date	If you select a value other than Once in the Frequency field, the End Date field becomes active. Enter the date on which the batch job stops running or select a date by clicking on the data picker beside the field.
PM Generate	<p>PM Generate is a required field that enables you to determine how far in advance the batch job generates work orders. Enter a number in the first field, then select Days, Weeks, Months, or Years from the drop-down menu in the second field.</p> <p>For example, to generate work orders two weeks in advance of the PM Schedule batch job, enter 2 in the numeric field and select Weeks from the drop-down menu. Or, enter 15 in the numeric field and select Days from the drop-down menu.</p>

c. Click Save.

Civic Platform saves the Job Schedule the batch job.

Table 140: Batch Job Asset Type Fields

Asset Group	Use the drop-down menu to select the asset group.
Asset ID Mask	Use the drop-down menu to select the default prefix for the asset type you are looking for. An ID mask can contain strings that show part of the application number that Civic Platform recognizes and acts on before showing the application number.
Asset Type	Enter an asset type.
Asset Type Code	Enter an asset type code.
Class Type	Select an asset class type from this drop-down menu.
Comments	Comments in the asset type record.
Description	The description field of the asset type you are searching for.
GIS ID for Asset ID	The GIS ID field that you want to map to the asset ID. If you specify a related table, this drop-down list is populated with the fields in the table. Otherwise, this drop-down list is populated with the fields in the GIS layer (feature class).
GIS Layer	The GIS layer on the selected GIS service that stores the GIS objects. In Esri ArcMap, a feature class is represented visually on the map as a layer.
GIS Service	The GIS service that stores the information about GIS objects. The GIS services listed on the dropdown list are configured in Accela GIS administration site.
Master Inventory in GIS	This read-only option indicates whether the asset type is present in the inventory of all mapped objects in Accela GIS.
Record Status	Select Active, Inactive, or All from this drop-down menu.
Template ID	Select a template from this drop-down menu.

Creating a Batch Job for Expired License Email Notifications

Civic Platform can scan licensed professionals for all expired licenses and insurance coverage lapses, and then send email notifications to all of the appropriate parties. Create a batch job for expired email notifications by configuring the Send License Expired Email batch job category and defining the batch job schedule.

To create a batch job for expired email notifications

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click **New**.
3. Complete the fields as described below:

Name	Enter a Name for the batch job.
Description	Provide a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select the job type “ System ” from this drop-down menu.
Service Category	Send License Expired Email

4. Click **Submit**.
5. Click the **Job Schedule** tab.
6. Define the batch job schedule. Complete the fields as described in [Table 138: Job Schedule Field Descriptions](#)
7. Click **Save**.

Creating a Proxy User Process Batch Job

You can create a batch job that sets the delegate invitations to expire on the expiration day or to purge the expired or declined invitations after the purge day arrives. The batch job runs at an interval you determine. You configure the expiration day and purge day in Citizen Access administration. For more information see “Delegates Settings” in the Citizen Access Administrator Guide.

To create a proxy user process batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click **New**.
3. Complete the following fields:

Name	Enter a Name for the batch job.
Description	Provide a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select the job type “ System ” from this drop-down menu.
Service Category	Proxy User Process

4. Click **Submit**.
5. Click the **Job Schedule** tab.
6. Define the batch job schedule. Complete the fields as described in [Table 138: Job Schedule Field Descriptions](#). Best practice is to set the **Frequency** to **Daily**.
7. Click **Save**.

If at any time you want to review the batch job history, click the Log tab. See [Viewing the Batch Job Log](#).

Creating a Script Batch Job

You can create a batch job for running a script on a regular schedule that you define. For example, you create a script that deletes partially completed applications, and then create a batch job to associate with the script. The batch job regularly removes partially completed applications from Civic Platform.

To create a script batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New**.

3. Complete the following fields:

Name	Enter a Name for the batch job.
Description	Provide a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select the Script job type from this drop-down menu.
Script Code	From the drop-down list select the script that you want to associate with the batch job. For information on creating a script, see the “Event and Script Setup” chapter in the <i>Accela Civic Platform Scripting Guide</i> .

4. Click **Submit**.

5. Specify the job schedule to run the batch job by completing the following steps:

a. Click the **Job Schedule** tab.

b. Define the batch job schedule. Complete the fields as described in [Table 138: Job Schedule Field Descriptions](#).

c. Click **Save**.

6. Specify the default values of the parameters required to run the script by completing the following steps:

a. Click the **Parameters** tab.

Civic Platform displays the Parameters portlet.

Parameter Name	Description	Data Type	Required Flag	Status	Default Value
0 record(s) found.					

b. Click **New**.

Civic Platform displays the New Parameter portlet.

The screenshot shows a software interface for creating a job. At the top, there are buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. Below these are tabs for 'Job Detail', 'Job Schedule', 'Parameters (0)', and 'Log (0)'. The 'Parameters (0)' tab is active. The form contains several input fields: 'Parameter Name *' (with a red asterisk), 'Data Type *' (set to '-Select-'), 'Required Flag *' (set to '-Select-'), 'Default Value', 'Status *' (set to '-Select-'), 'Description' (a large text area), and 'Display Order'.

c. Complete any fields that display. For a description of the fields, see [Table 141: Script Batch Job Parameters](#).

d. Click **Submit**.

Table 141: Script Batch Job Parameters

Data Type	Enter the data type of the parameter. The data type must correspond to the data type defined for the parameter in the script.
Default Value	Assign a value to the parameter for the script to run.
Description	Enter a description for the parameter.
Display Order	Not applicable.
Parameter Name	Enter the name of the parameter.
Required Flag	Select the required flag as Yes.
Status	Use the drop-down to select if the parameter record is active or inactive for the script.

Creating a Geotagging Batch Job

Geotagging is the process of adding geometry information to various objects, to enable users to perform nearby queries or spatial queries.

- A nearby query searches for records, inspections, and asset condition assessments within the map extent, within one or more selected GIS features, or near one or more selected GIS features.
- A spatial query searches for assets which are near to a selected GIS feature, so that users can link the assets to a PM schedule.

You can create a batch job that automatically geotags all existing data objects in the Civic Platform database, including geocoded addresses and GIS features. Civic Platform also automatically geotags new data objects one by one when users select new geocoded addresses or GIS features from the map and associate them with an asset, a parcel, or a record that exists in Civic Platform.

Associating a record, an inspection, an asset or a condition assessment with geotagged data objects enables users to find the item within the map extent, within one or more selected GIS features, or near one or more selected GIS features.

**Note:**

To geotag addresses, make sure that Civic Platform can connect to a map integration environment that has a geocoding service and you have set that map integration environment as the default map service for Civic Platform.

For information about how to define a geocoding service, see "Retrieving and Selecting a Geocoding Service" in the Accela Civic Platform GIS Administrator Guide.

For information about how to set a default map service for Civic Platform, see "Configuring GIS Services in Civic Platform" in the Accela Civic Platform GIS Administrator Guide.

To create a new geotagging batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New**.

Civic Platform displays the New Batch Job portlet.

3. Complete the following required fields:

Name	Enter an intuitive name for the batch job.
Description	Enter a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, whether the job is successful or not. You can configure the email template named NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification content. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select System job type from this drop-down menu.
Service Category	After you select System job type from the Job Type drop-down menu, the Service Category drop-down menu displays. Select the batch job you want to create, in this example, Geotagging Existing Record .

4. Click **Submit**.

Civic Platform creates the batch job and then displays the Batch Job Detail portlet.

5. Specify the job schedule to run the batch job by completing the following steps:

- a. Click the **Job Schedule** tab.

- b. Define the batch job schedule. Complete the fields as described in [Table 138: Job Schedule Field Descriptions](#).

Best practice is to set the **Frequency** to **Once**.

- c. Click **Save**.

Creating a Batch Job for Rebuilding Asset Calendar Index

The asset calendar becomes available from Civic Platform 7.3 FP1. For the calendar to display asset events that occurred before you upgrade Civic Platform to 7.3 FP1, you must build indexes for asset events on the index server.

**Note:**

The index server can automatically update the index with all the asset events that occur after Civic Platform upgrades to 7.3 FP1.

Before you create a batch job for rebuilding asset calendar index, you must configure the Standard Choice ASSET CALENDAR BUILD INDEX DURATION. This Standard Choice defines the start date and end date of a duration. The batch job only builds indexes for the asset events whose event time (for example, event schedule time) falls in the duration. For more information about the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

To create a batch job for rebuilding asset calendar index

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New**.

Civic Platform displays the New Batch Job portlet.

3. Complete the following required fields:

Name	Enter an intuitive name for the batch job.
Description	Enter a description about the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not.
Job Server	Select the server for running the batch job.
Job Type	Select System from this drop-down menu.
Service Category	Select Asset Calendar Rebuild Index from this drop-down menu.

4. Click **Submit**.

Civic Platform creates the batch job and then displays the Batch Job Detail portlet.

5. Specify the job schedule to run the batch job by completing the following steps:

a. Click the **Job Schedule** tab.

b. Define the batch job schedule. Complete the fields as described in [Table 138: Job Schedule Field Descriptions](#).

Best practice is to set the **Frequency** to **Once**.

c. Click **Save**.

Creating an Optimized Inspection Route Batch Job

You can create a batch job to generate the sequence of inspection route sheet items for each inspector, based on the start location, the end location, and the default route type in the inspector's user profile. See [Inspections](#) for a description of the three fields.

The inspection route sheet items are the inspections scheduled for the next available day or the day after that, depending on when you run the batch job. For example, if you run the batch job between September 15, 10:00 pm and September 16, 10:00 pm, the batch job generates the sequence of inspections scheduled between September 16, 10:00 pm and September 17, 10:00 pm. If you run the batch job between September 16, 10:00 pm and September 17, 10:00 pm, the batch job generates the sequence of the inspections scheduled between September 17, 10:00 pm and September 18, 10:00 pm.

You can run this batch job at the end of the prior day for the next day's jobs, or at the middle of the night. Supervisors can also manipulate the order of the route sheet items after the automatic generation.

To create an Optimized Inspection Route batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New**.

Civic Platform displays the New Batch Job portlet.

3. Complete the following required fields:

Name	Enter an intuitive name for the batch job.
Description	Enter a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, whether the job is successful or not. You can configure the email template named NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification content.
Job Server	Select the server for running the batch job.
Job Type	Select System job type from this drop-down menu.
Service Category	After you select System job type from the Job Type drop-down menu, the Service Category drop-down menu displays. Select the batch job you want to create, in this example, Optimize Inspection Route .

4. Click **Submit**.

Civic Platform creates the batch job and then displays the Batch Job Detail portlet.

5. Specify the job schedule to run the batch job by completing the following steps:

- a. Click the **Job Schedule** tab.
- b. Define the batch job schedule. Complete the fields as described in [Table 138: Job Schedule Field Descriptions](#).
- c. Click **Save**.

Editing a Batch Job

You can edit the job schedule for a batch job at any time. Refresh the page to implement the change. After you have created a batch job you can only edit the Job Description field in the Job Details portlet.

You can add and remove PM schedules and asset types to from PM Schedule and Asset GIS Sync batch jobs, respectively, at any time after you create the batch job.

Topics

- [Editing the Job Schedule and Description](#)
- [Adding a PM Schedule to an Existing Batch Job](#)
- [Removing a PM Schedule from an Existing Batch Job](#)
- [Adding an Asset Type to an Existing Batch Job](#)
- [Removing an Asset Type from an Existing Batch Job](#)
- [Adding a Parameter to an Existing Batch Job](#)
- [Removing a Parameter from an Existing Batch Job](#)

Editing the Job Schedule and Description

You can edit the job schedule and its description for any batch job after you have created it.

To edit a batch job

1. Access the Batch Jobs portlet ([Navigating to the Setup Portlet](#)).
2. Click the link of the batch job you want to edit.

Civic Platform displays the Batch Job Details portlet.

3. If the job is not currently running, you can make the following changes to the batch job:

- Modify the Job Description field in the Job Detail tab.
- Modify any fields in the Job Schedule tab.
- Modify the association of the batch job with PM schedule or the asset type.

4. Click **Save**.

Civic Platform saves the changes to the batch job. Refresh the page to implement the changes.

Adding a PM Schedule to an Existing Batch Job

Add additional PM schedules to an existing batch job.

To add a PM schedule to an existing batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click the link of the batch job you want to edit.
Civic Platform displays the Batch Job Details portlet.
3. Click the **PM Schedule** tab.
Civic Platform displays the PM Schedule list portlet.
4. Click **Look Up**.
Civic Platform displays the PM Schedule Search portlet.
5. Complete any fields that display. For a description of the fields, see [Table 139: Batch Job PM Schedule Fields](#).
6. Click **Submit**.
Civic Platform returns a list of PM Schedules that match your search criteria.
7. Click the PM Schedule(s) you want to add to the batch job.
8. Click **Select**.
Civic Platform adds the PM Schedule to the batch job.

Removing a PM Schedule from an Existing Batch Job

To remove a PM Schedule from a PM Schedule batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click the link of the batch job you want to edit.
Civic Platform displays the Batch Job Details portlet.
3. Click the **PM Schedule** tab.
Civic Platform displays the PM Schedule list portlet.
4. Select the PM Schedule(s) you want to remove from the batch job.
5. Click **Delete**.
Civic Platform removes the PM Schedule from the batch job.

Adding an Asset Type to an Existing Batch Job

Add asset types to an existing batch job to broaden the number of asset records that update with GIS information when the batch job runs.

To add an asset type to an existing asset/GIS sync batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click the link of the batch job you want to edit.
Civic Platform displays the Batch Job Details portlet.
3. Click the **Asset Type** tab.
Civic Platform displays the Asset Type portlet.
4. Click **Look Up**.
Civic Platform displays the Asset Type Search portlet.
5. Complete any fields that display. For a description of the fields, see [Table 140: Batch Job Asset Type Fields](#).
6. Click **Submit**.
Civic Platform returns a list of asset types that match your search criteria.
7. Click the asset type(s) you want to add to the batch job.
8. Click **Select**.
Civic Platform adds the asset type(s) to the batch job.

Removing an Asset Type from an Existing Batch Job

To remove an asset type from an existing asset/GIS sync batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click the link of the batch job you want to edit.
Civic Platform displays the Batch Job Details portlet.
3. Click the **Asset Type** tab.
Civic Platform displays the Asset Type portlet.
4. Select the asset type(s) you want to remove from the batch job.
5. Click **Delete**.
Civic Platform removes the asset type(s) from the batch job.

Adding a Parameter to an Existing Batch Job

Add additional parameters to an existing script batch job.

To add a parameter to an existing script batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click the link of the script batch job you want to edit.
Civic Platform displays the Batch Job Details portlet.
3. Click the **Parameters** tab.

Civic Platform displays the Parameters list portlet.

4. Click **New**.

Civic Platform displays the New Parameter portlet.

5. Complete any fields that display. For a description of the fields, see [Table 141: Script Batch Job Parameters](#).

6. Click **Submit**.

Civic Platform adds the parameter to the batch job.

Removing a Parameter from an Existing Batch Job

To remove a parameter from a script batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click the link of the batch job you want to edit.

Civic Platform displays the Batch Job Details portlet.

3. Click the **Parameters** tab.

Civic Platform displays the Parameters list portlet.

4. Select the parameter(s) you want to remove from the batch job.

5. Click **Delete**.

Civic Platform removes the parameter(s) from the batch job.

Deleting a Batch Job

You can only delete a batch job when it is not running in the process queue. You must also remove any associated PM schedules and asset types from a batch job to delete it. For instructions on removing PM schedules and asset types, see [Removing an Asset Type from an Existing Batch Job](#) and [Removing an Asset Type from an Existing Batch Job](#). For instructions on terminating a running batch job, see [Terminating a Batch Job](#).

To delete a batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Select the batch job(s) you want to delete.

3. Ensure that the batch job is not running by checking its **Job Status** column.

Batch Jobs					
	Name	Job Type	E-mail	Service Category	Schedule Status
<input type="checkbox"/>	DEMO_SCRP_	Script			On Hold
<input type="checkbox"/>	Email_	URL			Active
<input type="checkbox"/>	ReportDem_	Report			On Hold
<input type="checkbox"/>	Test_EMSE_	Script			On Hold
<input type="checkbox"/>	2222_	URL			On Hold
<input type="checkbox"/>	Global Se_	System		Global Search Rebuild Index	On Hold
<input type="checkbox"/>	DEMO_REPO_	Report			On Hold
<input type="checkbox"/>	Script_test	Script	kenny.hu@...		On Hold
<input type="checkbox"/>	Test_EMSE_	Script			Active
<input type="checkbox"/>	WorkflowU_	URL			Not Scheduled

If the job is running, follow the steps outlined in [Terminating a Batch Job](#).

4. Ensure that the batch job has no PM schedules or asset types by checking the **PM Schedule** or **Asset Type** tabs.

If there are PM schedules, follow the steps outlined in [Removing an Asset Type from an Existing Batch Job](#).

If there are asset types, follow the steps outlined in [Removing an Asset Type from an Existing Batch Job](#).

5. Click **Delete**.

Civic Platform deletes the batch job.

Searching for a Batch Job

You can locate a batch job by any of these criteria, Name, Job Type, Schedule Status, and Job Status.

To find a batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **Search**.

Civic Platform displays the Batch Job Search portlet.

The screenshot shows a web-based form titled "Batch Jobs". At the top right are buttons for "Menu", "Submit", "Reset", "Cancel", and "Help". Below these are several input fields: "Name" (text input), "Job Type" (dropdown menu), "E-mail" (text input), "Description" (text area), "Schedule Status" (dropdown menu), and "Job Status" (dropdown menu). A "check spelling" button is located at the bottom right of the form area.

3. Complete any of the following fields:

Name	Enter the batch job name.
Description	Enter a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Type	Select the job type from this drop-down menu.
Schedule Status	Select the Job Schedule Status from this drop-down menu. Job schedules can be either Active or On Hold .
Job Status	Select the batch job's status from this drop-down menu. Available values are Complete, Running, In Process Queue, and Terminated.

4. Click **Submit**.

Civic Platform returns a list of batch jobs that match your search criteria.

Creating a PM Schedule Batch Jobs

You can create a batch job that automatically generates work orders in advance of a scheduled preventative maintenance. The batch job generates all work orders associated with the PM schedule in a time frame you determine. Schedule the batch job to correspond with the PM schedule so that Civic Platform generates work orders at the same time interval as the PM schedule.

To create a new preventative maintenance schedule batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New**.

Civic Platform displays the New Batch Job portlet.

3. Complete the following required fields:

Name	Enter an intuitive name for the batch job.
Description	Enter a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template named NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select job type “ System ” from this drop-down menu.
Service Category	After you select job type “ System ” from the Job Type drop-down menu, the Service Category drop-down menu displays. Select the batch job you want to create, in this example, PM Schedule .

4. Click **Submit**.

Civic Platform creates the batch job and then displays the Batch Job Detail portlet.

The screenshot shows the 'Batch Job Detail' portlet. At the top, it displays 'Job Name: PM JOB 04' with buttons for 'Menu', 'Save', 'Stop', 'Reset', and 'Help'. Below this is a navigation bar with tabs: 'Job Detail' (selected), 'Job Schedule', and 'Log (0)'. A message 'The batch job was created successfully.' is displayed. The main area contains the following details:

Job Type	Name	Service Category
System	PM JOB 04	PM Schedule
Description		
<input type="text"/>		
check spelling		
Job Server		
<input type="button" value="--Select--"/>		
E-mail		
<input type="text"/>		

5. Associate PM Schedules to the batch job by completing the following steps:

a. Select the **PM Schedule** option from the **Service Category** drop-down menu.

Civic Platform displays the New PM Schedule Batch Job portlet.

b. Click the **PM Schedule** tab.

Civic Platform displays the PM Schedule List tab.

The screenshot shows the 'PM Schedule List' tab. At the top, it displays 'Job Name: Inspector' with buttons for 'Menu', 'Look Up', 'Delete', and 'Help'. Below this is a navigation bar with tabs: 'Job Detail', 'Job Schedule', 'PM Schedule (0)', and 'Log (0)'. The main area contains a table header with columns: 'Schedule Name', 'Template Name', 'Schedule Status', 'Start Date', and 'Next Schedule Date'. Below the header, a message '0 record(s) found.' is displayed.

c. Click **Look Up.**

Civic Platform displays the PM Schedule Search portlet.

Job Name: Inspector

Menu

Job Detail Job Schedule PM Schedule (0) Log (0)

Schedule Name	Template --Select--	Schedule Status --Select--
Start Date From <input type="text"/> To <input type="text"/>	Next Schedule Date From <input type="text"/> To <input type="text"/>	Trigger By --Select--
Time Interval From <input type="text"/> To <input type="text"/> --Select--	Usage Interval From <input type="text"/> To <input type="text"/> --Select--	<input type="checkbox"/> Generate Single Work Order for All Assets
<input type="checkbox"/> Generate Work Order If Previous One Opened	<input type="checkbox"/> Generate Work Orders for Child Assets up to <input type="text"/> level(s)	<input type="checkbox"/> Include Child Assets in Parent item's Work Order
<input type="checkbox"/> Link Asset Addresses to Work Orders	<input type="checkbox"/> Primary Asset Address Only	<input type="checkbox"/> Include Addresses in Asset's Work Order
<input type="checkbox"/> Generate Single Work Order for all Addresses	Asset Group --Select--	Asset Type --Select--
Asset ID <input type="text"/>	Class Type --Select--	Comments <input type="text"/>
Record Status Active <input type="button" value="Select"/>		

d. Complete any fields that display. For a description of the fields, see [Table 143: Batch Job PM Schedule Fields](#).

e. Click **Submit.**

Civic Platform displays a list of PM Schedules that match your search criteria.

Job Name: Inspector

Menu

Job Detail Job Schedule PM Schedule (0) Log (0)

Schedule Name	Template Name	Schedule Status	Start Date	Next Schedule Date	Trigger By	Time Interval	Time Interval Type
PM Sched...	WO TEMPLATE	Active	11/10/2010	11/01/2012	Scheduled Date	1	Day

f. Click the PM Schedules you want to add to the batch job.

Select only active PM Schedules you have not already assigned to the batch job. Otherwise, an error message displays.

g. Click **Select.**

Civic Platform associates the PM Schedule(s) to the batch job.

Job Name: Inspector

Menu

Job Detail Job Schedule PM Schedule (1) Log (0)

1 record(s) added successfully.

Schedule Name	Template Name	Schedule Status	Start Date	Next Schedule Date	Trigger By	Time Interval	Time Interval Type
PM Sched...	WO TEMPLATE	Active	11/10/2010	11/01/2012	Scheduled Date	1	Day

h. To remove a PM Schedule from a batch job, select it and click **Delete.**

6. Define the Job Schedule by completing the following steps:

a. Click the **Job Schedule tab.**

Civic Platform displays the Job Schedule portlet.

The screenshot shows the 'Job Schedule' tab selected in the top navigation bar. The 'Frequency' field is set to 'Once'. The 'Start Date' and 'End Date' fields are empty. The 'Schedule Status' is set to 'On Hold'. The 'Start Time' is set to '01:00 AM'. The 'Time Out (seconds)' field is empty. Below the main form, there is a 'PM Generate' section with a numeric input field containing '1' and a dropdown menu labeled 'Select--'.

b. Complete the following fields as described in [Table 142: Job Schedule Field Descriptions](#).

c. Click **Save**.

Civic Platform saves the batch job.

d. [Table 142: Job Schedule Field Descriptions](#)

End Date	If you select a value other than Once in the Frequency field, the End Date field activates. Enter the date on which the batch job stops running or select a date by clicking on the data picker beside the field.
Frequency	Select the frequency with which the batch job runs from this drop-down menu. Batch jobs can run once, daily, weekly, monthly, or yearly.
PM Generate	PM Generate is a required field that enables you to specify how far in advance the batch job generates work orders. Enter a number in the first field, then select Days, Weeks, Months, or Years from the drop-down menu in the second field. For example, to generate work orders two weeks in advance of the PM Schedule batch job, enter 2 in the numeric field and select Weeks from the drop-down menu. Or, enter 15 in the numeric field and select Days from the drop-down menu.
Schedule Status	Use this drop-down menu to turn a batch job on and off. Select Active to activate the batch job. Select On Hold to deactivate the batch job and save its information.
Start Date	Enter the date on which the batch job starts or select a date by clicking on the data picker beside the field. If you set a batch job Schedule Status to Active but do not specify a Start Date, an error message displays when you try to save the batch job.
Start Time	Determine the time of day at which the batch job begins running by selecting hour, minute, and a.m./p.m. from drop-down menus. If you set a batch job Schedule Status to Active but do not specify a Start Time, an error message displays when you try to save the batch job.
Time Out (seconds)	Enter the number of seconds a batch job attempts to run before timing out.

Table 143: Batch Job PM Schedule Fields

Asset Group	Enter the Asset Group Code.
Asset ID	Enter the Asset ID of an asset that belongs to the asset type you are looking for.
Asset Type	Enter the name of the asset type you are looking for.
Comments	Enter any comments associated with the maintenance schedule.
Generate Single Work Order for All Addresses	Select this option to create a work order for each asset address linked to this PM schedule. Otherwise, the PM schedule creates a single work order for all addresses. This option is not active if you select the Include Addresses in Asset's Work Order option.

Generate Single Work Order for All Assets	Select this option to create a work order for each asset linked to this PM schedule. Otherwise, the PM schedule creates a single work order for all linked assets.
Generate Work Orders for Child Assets up to n level(s)	Select this option to create work orders for linked assets and their child assets up to three levels.
Generate Work Order if Previous One Opened	Select this option to allow the PM schedule to create a work order for an asset that has a previous work order still open.
Include Addresses in Asset's Work Order	Select this option to include the addresses linked to the PM schedule in asset work orders created by the schedule.
Include Child Assets in Parent item's Work Order	This option becomes active when you check the Generate Work Orders for Child Assets up to n level(s) box. Select this option to create one work order for a parent asset and its child assets. Otherwise, each child asset receives a work order.
Link Asset Addresses to Work Orders	Check this box to show an asset's addresses in work orders created for that asset.
Primary Only	This option becomes active when you check the Link Asset Addresses to Work Orders box. Check this box to show only an asset's primary address in work orders generated by this PM schedule.
Record Status	Select the status of the record.
Schedule Name	Enter a unique name to identify the schedule.
Schedule Status	Use this drop-down list to select the status of the scheduled maintenance. Example: Active or Expired. The status controls whether or not the maintenance schedule executes a work order. If the status is active, Civic Platform generates a work order. If the schedule's status is not active, Civic Platform does not execute a work order after the expiration date.
Template	Select the name of the work order template used for the schedule.
Time Interval	Enter the number of days/weeks/months/years between work orders generated for scheduled maintenance tasks.
Trigger By	Enter the date you used as the basis of the next maintenance due date. You can set this field to the Opened Date, Scheduled Date, or Completed Date of the last PM work order.
Trigger Date	Enter the first date that the scheduled maintenance is due.
Usage Interval	Enter the usage interval between scheduled maintenance activities. For example, the number of miles or runtime hours. If you specify a usage interval, Civic Platform checks the usage interval prior to the time interval. If you did not enter a usage interval, Civic Platform generates work orders based on the time interval only.

Creating a Global Search Index Batch Job

The underlying engine for Civic Platform global search is the Apache Lucene full-text search engine. You must create and execute a batch job to build the initial index files on the index server with the current database data. It is best practice to execute batch jobs after you finish running all data conversion loading jobs. After you build the initial index, the index server automatically updates the index with the transaction data that users enter into the database through Civic Platform. There is no need to frequently rebuild the index, for example, no need to run the batch job daily or weekly.

You can define the batch job to support the global search for one or more objects including records, addresses, licensed professionals, assets, parcels, documents, and contacts. By default, the batch job supports all the mentioned objects. You can modify the supporting scope by configuring the Standard Choice GLOBAL_SEARCH_BUILD_INDEX_ENTITIES.

To create a global search index batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New** and complete the Batch Job fields as described below.

Name	Rebuild Index
Description	Add the description for the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template named NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select job type “ System ” from this drop-down menu.
Service Category	Global Search Rebuild Index.

3. Click **Submit**.

Civic Platform saves the batch job details.

4. Click the **Job Schedule** tab.

5. Define the batch job schedule, including the start time, the start date, and the frequency. Refer to [Table 142: Job Schedule Field Descriptions](#) for a list of field definitions.



Note:

There are only two options, “Once” and “Monthly,” of the frequency with which the Global Search Index batch job runs.

6. Click **Save**.

7. If at any time you want to review the batch job history, click the **Log** tab. See [Viewing the Batch Job Log](#).

Civic Platform displays the list of completed Rebuild Index batch jobs.

Creating a GIS Asset Sync Batch Job

You can create a batch job that automatically updates an asset type with any information entered for asset records of that asset type in Accela GIS. For example, an agency worker in the field is observing multiple hydrants over the course of a week. You can create a batch job that takes all information that users add to records of the type Hydrant and that run each Friday afternoon. All information you enter in the field using Accela GIS also enters in the corresponding asset records. Schedule this batch job to run at regular intervals so that information gathered in Accela GIS is regularly and automatically incorporated into your regular asset records.



Note:

If you want to copy attribute information in the sync batch job, you must link the GIS attribute fields with attribute fields in Accela Civic Platform - Asset before running the synchronization. See [Asset Types](#).

To create a new GIS asset synch batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New**.

Civic Platform displays the New Batch Job portlet.

3. Complete the following required fields:

Name	Enter an intuitive name for the batch job.
Description	Enter a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template named NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select job type “ System ” from this drop-down menu.
Service Category	After you select the Service job type from the Job Type drop-down menu, the Service Category drop-down menu displays. Select Asset Sync .

4. Click **Submit**.

Civic Platform creates the batch job and then displays the Batch Job Detail portlet.

The screenshot shows the 'Batch Job Detail' portlet. At the top, there are buttons for 'Menu', 'Save', 'Stop', 'Reset', 'Help', 'Data Language', and 'English (US)'. Below these are tabs for 'Job Detail', 'Job Schedule', 'Asset Type (0)', and 'Log (0)'. A message 'The batch job was created successfully.' is displayed above the form fields. The 'Name' field contains 'Asset'. The 'Job Type' dropdown is set to 'System'. The 'Description' field is empty. The 'E-mail' field has a placeholder 'Email'. The 'Service Category' dropdown is set to 'Asset/GIS Sync'. The 'Job Server' dropdown is labeled '-Select-'.

5. Associate asset types to the batch job by completing the following steps:

a. Click the **Asset Type** tab.

Civic Platform displays the Asset Type portlet.

The screenshot shows the 'Asset Type' portlet. At the top, there are buttons for 'Job Name: Asset', 'Menu', 'Look Up', 'Delete', and 'Help'. Below these are tabs for 'Job Detail', 'Job Schedule', 'Asset Type (0)', and 'Log (0)'. A header row includes 'Icon', 'Asset Group', 'Asset Type', 'Class Type', and 'Template ID'. A message '0 record(s) found.' is displayed below the table.

b. Click **Look Up**.

Civic Platform displays the Asset Type Search portlet.

The screenshot shows the 'Asset Type Search' portlet. At the top, there are buttons for 'Job Name: Asset', 'Submit', 'Reset', 'Cancel', and 'Help'. Below these are tabs for 'Job Detail', 'Job Schedule', 'Asset Type (0)', and 'Log (0)'. The search form includes fields for 'Asset Group' (dropdown), 'Asset Type' (text input), 'Class Type' (dropdown), 'Asset ID Mask' (dropdown), 'Record Status' (dropdown), and 'GIS Layer' (dropdown). Other fields include 'Template ID' (dropdown), 'Description' (text area), 'Comments' (text area), 'GIS Service' (dropdown), 'Asset Type Code' (text input), 'Asset ID Mask' (dropdown), 'Asset Type as Resource' (checkbox), 'Master Inventory in GIS' (checkbox), 'GIS ID for Asset ID' (dropdown), and 'Comments' (text area).

c. Complete any fields that display. For a description of the fields, see [Table 144: Batch Job Asset Type Fields](#).

d. Click **Submit**.

Civic Platform returns a list of asset types that match your search criteria.

Icon	Asset Group	Asset Type	Class Type	Template ID	Asset Type Code	Asset ID Mask	Description	Comments	Updated Date	Updated By	Record Status
	Building	Flagstaff...	Linear	AAM0821					10/17/2012	ADMIN	Active
	Water	Water Line	Linear		Water Line				10/17/2012	ADMIN	Active

- e. Click the asset type(s) you want to add to the batch job.

- f. Click **Select**.

Civic Platform adds the asset type(s) to the batch job.

Icon	Asset Group	Asset Type	Class Type	Template ID
	Building	Flagstaff...	Linear	AAM0821
	Water	Water Line	Linear	Water Line

6. Define the Job Schedule by completing the following steps:

- a. Click the **Job Schedule** tab.

Civic Platform displays the Job Schedule portlet.

Job Name: Inspector	Save	Reset	Help
Job Detail	Job Schedule	PM Schedule (1)	Log (0)
Frequency Once	Start Date <input type="text"/>	End Date <input type="text"/>	Schedule Status On Hold
Start Time 01 : 00 : AM	Time Out (seconds) <input type="text"/>	PM Generate: <input type="button"/> -Select--	

- b. Complete the following fields:

Start Time

Determine the time of day at which the batch job begins running by selecting hour, minute, and a.m./p.m. from drop-down menus.

If you set a batch job Schedule Status to **Active** but do not specify a Start Time, an error message displays when you try to save the batch job.

Schedule Status

Use this drop-down menu to turn a batch job on and off. Select **Active** to activate the batch job. Select **On Hold** to deactivate the batch job and save its information.

Start Date

Enter the date on which the batch job starts or select a date by clicking on the data picker beside the field.

If you set a batch job Schedule Status to **Active** but do not specify a Start Date, an error message displays when you try to save the batch job.

Time Out (seconds)

Enter the number of seconds a batch job attempts to run before timing out.

Frequency

Select the frequency with which the batch job runs from this drop-down menu. Batch jobs can run one time, daily, weekly, monthly, or yearly.

End Date

If you select a value other than Once in the **Frequency** field, the **End Date** field becomes active. Enter the date on which the batch job stops running or select a date by clicking on the data picker beside the field.

PM Generate

PM Generate is a required field that enables you to determine how far in advance the batch job generates work orders. Enter a number in the first field, then select Days, Weeks, Months, or Years from the drop-down menu in the second field.

For example, to generate work orders two weeks in advance of the PM Schedule batch job, enter 2 in the numeric field and select Weeks from the drop-down menu. Or, enter 15 in the numeric field and select Days from the drop-down menu.

c. Click Save.

Civic Platform saves the Job Schedule the batch job.

Table 144: Batch Job Asset Type Fields

Asset Group	Use the drop-down menu to select the asset group.
Asset ID Mask	Use the drop-down menu to select the default prefix for the asset type you are looking for. An ID mask can contain strings that show part of the application number that Civic Platform recognizes and acts on before showing the application number.
Asset Type	Enter an asset type.
Asset Type Code	Enter an asset type code.
Class Type	Select an asset class type from this drop-down menu.
Comments	Comments in the asset type record.
Description	The description field of the asset type you are searching for.
GIS ID for Asset ID	The GIS ID field that you want to map to the asset ID. If you specify a related table, this drop-down list is populated with the fields in the table. Otherwise, this drop-down list is populated with the fields in the GIS layer (feature class).
GIS Layer	The GIS layer on the selected GIS service that stores the GIS objects. In Esri ArcMap, a feature class is represented visually on the map as a layer.
GIS Service	The GIS service that stores the information about GIS objects. The GIS services listed on the dropdown list are configured in Accela GIS administration site.
Master Inventory in GIS	This read-only option indicates whether the asset type is present in the inventory of all mapped objects in Accela GIS.
Record Status	Select Active, Inactive, or All from this drop-down menu.
Template ID	Select a template from this drop-down menu.

Creating a Batch Job for Expired License Email Notification

Civic Platform can scan licensed professionals for all expired licenses and insurance coverage lapses, and then send email notifications to all of the appropriate parties. Create a batch job for expired email notifications by configuring the Send License Expired Email batch job category and defining the batch job schedule.

To create a batch job for expired email notifications

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click **New**.
3. Complete the fields as described below:

Name	Enter a Name for the batch job.
Description	Provide a brief description of the batch job.

Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select the job type “ System ” from this drop-down menu.
Service Category	Send License Expired Email

4. Click **Submit**.
5. Click the **Job Schedule** tab.
6. Define the batch job schedule. Complete the fields as described in [Table 142: Job Schedule Field Descriptions](#)
7. Click **Save**.

Creating a Proxy User Process Batch Job

You can create a batch job that sets the delegate invitations to expire on the expiration day or to purge the expired or declined invitations after the purge day arrives. The batch job runs at an interval you determine. You configure the expiration day and purge day in Citizen Access administration. For more information see “Delegates Settings” in the Citizen Access Administrator Guide.

To create a proxy user process batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
 2. Click **New**.
 3. Complete the following fields:

Name	Enter a Name for the batch job.
Description	Provide a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select the job type “ System ” from this drop-down menu.
Service Category	Proxy User Process
 4. Click **Submit**.
 5. Click the **Job Schedule** tab.
 6. Define the batch job schedule. Complete the fields as described in [Table 142: Job Schedule Field Descriptions](#). Best practice is to set the **Frequency** to **Daily**.
 7. Click **Save**.
- If at any time you want to review the batch job history, click the Log tab. See [Viewing the Batch Job Log](#).

Creating a Script Batch Job

You can create a batch job for running a script on a regular schedule that you define. For example, you create a script that deletes partially completed applications, and then create a batch job to associate with the script. The batch job regularly removes partially completed applications from Civic Platform.

To create a script batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New**.

3. Complete the following fields:

Name	Enter a Name for the batch job.
Description	Provide a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select the Script job type from this drop-down menu.
Script Code	From the drop-down list select the script that you want to associate with the batch job. For information on creating a script, see the “Event and Script Setup” chapter in the <i>Accela Civic Platform Scripting Guide</i> .

4. Click **Submit**.

5. Specify the job schedule to run the batch job by completing the following steps:

a. Click the **Job Schedule** tab.

b. Define the batch job schedule. Complete the fields as described in [Table 142: Job Schedule Field Descriptions](#).

c. Click **Save**.

6. Specify the default values of the parameters required to run the script by completing the following steps:

a. Click the **Parameters** tab.

Civic Platform displays the Parameters portlet.

Parameter Name	Description	Data Type	Required Flag	Status	Default Value
0 record(s) found.					

b. Click **New**.

Civic Platform displays the New Parameter portlet.

The screenshot shows a software interface for configuring script batch job parameters. At the top, there are buttons for Menu, Submit, Reset, Cancel, and Help. Below these are tabs for Job Detail, Job Schedule, Parameters (0), and Log (0). The Parameters (0) tab is selected. The form contains the following fields:

- Parameter Name ***: A text input field.
- Data Type ***: A dropdown menu with the option "-Select-".
- Required Flag ***: A dropdown menu with the option "-Select-".
- Description**: A large text area for entering a description.
- Default Value**: A text input field.
- Status ***: A dropdown menu with the option "-Select-".
- Display Order**: A text input field.

- Complete any fields that display. For a description of the fields, see [Table 145: Script Batch Job Parameters](#).
- Click **Submit**.

Table 145: Script Batch Job Parameters

Data Type	Enter the data type of the parameter. The data type must correspond to the data type defined for the parameter in the script.
Default Value	Assign a value to the parameter for the script to run.
Description	Enter a description for the parameter.
Display Order	Not applicable.
Parameter Name	Enter the name of the parameter.
Required Flag	Select the required flag as Yes.
Status	Use the drop-down to select if the parameter record is active or inactive for the script.

Creating a Geotagging Batch Job

Geotagging is the process of adding geometry information to various objects, to enable users to perform nearby queries or spatial queries.

- A nearby query searches for records, inspections, and asset condition assessments within the map extent, within one or more selected GIS features, or near one or more selected GIS features.
- A spatial query searches for assets which are near to a selected GIS feature, so that users can link the assets to a PM schedule.

You can create a batch job that automatically geotags all existing data objects in the Civic Platform database, including geocoded addresses and GIS features. Civic Platform also automatically geotags new data objects one by one when users select new geocoded addresses or GIS features from the map and associate them with an asset, a parcel, or a record that exists in Civic Platform.

Associating a record, an inspection, an asset or a condition assessment with geotagged data objects enables users to find the item within the map extent, within one or more selected GIS features, or near one or more selected GIS features.

**Note:**

To geotag addresses, make sure that Civic Platform can connect to a map integration environment that has a geocoding service and you have set that map integration environment as the default map service for Civic Platform.

For information about how to define a geocoding service, see “Retrieving and Selecting a Geocoding Service” in the Accela Civic Platform GIS Administrator Guide.

For information about how to set a default map service for Civic Platform, see “Configuring GIS Services in Civic Platform” in the Accela Civic Platform GIS Administrator Guide.

To create a new geotagging batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New**.

Civic Platform displays the New Batch Job portlet.

3. Complete the following required fields:

Name	Enter an intuitive name for the batch job.
Description	Enter a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, whether the job is successful or not. You can configure the email template named NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification content. For information about how to edit an email notification template, see Working with Communication Manager .
Job Server	Select the server for running the batch job.
Job Type	Select System job type from this drop-down menu.
Service Category	After you select System job type from the Job Type drop-down menu, the Service Category drop-down menu displays. Select the batch job you want to create, in this example, Geotagging Existing Record .

4. Click **Submit**.

Civic Platform creates the batch job and then displays the Batch Job Detail portlet.

5. Specify the job schedule to run the batch job by completing the following steps:

- a. Click the **Job Schedule** tab.

- b. Define the batch job schedule. Complete the fields as described in [Table 142: Job Schedule Field Descriptions](#).

Best practice is to set the **Frequency** to **Once**.

- c. Click **Save**.

Creating a Batch Job for Rebuilding Asset Calendar Index

The asset calendar becomes available from Civic Platform 7.3 FP1. For the calendar to display asset events that occurred before you upgrade Civic Platform to 7.3 FP1, you must build indexes for asset events on the index server.

**Note:**

The index server can automatically update the index with all the asset events that occur after Civic Platform upgrades to 7.3 FP1.

Before you create a batch job for rebuilding asset calendar index, you must configure the Standard Choice ASSET CALENDAR BUILD INDEX DURATION. This Standard Choice defines the start date and end date of a duration. The batch job only builds indexes for the asset events whose event time (for example, event schedule time) falls in the duration. For more information about the Standard Choice, refer to the *Accela Civic Platform Configuration Reference*.

To create a batch job for rebuilding asset calendar index

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New**.

Civic Platform displays the New Batch Job portlet.

3. Complete the following required fields:

Name	Enter an intuitive name for the batch job.
Description	Enter a description about the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not.
Job Server	Select the server for running the batch job.
Job Type	Select System from this drop-down menu.
Service Category	Select Asset Calendar Rebuild Index from this drop-down menu.

4. Click **Submit**.

Civic Platform creates the batch job and then displays the Batch Job Detail portlet.

5. Specify the job schedule to run the batch job by completing the following steps:

a. Click the **Job Schedule** tab.

b. Define the batch job schedule. Complete the fields as described in [Table 142: Job Schedule Field Descriptions](#).

Best practice is to set the **Frequency** to **Once**.

c. Click **Save**.

Creating an Optimized Inspection Route Batch Job

You can create a batch job to generate the sequence of inspection route sheet items for each inspector, based on the start location, the end location, and the default route type in the inspector's user profile. See [Inspections](#) for a description of the three fields.

The inspection route sheet items are the inspections scheduled for the next available day or the day after that, depending on when you run the batch job. For example, if you run the batch job between September 15, 10:00 pm and September 16, 10:00 pm, the batch job generates the sequence of inspections scheduled between September 16, 10:00 pm and September 17, 10:00 pm. If you run the batch job between September 16, 10:00 pm and September 17, 10:00 pm, the batch job generates the sequence of the inspections scheduled between September 17, 10:00 pm and September 18, 10:00 pm.

You can run this batch job at the end of the prior day for the next day's jobs, or at the middle of the night. Supervisors can also manipulate the order of the route sheet items after the automatic generation.

To create an Optimized Inspection Route batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **New**.

Civic Platform displays the New Batch Job portlet.

3. Complete the following required fields:

Name	Enter an intuitive name for the batch job.
Description	Enter a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, whether the job is successful or not. You can configure the email template named NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification content.
Job Server	Select the server for running the batch job.
Job Type	Select System job type from this drop-down menu.
Service Category	After you select System job type from the Job Type drop-down menu, the Service Category drop-down menu displays. Select the batch job you want to create, in this example, Optimize Inspection Route .

4. Click **Submit**.

Civic Platform creates the batch job and then displays the Batch Job Detail portlet.

5. Specify the job schedule to run the batch job by completing the following steps:

- a. Click the **Job Schedule** tab.
- b. Define the batch job schedule. Complete the fields as described in [Table 142: Job Schedule Field Descriptions](#).
- c. Click **Save**.

Editing Batch Jobs

You can edit the job schedule for a batch job at any time. Refresh the page to implement the change. After you have created a batch job you can only edit the Job Description field in the Job Details portlet.

You can add and remove PM schedules and asset types to from PM Schedule and Asset GIS Sync batch jobs, respectively, at any time after you create the batch job.

Topics

- [Editing the Job Schedule and Description](#)
- [Adding a PM Schedule to an Existing Batch Job](#)
- [Removing a PM Schedule from an Existing Batch Job](#)
- [Adding an Asset Type to an Existing Batch Job](#)
- [Removing an Asset Type from an Existing Batch Job](#)
- [Adding a Parameter to an Existing Batch Job](#)
- [Removing a Parameter from an Existing Batch Job](#)

Editing the Job Schedule and Description

You can edit the job schedule and its description for any batch job after you have created it.

To edit a batch job

1. Access the Batch Jobs portlet ([Navigating to the Setup Portlet](#)).

2. Click the link of the batch job you want to edit.
Civic Platform displays the Batch Job Details portlet.
3. If the job is not currently running, you can make the following changes to the batch job:
 - Modify the Job Description field in the Job Detail tab.
 - Modify any fields in the Job Schedule tab.
 - Modify the association of the batch job with PM schedule or the asset type.
4. Click **Save**.
Civic Platform saves the changes to the batch job. Refresh the page to implement the changes.

Adding a PM Schedule to an Existing Batch Job

Add additional PM schedules to an existing batch job.

To add a PM schedule to an existing batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click the link of the batch job you want to edit.
Civic Platform displays the Batch Job Details portlet.
3. Click the **PM Schedule** tab.
Civic Platform displays the PM Schedule list portlet.
4. Click **Look Up**.
Civic Platform displays the PM Schedule Search portlet.
5. Complete any fields that display. For a description of the fields, see [Table 143: Batch Job PM Schedule Fields](#).
6. Click **Submit**.
Civic Platform returns a list of PM Schedules that match your search criteria.
7. Click the PM Schedule(s) you want to add to the batch job.
8. Click **Select**.
Civic Platform adds the PM Schedule to the batch job.

Removing a PM Schedule from an Existing Batch Job

To remove a PM Schedule from a PM Schedule batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click the link of the batch job you want to edit.
Civic Platform displays the Batch Job Details portlet.
3. Click the **PM Schedule** tab.
Civic Platform displays the PM Schedule list portlet.
4. Select the PM Schedule(s) you want to remove from the batch job.
5. Click **Delete**.

Civic Platform removes the PM Schedule from the batch job.

Adding an Asset Type to an Existing Batch Job

Add asset types to an existing batch job to broaden the number of asset records that update with GIS information when the batch job runs.

To add an asset type to an existing asset/GIS sync batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click the link of the batch job you want to edit.
Civic Platform displays the Batch Job Details portlet.
3. Click the **Asset Type** tab.
Civic Platform displays the Asset Type portlet.
4. Click **Look Up**.
Civic Platform displays the Asset Type Search portlet.
5. Complete any fields that display. For a description of the fields, see [Table 144: Batch Job Asset Type Fields](#).
6. Click **Submit**.
Civic Platform returns a list of asset types that match your search criteria.
7. Click the asset type(s) you want to add to the batch job.
8. Click **Select**.
Civic Platform adds the asset type(s) to the batch job.

Removing an Asset Type from an Existing Batch Job

To remove an asset type from an existing asset/GIS sync batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click the link of the batch job you want to edit.
Civic Platform displays the Batch Job Details portlet.
3. Click the **Asset Type** tab.
Civic Platform displays the Asset Type portlet.
4. Select the asset type(s) you want to remove from the batch job.
5. Click **Delete**.
Civic Platform removes the asset type(s) from the batch job.

Adding a Parameter to an Existing Batch Job

Add additional parameters to an existing script batch job.

To add a parameter to an existing script batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click the link of the script batch job you want to edit.

Civic Platform displays the Batch Job Details portlet.

3. Click the **Parameters** tab.

Civic Platform displays the Parameters list portlet.

4. Click **New**.

Civic Platform displays the New Parameter portlet.

5. Complete any fields that display. For a description of the fields, see [Table 145: Script Batch Job Parameters](#).

6. Click **Submit**.

Civic Platform adds the parameter to the batch job.

Removing a Parameter from an Existing Batch Job

To remove a parameter from a script batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click the link of the batch job you want to edit.

Civic Platform displays the Batch Job Details portlet.

3. Click the **Parameters** tab.

Civic Platform displays the Parameters list portlet.

4. Select the parameter(s) you want to remove from the batch job.

5. Click **Delete**.

Civic Platform removes the parameter(s) from the batch job.

Deleting Batch Jobs

You can only delete a batch job when it is not running in the process queue. You must also remove any associated PM schedules and asset types from a batch job to delete it. For instructions on removing PM schedules and asset types, see [Removing a PM Schedule from an Existing Batch Job](#) and [Removing an Asset Type from an Existing Batch Job](#). For instructions on terminating a running batch job, see [Terminating a Batch Job](#).

To delete a batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Select the batch job(s) you want to delete.

3. Ensure that the batch job is not running by checking its **Job Status** column.

Name	Job Type	E-mail	Service Category	Schedule Status	Job Status [Line Number]
DEMO_SCRP...	Script			On Hold	
Email...	URL			Active	In Process Queue
ReportDem...	Report			On Hold	Complete
Test_EMSE...	Script			On Hold	Complete
2222...	URL			On Hold	Complete
Global Se...	System		Global Search Rebuild Index	On Hold	Complete
DEMO_REPO...	Report			On Hold	Complete
Script_test...	Script	kenny.hu@...		On Hold	Complete
Test_EMSE...	Script			Active	In Process Queue
WorkflowU...	URL			Not Scheduled	

If the job is running, follow the steps outlined in [Terminating a Batch Job](#).

4. Ensure that the batch job has no PM schedules or asset types by checking the **PM Schedule** or **Asset Type** tabs.

If there are PM schedules, follow the steps outlined in [Removing a PM Schedule from an Existing Batch Job](#).

If there are asset types, follow the steps outlined in [Removing an Asset Type from an Existing Batch Job](#).

5. Click **Delete**.

Civic Platform deletes the batch job.

Searching Batch Jobs

You can locate a batch job by any of these criteria, Name, Job Type, Schedule Status, and Job Status.

To find a batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **Search**.

Civic Platform displays the Batch Job Search portlet.

The screenshot shows the 'Batch Jobs' search interface. It includes fields for 'Name' (with a placeholder 'Search...'), 'Job Type' (dropdown menu), 'E-mail' (text input), 'Description' (text area with placeholder 'check spelling'), 'Schedule Status' (dropdown menu), and 'Job Status' (dropdown menu). There are also 'Submit', 'Reset', and 'Cancel' buttons at the top.

3. Complete any of the following fields:

Name	Enter the batch job name.
Description	Enter a brief description of the batch job.
Email	Enter the email address where you want Civic Platform to send emails after job completion, no matter whether the job is successful or not. You can configure the email template NOTICE_OF_BATCH_JOB_COMPLETED to customize the notification. For information about how to edit an email notification template, see Working with Communication Manager .
Job Type	Select the job type from this drop-down menu.
Schedule Status	Select the Job Schedule Status from this drop-down menu. Job schedules can be either Active or On Hold .

Job Status	Select the batch job's status from this drop-down menu. Available values are Complete, Running, In Process Queue, and Terminated.
------------	---

4. Click **Submit**.

Civic Platform returns a list of batch jobs that match your search criteria.

Manually Executing a Batch Job

You can manually execute a batch job at any time, with no interference with the job schedule; the batch job continues to run without interruption on its regular schedule.

To manually execute a batch job

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click **Execute**.

3. The following message displays: "Execute places the selected job(s) in the processing queue." Batch job(s) continue to run as scheduled. Do you want to continue?"

Click **OK** to run the batch job.

Click **Cancel** to return to the Batch Job List portlet without running the batch job.

If you clicked OK, you place the batch job in the process queue and its Job Status reflects this. If you clicked Cancel, Civic Platform returns to the Batch Job List portlet.

Batch Jobs						
<input type="button" value="Menu"/> <input type="button" value="Search"/> <input type="button" value="New"/> <input type="button" value="Execute"/> <input type="button" value="Delete"/> <input type="button" value="Help"/>						
1 job(s) will be executed.						
<input type="button" value=" <"/> <input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value=" >"/> <input type="button" value=" >> <<"/>						
Name	Job Type	E-mail	Service Category	Schedule Status	Job Status	Start Date
<input type="checkbox"/> Planning	System		Data Manager Export	On Hold	Complete	02/14/2012
<input checked="" type="checkbox"/> Licenses	Script			Active	In Process Queue	01/01/2012
<input type="checkbox"/> stuff fro	System		Data Manager Import	On Hold	Complete	03/01/2012
<input type="checkbox"/> AAM Export	System		Data Manager Export	On Hold	Complete	
<input type="checkbox"/> Send Hear	System		Send Hearing Notice Email	On Hold	Complete	
<input type="button" value=" <"/> <input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value=" >"/> <input type="button" value=" >> <<"/>						

4. The executed batch job displays in the log along with scheduled batch jobs. To view the log, click the **Log** tab.

Civic Platform displays the Batch Job Log portlet.

Job Name: Licensing BPT						
<input type="button" value="Menu"/> <input type="button" value="Delete"/> <input type="button" value="Help"/>						
<input type="button" value="Job Detail"/> <input type="button" value="Job Schedule"/> <input type="button" value="Log (1)"/>						
<hr/>						
Log ID	Start Time	End Time	Result	Message	Record Date	
<input type="checkbox"/> 2291558	03/14/2013 00:13:08	03/14/2013 00:13:13	Completed	Job was completed.	03/14/2013 00:13:13	

Terminating a Batch Job

If for any reason you need to stop a batch job that is either in the process queue or is running, you can navigate to the batch job record, and then click Stop. This does not affect the job schedule; unless you edit the batch job schedule, the job continues to run according to that schedule. To edit the batch job schedule, see [Editing the Job Schedule and Description](#).

To stop a batch job

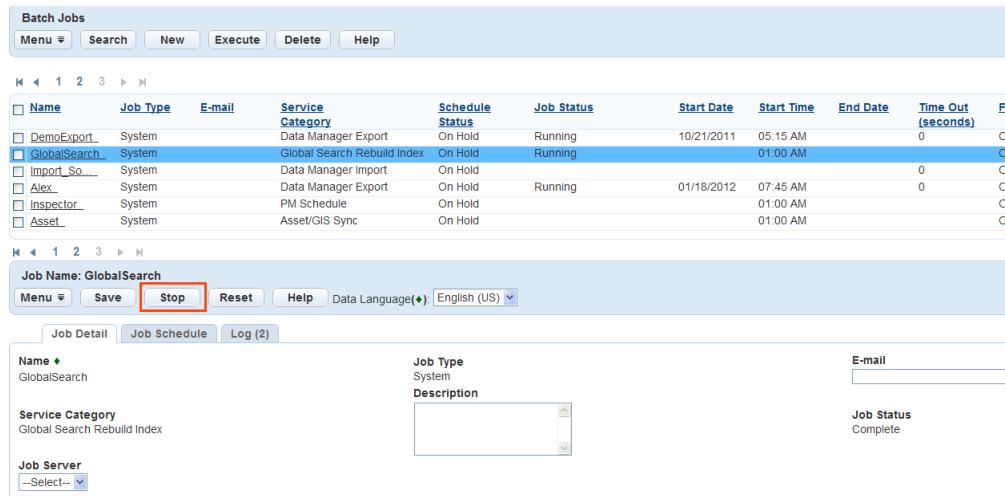
1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).

2. Click the link name of the batch job you want to stop.

You can determine whether the job is currently running by checking the Job Status column of the batch job.

Batch Jobs						
	Name	Job Type	E-mail	Service Category	Schedule Status	Job Status
<input type="checkbox"/>	PM JOB 03	System		PM Schedule	On Hold	Terminated
<input type="checkbox"/>	GlobalSearch	System		Global Search Rebuild Index	On Hold	Terminated
<input type="checkbox"/>	Test_EMSE	Script			Active	In Process Queue
<input type="checkbox"/>	PM-101	System		PM Schedule	In Process Queue	09/01/2008
<input type="checkbox"/>	ColdFusion	Script			Active	In Process Queue
<input type="checkbox"/>	Email	URL			On Hold	Complete
<input type="checkbox"/>	ReportDem	Report			On Hold	Complete
<input type="checkbox"/>	Test_EMSE	Script			On Hold	Complete
<input type="checkbox"/>	2222	URL			On Hold	Complete
<input type="checkbox"/>	DEMO_REPO	Report			On Hold	Complete
						09/17/2009

3. Click **Stop**, on the Job Detail tab.



The screenshot shows the Civic Platform's Batch Jobs portlet. At the top, there is a toolbar with buttons for Menu, Search, New, Execute, Delete, and Help. Below the toolbar is a table listing various batch jobs. One job, "GlobalSearch", is selected and highlighted with a blue background. The "Job Status" column for this job shows "Running". In the bottom right corner of the table, there is a "Job Detail" tab. On this tab, there are several fields: "Name" (GlobalSearch), "Job Type" (System), "Service Category" (Global Search Rebuild Index), "E-mail" (empty), "Description" (empty), "Job Server" (empty), and "Job Status" (Complete). Above the "Job Detail" tab, there is a "Stop" button, which is highlighted with a red box.

4. The following message displays: “Are you sure you want to stop the batch job?”

Click **OK** to stop the batch job.

Click **Cancel** to return to the Batch Job List portlet without stopping the batch job.

If you Click **OK**, the batch job is stopped. If you click Cancel, Civic Platform continues running the batch job and then displays the Batch Job List portlet.

5. The terminated batch job displays in the log. To view the log, click the **Log** tab.

The **Results** column indicates whether the batch job completed, terminated, or timed out.

Civic Platform displays the Batch Job Log portlet.

Job Name: GlobalSearch						
Menu						
<input type="button" value="Delete"/>	<input type="button" value="Help"/>					
<input type="button" value="Job Detail"/>	<input type="button" value="Job Schedule"/>	<input type="button" value="Log (3)"/>				
Log ID	Start Time	End Time	Result	Message	Record Date	
<input type="checkbox"/> 1147350	03/14/2013 00:57:48	03/14/2013 00:57:54	Terminate	Job was stopped by user.	03/14/2013 00:57:54	
<input type="checkbox"/> 1147346	03/14/2013 00:55:44	03/14/2013 00:55:50	Terminate	Job was stopped by user.	03/14/2013 00:55:50	
<input type="checkbox"/> 1147335	03/14/2013 00:54:49	03/14/2013 00:54:55	Completed	Job was completed.	03/14/2013 00:54:55	

Viewing the Batch Job Log

Each time you run a batch job on schedule, manually execute it, terminate it, or when a batch job times out, this activity displays in the batch job log.

To view the batch job log

1. Access the Batch Jobs portlet ([Accessing the Batch Jobs Portlet](#)).
2. Click the link name of the batch job whose log you want to view.
Civic Platform displays the Batch Job Detail portlet.
3. Click the **Log** tab. For a description of the information contained in this log, see [Table 146: Batch Job Log Fields](#).
Civic Platform displays the Batch Job Log portlet.

Job Name: GlobalSearch					
<input type="button" value="Menu"/> <input type="button" value="Delete"/> <input type="button" value="Help"/>					
<input type="button" value="Job Detail"/> <input type="button" value="Job Schedule"/> <input type="button" value="Log (3)"/>					
<hr/>					
Log ID	Start Time	End Time	Result	Message	Record Date
<input type="checkbox"/> 1147350	03/14/2013 00:57:48	03/14/2013 00:57:54	Terminate	Job was stopped by user.	03/14/2013 00:57:54
<input type="checkbox"/> 1147346	03/14/2013 00:55:44	03/14/2013 00:55:50	Terminate	Job was stopped by user.	03/14/2013 00:55:50
<input type="checkbox"/> 1147335	03/14/2013 00:54:49	03/14/2013 00:54:55	Completed	Job was completed.	03/14/2013 00:54:55

Table 146: Batch Job Log Fields

Log ID	Civic Platform automatically generates a sequential number to identify each log entry.
Start Time	The time at which the batch job started.
End Time	The time at which the batch job completed, you terminate it, or it times out.
Result	This column indicates whether the batch job successfully ran. The possible values in this column are: Complete: The batch job ran successfully. Terminate: The batch job was manually stopped. Time Out: The batch job's running time exceeded the Time Out setting in the Job Schedule.
Message	Message describing the batch job's result.
Record Date	The creation date for the log entry.

Importing and Exporting Settings

Click a topic title below for full details.

Related Information

[Transferring Settings](#)

[Exporting Data to CSV](#)

Transferring Settings

The Import and Export portlets are for transferring settings data, such as filters and queries.

For transferring record and configuration data, use Data Manager. Refer to the Data Manager chapter in the Accela Civic Platform Migration Guide for complete details.

Example Use Case

You create an entirely new user group and want to copy a set of data filters from an existing user group. You export the data filters, modify the XML file to add the new user group, and then import the file again.

Topics

- [Exporting Settings](#)
- [Importing Settings](#)

Exporting Settings

When you export settings data, Civic Platform creates an XML file that uses a specific file naming convention to indicate the information contained in the file, and the date and time you exported the information. If you change the file name, you must leave the export type unchanged. If you change the export type in the file name, Civic Platform cannot import the XML file.

To export settings

1. Access the Export portlet ([Accessing the Export Portlet](#)).
2. Enter the agency name you use to log in to Civic Platform.
3. Select Export from the drop-down list.
4. Click **Submit**.
5. Click **Save** and select the location where you want to save the XML file. Close the Save As dialog box. Civic Platform saves the XML file in the location you select.

Importing Settings

You can only import files that correspond to the import item type you select. For example, if you select SmartCharts as the import item type, you cannot import data filters.

To import settings

1. Access the Import portlet ([Accessing the Import Portlet](#)).
2. Select the Import Item. Browse for the Import File.

3. Click **Submit.**

Civic Platform prompts you to back up your old data.

4. Click the **Yes button to back up old data, or the **No** button to proceed without backing up.**

5. Civic Platform imports the settings.

Exporting Data to CSV

Civic Platform provides a **CSV Export** item in the menu of every list portlet or list tab. Users can select the **CSV Export** item to export the list of records on display into a CSV file.

Civic Platform also provides a **CSV Export** button beside an application-specific information (ASI) table, on the precondition that the ASI table has some data in the database. Users can click the button to export all the data stored in the database for the ASI table, not only the data on display, into a CSV file.

To control the number of records users can export to a CSV file, you must configure the Standard Choice EXPORT_MAX_RECORDS. The value you set for this Standard Choice determines the maximum number of records users can export.

Part 6: Reporting and Analytics

Civic Platform provides report functions.

Related Information

[Standard Reports](#)

[Report Manager](#)

[SmartCharts](#)

Standard Reports

Civic Platform provides a set of out-of-the-box, standard reports that users can run to extract data from your database for analysis purposes. For information on how to configure standard reports in Report Manager, see [Report Manager](#).

Standard reports are available in all modules: Service Request, Land Management, Licensing and Case Management, Asset Management, Citizen Access, and Accela common services. Accela developed these reports using state-of-the-art reporting tools such as Crystal Reports, Oracle Reports, Microsoft Reporting Services, and Accela Report Writer.

Some reports are available in multiple formats (for example, Crystal Reports and MSSQL Reports). For reports that are available in two formats, you can make both report type formats available.

Civic Platform provides access to all of these standard reports and enables you to configure user access and parameters in Report Manager. Configuring standard reports involves setting up the parameters users can specify to filter the report and provide the necessary report output. You can set up reports so that they automatically include the parameters, or you can require users to manually supply report parameter criteria.

You can generate standard reports in different output formats, such as PDF, HTML, and Excel (.xls) for tab delimited reports. For more information on output formats, refer to "Reporting" in the *Accela Civic Platform User Guide* or the documentation that came with your reporting software.

Report Manager

This section explains how reporting engines integrate with Civic Platform and provides step-by-step instructions on how to set up, organize, and configure reports so they are easily accessible to users in Civic Platform.

Note to On-premise Agencies: If your agency hosts the Civic Platform system, there are additional setup and administrative tasks you must perform to successfully use Report Manager with Crystal Reports Server, Oracle, and Microsoft Reporting Services. For complete details, refer to the Civic Platform On-premise Administrator Supplement.

Click a topic title below for full details.

Related Information

[Setting Up Report Services](#)

[Organizing Reports](#)

[Setting Up a Report](#)

[Additional Report Options](#)

Setting Up Report Services

Topics

- [Pre-Configuring Report Services](#)
- [Adding a Report Service](#)
- [Editing a Report Service](#)
- [Removing a Report Service](#)

Pre-Configuring Report Services

Before you can add report service settings to Report Manager, you must make the report service accessible from within Civic Platform and set up a reports directory to access reports in Report Manager.

- Accela-hosted and On-premise customers: contact your Accela Implementation Specialist to obtain a copy of the Civic Platform On-Premise Administrator Supplement and refer to the documentation set that came with your reporting software.
- Accela subscription customers: the professional services team performs this configuration as part of your initial setup. If you cannot find the report services you are looking for, contact your Accela Implementation Specialist.

Adding a Report Service

When the pre-configuration is complete, you can add as many report services as you need. Depending on the type of report service, required settings can change. For example, a Client Executable report does not require the location of the report directory because the report runs on the client workstation. Crystal Reports require additional security information such as agency and environment to filter reports appropriately.

Report services added to Report Manager display in the Report Service drop-down list in the Report Detail portlet shown in [Figure 45: Report Service Drop-down List](#).

The screenshot shows the 'Report Detail' portlet within an Administration interface. A dropdown menu is open under the 'Output Format' section, listing various report services. The 'MSSQL2008Report' option is highlighted in blue, indicating it is selected.

Name	Category	Process Service	Output Format
Send to Printer	--Select--	ARW	Default Format
Print Copies	1	ARW	Print Only
Save to EDMS	No	Crystal	EDMS
None	Asset Condition Assessment	Crystal2008embedded	ACCELA
No		CrystalEMBEDDED2008	
Reports 1		CrystalTestingOnly	
Reports 2		CrystalReport2008	
Reports 3		MSSQL2005	
Reports 4		MSSQL2008Report	
Reports 5		Oracle10g	
		URL_Report	
		RTF	

Figure 45: Report Service Drop-down List

The Report Output Formats selected for the report service display in Output Format drop-down list in the Report Detail portlet shown in [Figure 46: Report Format Output Drop-down List](#).

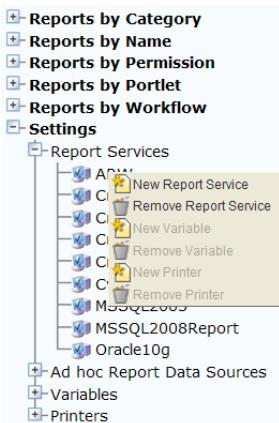
The screenshot shows the 'Report Detail' portlet within an Administration interface. A dropdown menu is open under the 'Output Format' section, listing various output formats. The 'PDF' option is highlighted in blue, indicating it is selected.

Name	Category	Process Service	Output Format
Send to Printer	--Select--	ARW	Default Format
Print Copies	1	ARW	PDF
Save to EDMS	No	Crystal	EDMS
None	Asset Condition Assessment	Crystal2008embedded	ACCELA
No		CrystalEMBEDDED2008	
Reports 1		CrystalTestingOnly	
Reports 2		CrystalReport2008	
Reports 3		MSSQL2005	
Reports 4		MSSQL2008Report	
Reports 5		Oracle10g	
		URL_Report	
		RTF	

Figure 46: Report Format Output Drop-down List

To add a report service

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Expand **Settings** in the navigation tree.
3. Right-click **Report Services** and select **New Report Service** from the menu.



Civic Platform displays the Report Service setup form.

Report Service Form

Report Service Name *

Report Service Type * ARW

Report Output Formats Adobe Acrobat (PDF)

Report Name List URL * https://aa.acecla.com9/getRptNames.jsp

Report Service URL * https://aa.accela.com8/easyReportList.do

Submit **Reset** **Help**

- Complete the fields as described in [Table 147: Report Services Field Descriptions](#). These fields vary depending on the Report Type you select.

Report Service Form

Report Service Name *

Report Service Type * Accela Ad-hoc Report

Report Output Formats

- Adobe Acrobat (PDF)
- CSV comma delimited(CSV)
- Microsoft Excel 97-2000 (EXCEL)
- Microsoft Word (RTF)
- Rich Text Format (RTF)
- XML file with report data (XML)

Report Name List URL * http://reporting.accela.com/AdHocReport/AdhocReportA

Report Service URL * http://reporting.accela.com/AdHocReport/AdhocReportA

Submit **Reset** **Help**

- Click **Submit**.

Civic Platform saves the report services settings and is available when setting up reports.

Table 147: Report Services Field Descriptions

Agency	Enter the agency code used to determine the specific reports directory folder to use when displaying reports in the Report Picker window in the Report Detail portlet. Civic Platform requires this field only for the Crystal Report type.
Authentication Method	Select the authentication method for the report service type. Basic authentication and NT authentication are applicable to Crystal Report, Oracle Report 6i, MSSQL2005 Report, and MSSQL 2008 Report. SSO authentication is applicable to Oracle Report 10g/11g.
Environment	Enter the name or ID of the environment the Crystal Report should run from. You can use the same report service for multiple environments; for example, a production environment and a training environment. Civic Platform requires this field only for the Crystal Report type.

Password	If your MS SQL Reporting Service requires Civic Platform to authenticate itself, enter the password from the user name and password account you created for the Reporting Service in IIS or through the Computer Management console.
Report Name List URL	Enter the URL to the directory where you are storing your reports. Civic Platform uses this URL to display the reports that appear in the Report Link popup window when setting up a new report. The URL should include the server name and the folder structure to locate the reports, as shown in the following example: Example Report Name List URL: http://reporting.accela.com/infospc/ReportManagement/searching/getRptName.jsp This field is not applicable for the report type Client_EXE because it launches an executable file on the user's workstation and does not access the server for the report directory location.
Report Output Format	Select each report format that is compatible with the reporting service. For report type Client_EXE the only use .doc, .rtf, or .xls formats.
Report Service Name	Enter the name used to describe the report service. For example, CRYSTAL or ORACLE. After you save the report service, this option appears in the drop-down list in the Report Detail form portlet. For an example, see Figure 45: Report Service Drop-down List .
Report Service Type	Select the type of reporting service you are using to launch reports. Options: Accela Report Writer (ARW), Client_EXE, Oracle Report, Microsoft Report, Crystal Report.  Note: Report service settings vary depending on the report type.
Report Service URL	Enter the URL location of the report service.  Note: You can only specify the server name (not IP address or domain) for the report service URL with NT authentication. Here is an example of the Report Service URL without NT authentication: <pre>http://reporting.bridgeview.com/infospc/ReportManagement/RunReport.jsp</pre> Here is an example of the Report Service URL with NT authentication: <pre>http://reporting/ReportServer\$SQL2K5</pre>
Security	Enter the security information (user name and password) necessary to access the Oracle reporting service. Civic Platform requires this field only for Oracle Report types.
User Name and Password	If your reporting service requires Civic Platform to authenticate itself, enter the authentication user name and password.

Editing a Report Service

Use caution when editing report service settings, as these settings affect your user's ability to access and run reports. For example, if the Report Service URL or Report Name URL is not valid, the user receives an error when running a report. When reporting components change, the corresponding report service setting dynamically updates. For example, if your network administrator switches the server where you are storing reports or report services, you can dynamically update the report service settings with little or no negative affect on the users.

Updates to the Report Service Name and Report Output Formats change the options that appear in the Report Detail form. For example, if you clear the check box for the Adobe Acrobat (PDF), this option is no longer available for reports using that report service.

To edit a report service

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Expand the **Settings** option in the navigation tree.
3. Expand the **Report Services** option in the navigation tree.
Civic Platform displays any existing Report Services.
4. Click the report service you want to edit.
Civic Platform displays the detail for the Report Service Form selected.

Report Service Form

Report Service Name * MSSQL2008Report
Report Service Type * MSSQL2008 Report

Report Name List URL * http://10.50.130.74/Reports_MSSQLSERVER2008/Rep
Report Service URL * http://10.50.130.74/ReportServer_MSSQLSERVER200

Environment

Agency

Authentication Method Not Required

Report Output Formats

- Adobe Acrobat (PDF)
- CSV comma delimited(CSV)
- Microsoft Excel 97-2000 (EXCEL)
- TIFF file (TIFF)
- Web archive (MHTML)
- XML file with report data (XML)
- Microsoft Word (DOC)

5. Update the fields as necessary. For more information see [Figure 54: Single Column RTF Template Source File](#).
6. Click **Submit**.

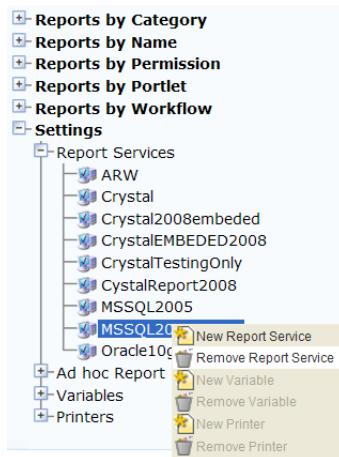
Civic Platform saves the report services settings and is available when setting up reports.

Removing a Report Service

You can remove report services that are incorrect or that you no longer need. You must also remove the reports that you reference in the report service, or update them to use a different report service, before you can remove a report service. After you remove a report service it is no longer available within Report Manager when setting up reports.

To remove a report service

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Expand the **Settings** option in the navigation tree.
3. Expand the **Report Services** option in the navigation tree.
Civic Platform displays the report services available in Report Manager.
4. Right-click the report service you want to remove and click **Remove Report Service**.
Civic Platform removes the Report Service from the Report Manager.



Organizing Reports

Topics

- [Adding a Category](#)
- [Copying Reports](#)
- [Removing a Category](#)
- [Accessing Reports by Name](#)

Adding a Category

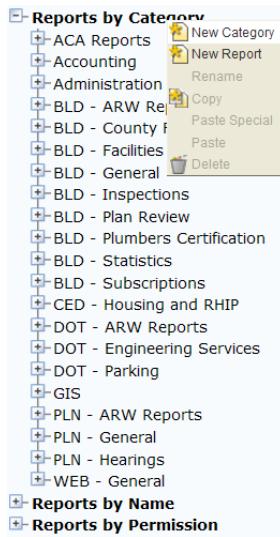
You can add custom categories to organize the reports presented to the user in the Reports Portlet. You must add categories to the report administration before defining a report and its attributes.

The categories that display for the user must contain at least one report to display in the Reports Portlet. The visibility of these categories also depends on the reports permissions. For example, if the Building category contains reports that are only accessible by the Building Inspector user group, the Building category displays only for that user group. This feature enables you to create custom categories for user groups and modules. For more information on assigning report permissions, see [Assigning Permissions to Reports](#).

The My Reports option in the Reports Portlet does not require any setup in the reports administration. This option appears for each user and does not require any setup or configuration.

To add a category

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Right-click the **Reports by Category** link in the navigation tree, and then click **New Category**.



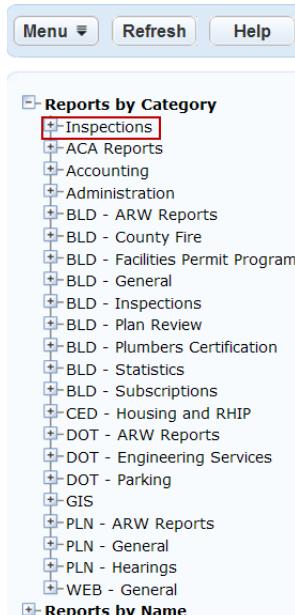
Civic Platform displays the new category page.

3. Enter the **Category** name.



4. Click **OK**.

Civic Platform creates a new category. After refresh, the reports display in alphabetical order.



5. To add a new report to the category, right-click the new category and select **New Report**. For more information on adding a report, see [Adding a Report](#).

Civic Platform displays the new report detail form portlet.

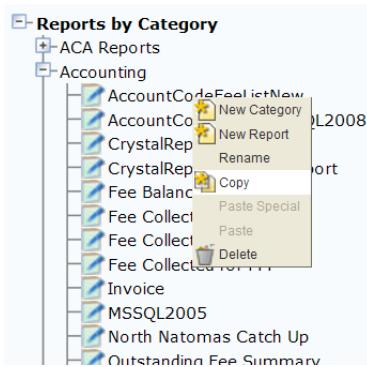
Copying Reports

You can move or copy reports from one category to another in the Reports by Category navigation tree, with the copy/paste or drag-and-drop options. The copy/paste function provides a quick way to reference a

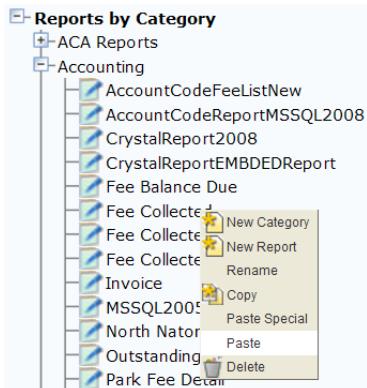
report under more than one category. For example, the Census Bureau C-404 Statistical report gets ran by more than one department. You can copy/paste the report into each department category and change the report name as appropriate for that department. The report attributes copy over along with the report, so you do not need to re-do the setup steps for each copy of the report. However, if you make changes to a report that has multiple copies, you must either apply the changes to each copy of the report or delete the report and create new copies of the updated report.

To copy a report to a category

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Navigate to the report you want to copy.
3. Right-click the report and click **Copy**.



4. Right-click the category where you want to copy the report and click **Paste** or **Paste Special**.



Civic Platform displays the Paste or Paste Special page.



5. Enter the **Report name**. If you clicked **Paste Special**, select the report attributes you want to add to the report.
6. Click **OK**.

Civic Platform copies the report to the selected category and displays it in alphabetical order.

To move a report to another category

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Navigate to the report you want to move or copy.

3. Drag the report to the target category.

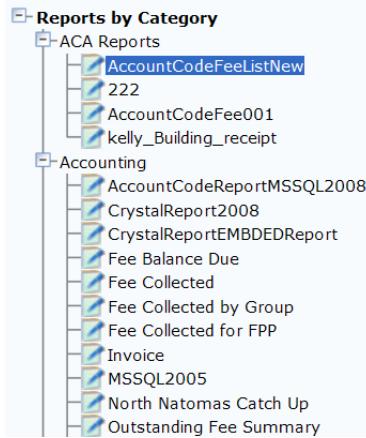
Civic Platform displays a pop-up menu with the Copy Report and Move Report options.

4. Do one of the following:

a. Click **Copy Here** to make a copy of the report and add it to the target category.

b. Click **Move Here** to move the report to the target category.

Civic Platform copies or moves the report and its attributes to the target category.

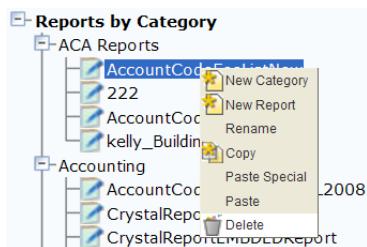


Removing a Category

Categories removed from Report Manager affect the organization and user access to the reports listed under that category. You must delete any reports assigned to the category before you can remove the category. For more information on deleting reports, see [Deleting a Report](#).

To remove a category

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Expand the category you want to remove.
3. Delete any reports under the category by right-clicking each report and clicking **Delete**.
Civic Platform deletes the selected reports.
4. Right-click the category and click **Delete**.



Civic Platform deletes the category from Report Manager.

Accessing Reports by Name

Civic Platform sorts reports added to reports administration by report name in the navigation tree. The first level of the navigation tree is from A-Z, and displays the reports according to their first letter. For example, the Permit Report displays under the letter "P." This organization option is helpful when searching for a specific report.

To access a report by name

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).

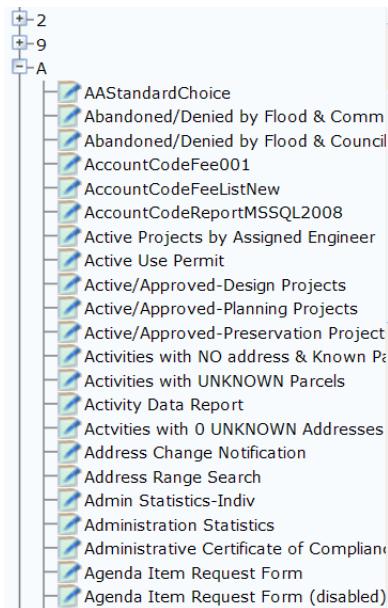
2. Expand the **Reports by Name** link in the navigation tree.

Civic Platform expands the Reports by Name category and displays a letter for the first letter of each report added to Report Manager.



3. Click the first letter of the report you are looking for.

Civic Platform displays a list of reports that starts with the selected letter.



4. Click the report you want to access.

Civic Platform displays the report detail for the selected report.

Setting Up a Report

To add reports to Report Manager each report must have the appropriate security parameters and must reside in the reports directory on the server. Reports you do not add to this directory are not accessible to Report Manager.

There are two ways for a user to run reports in Civic Platform. One is through the use of the Reports Portlet, which allows users to select a management-type report that typically analyzes data from across the database, such as a daily cash receipts report, or a monthly C-404 Statistical Report. The second way is from specific form or list portlets. These reports generally focus on a specific record or set of records such as a Permit Print or notification letter.

You can organize reports by category, so that users can easily find the reports they need in the Reports Portlet.

After adding reports to Reports Manager, you can configure additional options, such as adding parameters, assigning permissions to user groups and modules, and associating reports with workflow tasks. For more information on these configuration options, refer to the appropriate topics in this guide.

On-premise customers are responsible for setting the security parameters in each report and maintaining the reports directory. For information on how to do this, refer to the Civic Platform On-premise Administrator Supplement.

Topics

- [Adding a Report](#)
- [Editing a Report](#)
- [Renaming a Report](#)
- [Deleting a Report](#)
- [Setting up Report Parameters](#)
- [Assigning Permissions to Reports](#)
- [Attaching Reports to a Portlet](#)
- [Attaching Reports to a Workflow](#)

Adding a Report

Before you add a report to the report administration, you must add specific security parameters to the physical report. Accela-hosted and subscription customers must send each newly developed report to an Accela implementation specialist. Civic Platform adds the security parameters to the report and places it in the appropriate directory on the report server. You can access this directory from the Report Link in the Report Manager administration setup. On-premise customers, refer to the Civic Platform On-Premise Administrator Supplement for steps on setting these parameters and placing the reports in the appropriate directory.

Civic Platform organizes reports within reports administration by category. You must identify the categories before adding reports to Report Manager. These categories also display in the Reports Portlet, so that users can easily find the reports they need.

You can create and manage online inspection reports in Mobile Office the same way as they create and manage reports in Civic Platform. The Report Manager portlet provides a report category, Mobile Office Reports. If you add reports into the report category, and configure the Standard Choice ENABLE_AMO_ONLINE_REPORT, the reports are accessible on Mobile Office devices.

When adding a report to the reports administration, you must specify the report process service such as Crystal, Oracle, Microsoft Reporting, Accela Report Writer, RTF, or URL Report. This identification sends the request to execute the appropriate report engine when a user runs a report. Depending on the report service, different formatting options are available including Adobe Acrobat (.pdf), Microsoft Excel (.xls), Rich Text Format (.rtf), and many others. A preview of each report is available from the report detail form portlet. Use the preview to confirm that the correct reporting engine launches and the correct report displays before moving on to additional setup and configuration steps.

You can save reports to an Electronic Document Management System (EDMS), except for client executable reports, which you cannot save to an EDMS. With the EDMS options in the Report Detail form, you can set the report to automatically save to the EDMS and categorize the report into a document group. You can also save reports to specific objects such as Record, Parcel, Workflow, and Asset Inspection. For more information on saving reports to EDMS, see [Saving Reports to a Document Management System](#).

You can assign a report to a default printer to automatically print when a user runs the report. When a user runs a report set to automatically print, they receive a notification message when their report prints.

After you add reports to Report Manager, you can make them accessible to users in Civic Platform from the Reports portlets, other portlets, and workflow tasks. There are also additional set up and configuration steps for reports that include; adding parameters and assigning permissions to user groups and modules. These options are available in the reports administration of Report Manager. For more information on these options, refer to the appropriate topics in this guide.

To add a report

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Click **New Report** at top of the navigation tree or right-click a category or report in the navigation tree and select **New Report**.

Civic Platform displays the report detail form portlet.

The screenshot shows the 'Report Detail' form. At the top, there are buttons for 'Menu', 'Refresh', 'Help', 'Submit', 'Reset', and 'Help'. On the left, a sidebar lists categories: 'Reports by Category', 'Reports by Name', 'Reports by Permission', 'Reports by Portlet', 'Reports by Workflow', and 'Settings'. The main form area has several sections:

- Name ***: An input field.
- Category ***: A dropdown menu labeled 'Select'.
- Output Format ***: A dropdown menu labeled 'Default Format'.
- Print Only**: A dropdown menu labeled 'No'.
- EDMS Object ***: A dropdown menu labeled 'Asset Condition Assessment'.
- Process Service ***: A dropdown menu labeled 'Crystal'.
- Report Link**: An input field with a browse icon.
- Include on Report Portlet**: A section with checkboxes for 'Reports 1' through 'Reports 5'.
- Description**: A text area with a 'check spelling' link below it.
- Send in e-mail**: A checkbox with the option 'All set member Records' contacts'.
- Document Group/Category**: A dropdown menu labeled 'Select'.

3. Complete the fields described in [Table 148: Report Detail](#).

4. Click **Submit** to save the report detail.

Civic Platform saves the report detail and adds the report to the selected category in the navigation tree.

Report Name: Licenses

Submit Reset Preview Help

Report Detail Parameters Permission Portlets Workflow

Added successfully.

Name *	Category *	Output Format *
Licenses	ACA Reports	EXCEL
Send to Printer *	Print Copies	Print Only
None	1	No
Save to EDMS *	EDMS Object *	EDMS *
No	Asset Condition Assessment	ADS
Include on Report Portlet	Process Service *	Report Link *
<input type="checkbox"/> Reports 1 <input type="checkbox"/> Reports 2	Crystal	AA_Assessor_Ora.rpt
<input type="checkbox"/> Reports 3 <input type="checkbox"/> Reports 4		
<input type="checkbox"/> Reports 5		
Description	<input type="checkbox"/> Send in e-mail	Document Group/Category *
	All set member Records' contacts	Select-- Select--
check spelling		

5. Click Preview to preview the report.

Civic Platform prompts you to enter any required parameters.

report set Parameter - Windows Internet Explorer

Submit Cancel Help

Please Enter Application Number: *

13CAP-00002989

6. Enter the report parameters if required.

Civic Platform displays the report preview in another window.

Table 148: Report Detail

Authentication Method	Select the authentication method for the report service type.  Note: This field displays only when you select the URL_Report process service. With other process services, Civic Platform configures this field when you set up the related report service. See Setting Up Report Services .
Category	Select the appropriate category for the report. Civic Platform uses this category to organize and display the report for the user in the Reports Portlet or in form and list portlets. If you add a report to run in Mobile Office, Select the Mobile Office Reports .
Description	Enter a description of the report. For example, enter "The inspection list report displays the total number of inspections within a specific date range, ordered by inspection type."
Document Group/Category	Categorize the report by first selecting a value from the Document Group drop-down list, then a value from the Category drop-down list. It is important to select the Document Group first, because the Category drop-down list can be different, depending on which document group you choose.
EDMS	Select the Electronic Document Management System (EDMS) you want to save the report to. EDMS is available for all report services and types with the exception of client executables.

EDMS Object	Select the Electronic Document Management System (EDMS) object you want to save the report to. When you save the report it displays under the Documents or Attachments tab for the associated object. Options include: Record, Parcel, Workflow, Asset Condition Assessment, Inspection, Reference Contact, Reference Professional and Set. EDMS is available for all report services and types with the exception of client executables. If you select Record Contact (or Record Professional) as the EDMS Object option, you can further select one or more contact types (or licensed professional types) in the Type selection box. When users run the report in a record, Civic Platform attaches the report to the contacts (or licensed professionals) of the selected types that are associated with the record. If none of the record contacts (or licensed professionals) are of the selected types, Civic Platform does not attach the report to any record contact (or licensed professionals).
Name	Enter the name you want to display for the report in the Reports Portlet or Report Menu.
Output Format	Select the output format of the report. The options vary depending on the formats the report service supports. Options can include Adobe Acrobat (.pdf), Microsoft Word (.doc), Microsoft Excel (.xls), Rich Text Format (.rtf), and CSV comma-delimited (.csv). If you leave Output Format blank or set it to default, Civic Platform uses the default viewer for the report service. For information on updating output formats, see Setting Up Report Services .
	<p> Note: Tag reports in authorized service sales only supports “PDF” format. Mobile Office online reports do not support Default Format.</p>
Print Copies	Enter the number of copies you can print.
Print Only	Select Yes or No from this drop-down list to indicate whether you want to print the report.
Report Link	Click the Select Report Link to choose the reports available in the report directory on the server. To expand the reports list, select Expand Reports from the menu. To contract the list to display a small list of reports, select Contract Reports from the menu.
	<p> Note: Because Mobile Office users can only run an online report on an inspection, the report you choose must include one and only one parameter for getting the inspection ID. The parameter for getting the inspection ID is already hard coded for Mobile Office online reports. You need not follow the instructions in Adding Report Parameters to add the parameter.</p>
Reports Portlet 1 Reports Portlet 2 Reports Portlet 3 Reports Portlet 4 Reports Portlet 5	Select the Reports portlet where you want the report to appear. A report can appear on more than one Reports portlet. For instructions and information on where the Reports portlets appear or how to make them visible, see Designing Forms for Portlets .
Reprint Limit on Citizen Access	If you are adding a license tag report for authorized service sales in Citizen Access, you must select the maximum number of reprint requests that an authorized agent or authorized agent clerk can make. This field displays when you set the “Sent to Printer” option to Local DataMax-O’Neil E-Class Mark III Printer, and associate the report with the Print Tag button (portlet name: Button - Citizen Access Print Tag).
	<p> Note: You must configure the Standard Choice REPRINT_REASON to define a list of possible reprint reasons for the authorized agent or clerk to select.</p>

Password	<p>Enter the authentication password.</p> <p> Note: These fields display only when you select the URL_Report process service and choose the authentication method as basic authentication or NT authentication. With other process services, Civic Platform configures these fields when you set up the related report service. See Setting Up Report Services.</p>
Process Service	<p>Select the report service to use for the specified report. The options selected in the drop-down filter the reports that display in the Report Link window. The RTF and URL_Report options is always available. For details on these options, see Using RTF Templates and Using URL Reports. The other process service options are the report services you set up in Setting Up Report Services.</p> <p> Note: If you select the URL_Report process service and then set the authentication method to "Basic Authentication" or "NT Authentication," users can run a report and have it open directly without a login prompt appearing. Civic Platform passes the authentication information to the report server. However, if the report opens in a web browser, users have view-only access, and any links within the report do not function.</p>
Save to EDMS	<p>Select whether or not you want to save the report to the Electronic Document Management System (EDMS) specified in the EDMS field. Choose Yes to automatically save the report to EDMS. Choose No to not save the report automatically to EDMS.</p>
Send in Email	<p>This option is either active or inactive, based on the report format you select in the Output Format box. To activate this option, you must select any output format other than the default format.</p> <p>Select this option to enable users to send a report to record contacts. When you select this option, you must also designate a corresponding set of email recipients from the associated drop-down list. The record contacts in the drop-down list values refer to the contacts for the session application.</p> <p>Drop-down list values include:</p> <p>Attach all Record Contacts: All application contacts and licensed professionals. When you select this option and users run a report, a Send in Email button appears on the report preview page. Users click this button to select email recipients.</p> <p>Attach Primary Record Contacts: Application primary contacts and licensed professionals. When you select this option and users run a report, a Send in Email button appears on the report preview page. Users click this button to select email recipients.</p> <p>Auto-Attach all Record Contacts: All application contacts and licensed professionals. When you select this option and users run a report, Civic Platform automatically sends an email to application contacts and licensed professionals.</p> <p>Auto-Attach Primary Record Contacts: Application primary contacts and licensed professionals. When you select this option and users run a report, Civic Platform automatically sends an email to primary application contacts and licensed professionals.</p> <p>You can define email subject matter and email content under the EMAIL_REPORT SUBJECT and EMAIL_REPORT_CONTENT content customize types. This field supports multiple languages. For more information on working with the content customize form, see Customizing the Content of Agency Communications.</p> <p>To configure email reports for Citizen Access Users, contact the Accela Services Implementation Staff, who can assist in writing event logic for the following scripts: SendReportInEmail-1 and SendReportInEmail-2</p>

Send to Printer	Select the printer you want to use. Enter a default printer to automatically print the report and notify the user of its completion. To add a default printer to the list, see Setting a Default Printer .
	<p> Note: Authorized agents or authorized agent clerks print license tags for their customers in authorized service sales in Citizen Access. To enable agent to print license tags to their local printer, you must select the printer option “Local DataMax-O’Neil E-Class Mark III Printer” for the tag report. You must also associate the report with the Print Tag button (portlet name: Button - Citizen Access Tag).</p>
Template	Click Browse and select a report template in Rich Text Format (.rtf). The template can be up to 5MB. This field only applies to RTF report service type.
User Name	Enter the authentication user name.
	<p> Note: These fields display only when you select the URL_Report process service and choose the authentication method as basic authentication or NT authentication. With other process services, Civic Platform configures these fields when you set up the related report service. See Setting Up Report Services.</p>

Editing a Report

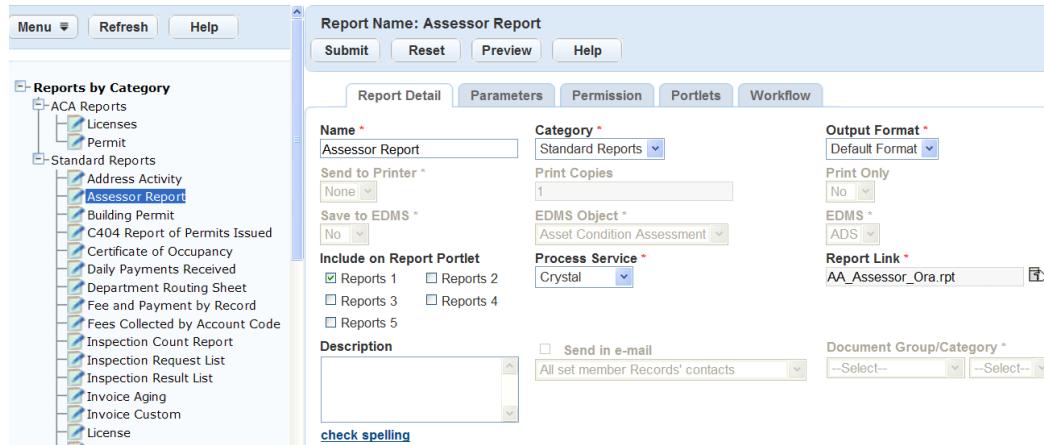
You can edit report details, but be aware that your edits can affect how the report behaves and runs. If you identify report parameters, permissions, and workflows for the report and you modify the report link, the report might not behave correctly.

The Report Name, Category, and the Show in Report Portlet options affect what the user sees. If you rename, move, or hide a report the report list that displays for the user changes accordingly.

To edit a report

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Locate the report you want to edit, using the navigation tree, and then click the report name.

Civic Platform displays the report detail form portlet.



3. Update the report details as necessary. For field definitions, see [Table 148: Report Detail](#).

4. Click **Submit**.

Civic Platform updates the report detail.

Renaming a Report

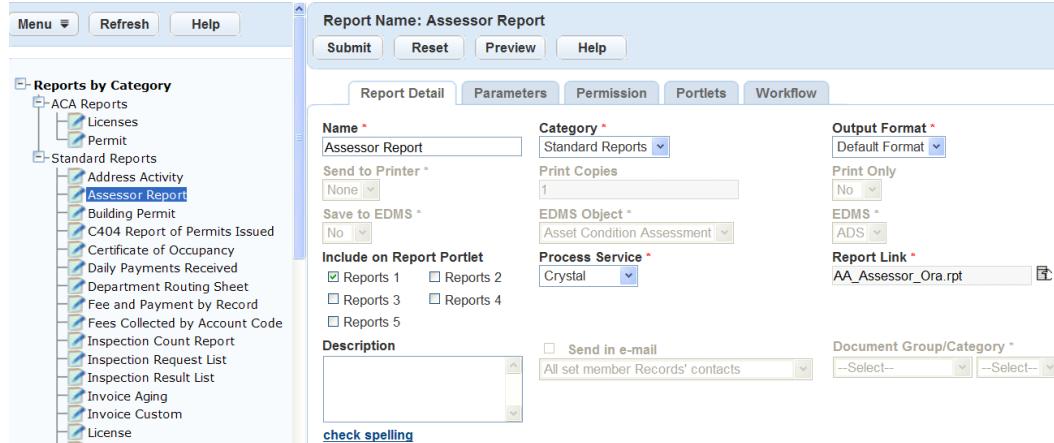
The ability to rename the report is available under any of the categories in the navigation tree. It is important to understand that renaming a report under one category, such as Reports by Name, renames the report under another, such as Reports by Category.

The name that displays in the navigation tree is also the name that displays for the users. When you rename a report in the reports administration, the report reflects the change in the Reports Portlet and in the portlet where the user accesses the report.

To rename a report

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Locate the report you want to edit, using the navigation tree, and then click the report name.

Civic Platform displays the report detail form portlet.



3. Right-click the report and click **Rename**.



Civic Platform displays the Rename Report page.

Rename Report	
Name	Assessor Report
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

4. Enter the **Report Name**.

5. Click **OK**.

Civic Platform renames the report.



Deleting a Report

When you delete a report from Report Manager, it removes the report from the report administration, and removes the reference to the report under categories in the Reports portlet and from any form or list portlet in which it appears. The report remains in the report directory on the server and accessible to Report Manager at a later date if needed. To remove a report from the reports directory on the server, contact your Accela implementation specialist or refer to the Civic Platform On-premise Administrator Supplement.

To delete a report

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Navigate and right-click the report you want to delete from the navigation tree.
3. Click **Delete** option.
Civic Platform displays a confirmation window to delete the report.
4. Click **OK** to confirm the deletion of the report.
Civic Platform deletes the report from Report Manager and any reference to the report from the user portlets.

Setting up Report Parameters

Use report parameters to assist users in filtering data for their report. You can set these parameters to prompt users to enter ranges of values that define the report's content. Civic Platform presents users with drop-down lists, date pickers, and other parameter fields where users must specify the values and ranges for the data they want to display on their report.

Figure 47: Civic Platform Parameter Prompt Window

Parameters not set up in Report Manager and required in the report display the parameter prompt window. These parameters require users to enter exact values to correctly filter the report. For example, users must enter dates in the correct format, MM/DD/YYYY or yyyy-mm-dd. The figure below shows a sample Crystal Reports parameter prompt.



Figure 48: Crystal Reports Parameter Prompt Window

Topics

- [Adding Report Parameters](#)
- [Editing Report Parameters](#)
- [Deleting Report Parameters](#)

Adding Report Parameters

Report parameters must exactly match the spelling of the parameter in the physical report. This includes parameters users must enter manually, as well as those provided by Civic Platform and automatically sent to the report. An example of an Accela provided parameter is record ID. The Building portlet supplies the record ID and automatically displays it on the report.

Use default values for parameters that generally do not change. You can also use default values to set or hard-code parameters, such as record type. The record type in a report run from a specific record portlet such as Building does not change. To hard-code a value, the parameter must not be visible in the parameter prompt window, and you must enter the value as the default value.

Set the visibility to no for any additional parameters that do not need to display in the parameter prompt window, such as an Accela-provided parameters. If the report has required parameters the user does not supply, the reporting service prompts for this value before running the report.

To add parameters for Rich Text Format (RTF) template type reports or URL reports, you must identify the variables used in the report as report parameters. For information on how to set up variable parameters for RTF templates, see [Creating RTF Templates](#), [Using Variables in Reports](#), and [Setting Up URL Reports Containing Variables](#).

To add report parameters

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Expand the category of the report you are looking for.
3. Click the report to which you want to add parameters.
Civic Platform displays the report detail form portlet.

4. Click the **Parameters tab.**

Civic Platform displays a list of parameters for the report.

Name	Type	Report Parameter Name	Display Order	Required	Visible	Default Value
agency_id	SessionVariable	serviceProviderCode	0	Yes	No	servProvCode
module	SessionVariable	cap_group	0	Yes	No	module

5. Click **New.**

Civic Platform displays the report parameter intake form portlet.

6. Complete the fields as described in [Table 149: Report Parameter Field Definitions](#).

Note that the **Type** field option, PortletVariable populates additional required fields as shown here. The **PortletVariable** populates the Portlet drop-down list so you can associate a report with a list or a form portlet. The available fields load in the Default Value field.

7. Click **Submit.**

Civic Platform saves the report parameter detail and returns to the report parameters list portlet.

Report Name: Assessor Report						
Menu		New	Delete	Help		
Report Detail		Parameters	Permission	Portlets	Workflow	
Name	Type	Report Parameter Name	Display Order	Required	Visible	Default Value
Record Number	SessionVariable	capID	0	No	Yes	altID
Invoice Number	SessionVariable	invoicenbr	0	No	Yes	invoiceID
Fee Quantity	PortletVariable	Max	0	No	Yes	Quantity(Fee List)

Table 149: Report Parameter Field Definitions

Allow Multiple Values	Select this option to enable users to select multiple values from the drop-down parameter list. This field is only available if you select the parameter type as drop-down list.
Default Value	<p>Enter or select the default value that displays in the parameter prompt window for the parameter.</p> <p>If you select the parameter type as Variable, this field is a drop-down list with all the variables defined in Adding a Variable. Note that if you select a variable with a result-set of multiple columns as the default value, the drop-down list parameter only reads the first column value from the variable.</p> <p>If you select the parameter type as PortletVariable, this field is a drop-down list that loads the available fields in the portlet you selected.</p> <p>If you select the parameter type as SessionVariable, this field is a drop-down list with the standard session variables as listed in Table 152: Report Manager Variable Parameters.</p>
Display Order	Enter the order number that the parameter should display in the parameter prompt window.
Mask	Enter the format for the parameter. For example, enter MM/DD/YYYY for a date.
Name	Enter the name of the parameter you want to display to the user in the parameter prompt window.
Report Parameter Name	Enter the name of the parameter as it appears in the report. This field value must match the exact spelling of the report parameter.
Required	Use the drop-down to specify whether the parameter optional or required. If set to Required, the user must enter the parameter before running the report.
Rows Returned	If you select a variable parameter Type, this field enables you to limit the number of rows returned for the variable parameter.
Type	<p>Select the data type of the parameter.</p> <p>To provide value options in a parameters drop-down list for users to select and send to report, select the type as Drop-down List.</p> <p>To send the record type value automatically to the report from the record portlet, select the type as RecordType.</p> <p>To link reports to a portlet and have values from the portlet passed as parameters, select the type as PortletVariable. For example, you can create a Trust Accounts detail report that links to the Trust Account list portlet or detail portlet. When users run the report, information from the selected trust account portlet acts as parameters for the report.</p>
Visible	Use the drop-down to select if the parameter should or should not display in the parameter prompt window.

Editing Report Parameters

Editing a report parameter can affect if and how the report parameter displays in the Accela parameter prompt window. For example, when you change the visibility of a parameter to NO, the parameter no longer displays. If the report has required parameters, the user receives the parameter prompt window supplied by the reporting service. The parameter prompt window also displays if you do not properly enter the Parameter Name. This type of change can be confusing to the user and requires another step before a user can run the report.

Updating report parameters for template type reports and variables requires unique values that differ from the standard report parameters used by the major report services. For information on how to set up these unique parameters, see [Using Variables in Reports](#).

To edit a report parameter

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Expand the category that contains the report.
3. Click the report you want to edit.

Civic Platform displays the report detail form portlet.

The screenshot shows the 'Report Name: Assessor Report' detail form. On the left, a sidebar lists categories like 'Reports by Category' and 'Standard Reports'. Under 'Standard Reports', 'Assessor Report' is selected. The main form has tabs for 'Report Detail', 'Parameters', 'Permission', 'Portlets', and 'Workflow'. The 'Report Detail' tab is active. It includes fields for 'Name' (Assessor Report), 'Category' (Standard Reports), 'Output Format' (Default Format), 'Send to Printer' (None), 'Print Copies' (1), 'Save to EDMS' (No), 'EDMS Object' (Asset Condition Assessment), 'Include on Report Portlet' (Reports 1 checked, Reports 2, 3, 4, 5 unchecked), 'Process Service' (Crystal), 'Report Link' (AA_Assessor_Ora.rpt), 'Description' (checkbox for 'Send in e-mail' and a dropdown for 'All set member Records' contacts), and 'Document Group/Category' (dropdowns for 'Select').

4. Click the **Parameters** portlet tab.

Civic Platform displays a list of parameters for the report.

The screenshot shows the 'Parameters' portlet for the 'Assessor Report'. It has tabs for 'Report Detail', 'Parameters' (which is active), 'Permission', 'Portlets', and 'Workflow'. A table lists parameters with columns: Name, Type, Report Parameter Name, Display Order, Required, Visible, and Default Value. The data is as follows:

Name	Type	Report Parameter Name	Display Order	Required	Visible	Default Value
agency_id	SessionVariable	serviceProviderCode	0	Yes	No	servProvCode
module	SessionVariable	cap_group	0	Yes	No	module

5. Click the **Name** of the parameter from the list.

Civic Platform displays the detail of the report parameter.

The screenshot shows the 'Report Name: Invoice' detail page. At the top are buttons for 'Submit', 'Reset', 'Cancel', and 'Help'. Below is a tab bar with 'Report Detail' (selected), 'Parameters', 'Permission', 'Portlets', and 'Workflow'. The 'Parameters' tab is active, showing fields for 'Name' (Invoice Number), 'Type' (SessionVariable), 'Report Parameter Name' (invoicenbr), 'Required' (No), 'Visible' (Yes), and 'Default Value' (InvoiceNbr). There is also a 'Display Order' field.

6. Update the fields as necessary; refer to [Table 149: Report Parameter Field Definitions](#) for field descriptions.

7. Click **Submit**.

Civic Platform saves the report parameter detail and returns to the report parameters list portlet.

Deleting Report Parameters

If you remove report parameters, including Accela provided parameters or values manually entered by a user, Civic Platform no longer sends them to the report. The parameter no longer displays in the parameter prompt window. If a report requires the parameter, Civic Platform prompts the user to enter the value in the prompt window provided by the reporting service. The parameter prompt can be confusing for users, and creates another step for the user before they can run the report.

To delete a report parameter

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Expand the category that contains the report.
3. Click the report from which to remove parameters.

Civic Platform displays the report detail form portlet.

The screenshot shows the 'Report Name: Assessor Report' detail page. On the left is a tree view of 'Reports by Category' under 'Standard Reports', with 'Assessor Report' selected. The main panel has tabs for 'Report Detail', 'Parameters' (selected), 'Permission', 'Portlets', and 'Workflow'. The 'Parameters' tab shows fields for 'Name' (Assessor Report), 'Category' (Standard Reports), 'Output Format' (Default Format), 'Send to Printer' (None), 'Print Copies' (1), 'Save to EDMS' (No), 'EDMS Object' (Asset Condition Assessment), 'Include on Report Portlet' (Reports 1 checked, Reports 2, 3, 4, 5 unchecked), 'Process Service' (Crystal), 'Report Link' (AA_Assessor_Ora.rpt), 'Description' (empty), 'Send in e-mail' (unchecked), 'Document Group/Category' (empty), and 'Check spelling' (link).

4. Click the **Parameterstab**.

Civic Platform displays a list of parameters for the report.

Report Name: Assessor Report

Menu New Delete Help

Report Detail Parameters Permission Portlets Workflow

<input type="checkbox"/> Name	Type	Report Parameter Name	Display Order	Required	Visible	Default Value
<input type="checkbox"/> agency_id	SessionVariable	serviceProviderCode	0	Yes	No	servProvCode
<input type="checkbox"/> module	SessionVariable	cap_group	0	Yes	No	module

5. Select the **Name** of the parameter you want to delete.

Report Name: Assessor Report

Menu New Delete Help

Report Detail Parameters Permission Portlets Workflow

<input type="checkbox"/> Name	Type	Report Parameter Name	Display Order	Required	Visible	Default Value
<input checked="" type="checkbox"/> agency_id	SessionVariable	serviceProviderCode	0	Yes	No	servProvCode
<input type="checkbox"/> module	SessionVariable	cap_group	0	Yes	No	module

6. Click **Delete**.

Civic Platform deletes the report parameter from the report.

Report Name: Assessor Report

Menu New Delete Help

Report Detail Parameters Permission Portlets Workflow

1 record(s) deleted successfully.

<input type="checkbox"/> Name	Type	Report Parameter Name	Display Order	Required	Visible	Default Value	Mas
<input type="checkbox"/> module	SessionVariable	cap_group	0	Yes	No	module	

Assigning Permissions to Reports

Permissions for both module and user groups apply to the Report Portlet and portlet-specific reports. Use report permissions to restrict access to a report to a specific module or user group. If an agency or department uses the Building and Service Request modules, they only see the reports that apply to those modules. User groups such as building inspectors, only see the reports that relate to inspections such as a Scheduled Inspections Report and Inspections by Inspector Listing Report.

Use report permissions to provide security for reports that contain sensitive data. For example, you can assign reports that contain sensitive data only specific management individuals should access, such as revenue based reports, to a specific user group. Only those users in that user group have access to the report.

Topics

- [Assigning a Report to a User Group](#)
- [Assigning a Report to a Module](#)
- [Assigning Permissions to Mobile Office Online Reports](#)
- [Removing Report Permissions](#)
- [Setting Permissions on Ad hoc Report Data Sources](#)
- [Removing Permissions for Ad hoc Report Data Sources](#)

Assigning a Report to a User Group

Report permissions include allowing a specific user group to access a report or a list of reports. You can also use this feature to filter reports that the user group should not see. For example, the Building module contains user groups such as field inspectors, permit technicians and property and maintenance. You assign the inspector user group only to those reports that relate to inspections, including reports that are accessible from the Reports portlet and portlet-specific reports. In order for a user group to have access to the report menu on a list or form portlet, they must have permission to at least one or more reports assigned to that portlet. If the user group does not have permission to any reports from that portlet, the report menu is not visible.

The navigation tree provides access to the list of reports assigned by module and then by user group from the Reports by User Group category. To view the user groups assigned to a specific report, navigate to the report using any of the categories in the navigation tree and, select the Permissions tab.

For more information on assigning report to a user group, see [Managing Recipients in Administration Portlets](#).

Assigning a Report to a Module

You can assign a report to one or more modules as a way to control access to the report baseline. For example, an agency that uses the Building and Service Request modules only has access to the reports assigned to those modules.

You can assign a report that users access in more than one module, such as an address label, to all modules where it is applicable. Making copies of a report to apply to each individual module causes the report to display duplicated in the Reports Portlet or from form or list portlets.

All reports within Civic Platform from the Reports Portlet or list or form portlet use the permissions set on each report to filter the reports a user has access to. In addition to modules, you must assign reports to user groups. For more information, see [Managing Recipients in Administration Portlets](#).

For more information on assigning a report to a module, see [Setting Up Security Policies](#).

Assigning Permissions to Mobile Office Online Reports

Permissions for both module and user groups to an Mobile Office Online report apply to the users who run the report in the Mobile Office client:

- When you assign an Mobile Office online report to a user group, only the Mobile Office users which belong to the same user group can access the report.
- When you assign an Mobile Office online report to a module, the report is only available for the inspections which belong to the records in the same module.

Removing Report Permissions

You can remove report permissions when a report is no longer used by a user group or module -- or if you added it by mistake. When you remove a permission, the user group or module no longer has access to the report.

The navigation tree provides access to the list of reports assigned by module and then be user group from the Reports by User Group category. To view all permissions assigned to a specific report, navigate to the report using any of the categories in the navigation tree and, select the Permissions tab.

To remove a report permission

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).

2. Expand the category and click the report.

Civic Platform displays the report detail form portlet.

3. Click the **Permissions** portlet tab.
Civic Platform displays a list of permissions for the report.
4. Select the permissions you want to remove.
5. Click **Delete**.
Civic Platform removes the permissions for the selected report.

Setting Permissions on Ad hoc Report Data Sources

Configure access to data and data sources (tables) for the Ad hoc Report portlet in Report Manager by setting permissions on a User Group and/or Module basis. When you set permissions for a data source, a user in the assigned user group (and/or with access to the assigned module) can use that data source to write reports in the Ad hoc Report portlet.

Use the standard choice ADHOC_REPORT_DB_VIEW to control which DB views (data sources) are available in the Report Manager Ad hoc Report Data Sources list. If you do not configure this standard choice, Civic Platform uses default DB Views.

For more information on setting permissions on Ad hoc report data sources, see [Managing Recipients in Administration Portlets](#).

Removing Permissions for Ad hoc Report Data Sources

You can remove access to data and data sources (tables) for the Ad hoc Report portlet by deleting permissions from the Ad hoc Data Sources Permissions list. When you delete a permission, users from the deleted group or with access to the deleted module are no longer able to use the current data source for ad hoc reporting.

To delete ad hoc reporting permissions

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Expand **Settings > Ad hoc Report Data Sources**.
A list of data sources (tables) displays.
3. Select the data source you want to delete permissions for.
The Permissions form for the selected data source displays.
4. Select each permission setting you want to delete.

Before you click **Delete**, double check your deletion choices. You do not get an opportunity to confirm the deletion after you click the button.

5. Click **Delete**.

Civic Platform removes the selected permissions for the current data source. The current data source is no longer available to users associated with the deleted module or user group for use in their ad hoc reports.

Attaching Reports to a Portlet

Users can run reports against a single record or small set of specific records. These portlet-specific reports are accessible from the reports menu located on a list or form portlet, as shown in the screen shot below. Examples of these reports include Permit Print, Certificates of Occupancy, and notifications.

Building Permits								
Menu ▾		Search	New	Create From Model	Delete	GIS	Create a Set ▾	View Log ▾
		Reports ▾	Help					
◀	1	2	3	4	5	6	7	8
▶	9	10	▶					
Record Type ▾	Status	Opened Date	Priority	Street Name	First Name	Last Name	E-mail	Dir
Alias								
<input type="checkbox"/> Building/ALM/nicole/nicole	01/07/2013							
<input type="checkbox"/> Building/ALM/nicole/nicole	Closed	02/19/2013		read-Sect...	update la...	lizz...		
<input type="checkbox"/> Building/ALM/nicole/nicole	02/17/2013			Sync to Ref	Zhang	ava@...		
<input type="checkbox"/> Building/ALM/nicole/nicole	01/29/2013			Candy	Tang			
<input type="checkbox"/> Building/ALM/nicole/nicole	01/22/2013			Candy	Tang			
<input type="checkbox"/> Building/ALM/nicole/nicole	01/19/2013							
<input type="checkbox"/> Building/ALM/nicole/nicole	01/17/2013	Smith	fds	ffdsa		N		

Figure 49: Report Button in Building Portlet

The Reports menu is accessible from any portlet within Civic Platform when you add at least one report to a portlet. The reports that display in each portlet vary depending on the user group and module permissions specified for each report. An administrator must assign user groups and modules to each report so that users can access them.

Portlet-specific reports generally use the Accela provided parameters that use a selected record or set of records to filter data in a report, which enables users to run very specific reports without having to enter parameter values. For example, a permit report generates when a user selects a specific permit from the Building portlet and runs the report. If the values required to run the report are not available, the report can return incorrect results and errors. For these types of reports, the report can be greyed-out in the report menu so that users cannot run the report. For example, to run a report on approved building permits, the permit must have a status of "Approved" in the Building portlet. If the building permit has any other status, the report is greyed-out in the report menu list, preventing the user from running the report. This feature not only prevents users from printing incorrect reports but provides a list of valid reports for the specific record.

If you use Citizen Access, you can display a print/view report button on the user interface for a specific report. Assign the record type report to a button by selecting the button name from the Portlet Name drop-down list. For more information on how to assign a report to a print/view button in Citizen Access, refer to the *Citizen Access Administrator Guide*.

Topics

- [Adding a Report to a Portlet](#)
- [Defining Criteria for a Portlet-Specific Report](#)
- [Removing a Report from a Portlet](#)

Adding a Report to a Portlet

Portlet-specific reports use a single or small set of specific records such as a building permit, notification letter, or receipt. These types of reports can be added to any of the form or list portlets within Civic Platform from a report drop-down list. The report menu only displays when you add a report to the portlet.

You can add a single report to more than one portlet and display it in the Reports Portlet. To do this you must verify that the report parameters work from the various locations.

Portlet-specific reports use the permissions set for each report, by user group and module, which means you must assign a user group and/or module to the report for it to display in the portlet. For information on assigning permissions, see [Assigning Permissions to Reports](#).

To view the list of reports for a specific portlet, expand the Reports by Portlet option in the navigation tree. To view the portlets that display on a specific report, click the report from any category on the navigation tree, and select the Portlet tab. To add criteria to a portlet-specific report, see [Defining Criteria for a Portlet-Specific Report](#).

To add a report to a portlet

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).

2. Navigate to the report you want to add to a portlet.

3. Click the report you want to add to a portlet.

Civic Platform displays the Report detail form portlet.

4. Click the **Portlets** tab.

Civic Platform displays the portlets for the report.

Portlet Name	Module	Single Window	Menu Criteria
Record List	ALL	No	Create Criteria
Fee List	ALL	No	Create Criteria

5. Click **New**.

Civic Platform displays the portlet detail form portlet.

Report Name: Outstanding Fee Summary

Submit Reset Cancel Help

Report Detail Parameters Permission Portlets Workflow

Portlet Name*

--Select--

Module*

--Select--

Display*

--Select--

Description

check spelling

6. Enter the field described in [Table 150: Report Portlets Field Definition](#).

7. Click **Submit**.

Civic Platform dynamically assigns the report to the portlet.

Table 150: Report Portlets Field Definition

Description	Enter a brief description on the report and how it should behave from the specific portlet.
Display	Select the type of display for the report.
Module	Select the module the for the portlet where you want to display the report.
Portlet Name	Select the portlet on which you want to display the report. If you use Citizen Access, select the appropriate Print/View Report button from the list. For more information on how to assign a report to a Print/View Report button in Citizen Access, refer to the <i>Citizen Access Administrator Guide</i> .

Defining Criteria for a Portlet-Specific Report

Portlet-specific reports generally use the Accela provided parameters that use a selected record or set of records to filter data in a report, which enables users to run very specific reports without having to enter parameter values. For example, a permit report generates by selecting a specific permit from the Building portlet and running the report. If the values required to run the report are not available within the selected record, the report can return incorrect results and errors. For these types of reports, the report can be disabled in the Report menu so that users cannot run it. For example, to run a report for approved building permits, the status must be "Approved" on the selected record. If the permit has any other status, the report displays inactive or "grayed-out" in the report menu list, as shown in the screen shot below. This feature prevents the user from selecting and running a report that is not applicable to the selected record or set of records.

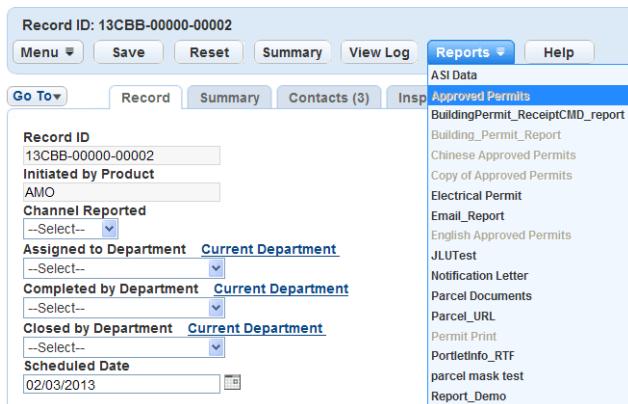


Figure 50: Unsuccessful Report

For reports associated with Civic Platform portlets, you can set criteria only for form portlets. The criteria option is not applicable to list or search portlets.

If you associate several reports with the same Citizen Access Print/View button, you must set the criteria for every report.

To set criteria for a portlet-specific report

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Navigate to and click the report to which you want to add criteria.
Civic Platform displays the Report detail form portlet.
3. Click the **Portlets** tab.
Civic Platform displays the portlets for the report.

Report Name: Outstanding Fee Summary			
New	Delete	Help	
Report Detail Parameters Permission Portlets Workflow			
<input type="checkbox"/> Portlet Name	Module	Single Window	Menu Criteria
<input type="checkbox"/> Record List	ALL	No	Create Criteria
<input type="checkbox"/> Fee List	ALL	No	Create Criteria

4. Click the **Create Criteria** or **Edit Criteria** link for the portlet to which you want to add criteria. If the desired portlet does not display, you can add it by following the steps under [Adding a Report to a Portlet](#).

Civic Platform displays the Portlet Criteria portlet.

Portlet Name: Record List

Submit Reset New Delete Cancel Help

Report Detail Parameters Permission Portlets Workflow

Criteria:					
	Prefix	Field Name	Operator	Value	Suffix
<input type="checkbox"/>	<input type="text"/>	Language	IS NOT EMPTY	<input type="text"/>	<input type="text"/> AND

5. Complete the following fields:

- Prefix Enter the prefix for the field name you want to use to set the criteria. You can also use Prefix to handle complicated criteria using brackets for the LIKE and OR expressions. See screen shot below.
- Field Name Select the portlet field for which you want to set criteria on the selected portlet. For example, to set criteria for building permits with an Approved status, select a field name of Status, and Operator of =, and a Value of Approved.
- Operator Select the appropriate operator you want to use in the criteria formula for the selected field. For example, to set criteria for building permits with an Approved status, select a field name of Status, and Operator of =, and a Value of Approved.
- Value Enter the appropriate value used to determine the criteria. For example, to set criteria for building permits with an Approved status, select a field name of Status, and Operator of =, and a Value of Approved. You can also use the wildcard % with the value. For example, to include all Permit Types that start with "Building," use the value "Building%" with the wildcard.
- Suffix Enter the suffix for the field name you want to use to set the criteria. You can use Suffix to close complicated criteria using brackets in the Prefix for LIKE and OR expressions. See screen shot below.
- AND/OR Select one of the following to join two or more criteria conditions. **AND** operator displays a row of ALL conditions listed that are true. **OR** operator displays a row of ANY of the conditions listed that are true.

Portlet Name: Set Edit Form

Submit Reset New Delete Cancel Help

Report Detail Parameters Permission Portlets Workflow

Criteria:					
	Prefix	Field Name	Operator	Value	Suffix
<input type="checkbox"/>	(Set Code	!=	<input type="text"/>	<input type="text"/> AND
<input type="checkbox"/>	((Set Name	IS NOT EMPTY	<input type="text"/>	<input type="text"/> AND
<input type="checkbox"/>)	Set Status Comments	LIKE	<input type="text"/>	<input type="text"/> OR

Figure 51: Prefixes and Suffixes in Report Criteria

6. Click **New Field** to add additional criteria to a portlet.

Civic Platform displays another line in under the previous criteria record.

Portlet Name: Record List

Submit Reset New Delete Cancel Help

Report Detail Parameters Permission Portlets Workflow

Criteria:					
	Prefix	Field Name	Operator	Value	Suffix
<input type="checkbox"/>	<input type="text"/>	Language	IS NOT EMPTY	<input type="text"/>	<input type="text"/> AND
<input type="checkbox"/>	<input type="text"/>		=	<input type="text"/>	<input type="text"/> AND

7. To delete a field, select the field and click **Delete Field**.

8. When you finish adding criteria click **Submit**.



Note: Make sure you remove all blank criteria before submitting the record. If you submit a record with blank criteria, the update fails, Civic Platform deletes the blank record, and you must submit the records again.

Civic Platform updates the criteria for the portlet.

The screenshot shows the 'Portlet Name: Record List' configuration page. At the top, there are buttons for 'Submit', 'Reset', 'New', 'Delete', 'Cancel', and 'Help'. Below these are tabs for 'Report Detail', 'Parameters', 'Permission', 'Portlets' (which is selected), and 'Workflow'. A message 'The criteria have been updated successfully.' is displayed. The 'Criteria:' table has one row: a checkbox next to 'Prefix', 'Field Name' set to 'Language', 'Operator' set to 'IS NOT EMPTY', and 'Value' and 'Suffix' fields empty. A dropdown 'AND' is set to 'AND'.

9. Click **Cancel** to return the Portlet list portlet.

Civic Platform displays the Portlet list and updates the Menu Criteria.

The screenshot shows the 'Report Name: Outstanding Fee Summary' configuration page. At the top, there are buttons for 'New', 'Delete', and 'Help'. Below these are tabs for 'Report Detail', 'Parameters', 'Permission', 'Portlets' (selected), and 'Workflow'. The 'Portlets' table lists three reports: 'Record List' and 'Fee List' under 'Module ALL' and 'Single Window No', each with a 'Create Criteria' link. The third row is for 'Portlet Name'.

Removing a Report from a Portlet

You remove reports from a portlet by removing the reference to the portlet. When you remove a report, it no longer displays in the report drop-down list.

If you are removing the only report associated with the portlet, the report drop-down list disappears. There must be at least one report assigned to the portlet in order for the report menu to be display.

To remove a report from a portlet

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).

2. Navigate to the report you want to remove from the portlet.

3. Click the report you want to remove from the portlet

Civic Platform displays the Report detail form portlet.

4. Click the **Portlets** tab.

Civic Platform displays the portlets for the report.

The screenshot shows the 'Report Name: Outstanding Fee Summary' configuration page. The 'Portlets' table now only lists 'Record List' and 'Fee List' under 'Module ALL' and 'Single Window No', each with a 'Create Criteria' link. The first row for 'Portlet Name' is empty.

5. Select the portlets you want to remove the report from.

6. Click Delete.

Civic Platform removes the report reference from the deleted portlet.

The screenshot shows a web-based application interface for managing reports. At the top, there's a header with 'Report Name: Outstanding Fee Summary' and buttons for 'New', 'Delete', and 'Help'. Below the header, there are tabs: 'Report Detail', 'Parameters', 'Permission', 'Portlets', and 'Workflow'. The 'Portlets' tab is selected. A message '1 record(s) deleted successfully.' is displayed in red. Below the message is a table with two rows. The first row has columns: 'Portlet Name' (checkbox), 'Module' (dropdown), 'Single Window' (checkbox), 'Menu Criteria' (checkbox), and 'Description' (text). The second row contains the values: 'Fee List', 'ALL', 'No', 'CreateCriteria', and an empty description field. The table has a light blue header row.

Portlet Name	Module	Single Window	Menu Criteria	Description
<input type="checkbox"/> Fee List	ALL	No	<input type="checkbox"/> CreateCriteria	

Example: Setting a Portlet for Meeting Reports

You can configure reports so that agency users can access and run reports from the Meeting Agenda portlet in the Calendar list portlet and the Meeting record tab in the Record list portlet.

You must add Meeting Reports to Report Manager before you can set the portlet display. For instructions on how to add a report, refer to [Adding a Report](#).

To set up a portlet for a meeting report

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Expand and collapse the tree nodes to find the Meeting Report you want to modify.
Civic Platform displays the Report Detail form portlet.
3. Click the **Portlets** tab.
Civic Platform displays the portlets associated with the selected report.
4. Click **New**.
Civic Platform displays the Portlet detail page.
5. If you want the selected report to display on the Meeting Agenda portlet, select List - Meeting Agenda List from the Portlet Name drop-down list. If you want the report to display on the Meetings tab in the Record list portlet, select List - Record Meeting List from the Portlet Name drop-down list.
6. Complete these remaining fields:

Description	Enter a report description. For example: "The meeting report displays the meeting date, location, and associated applications."
Display	Select a value from the drop-down list that indicates if you want the report to display in one or more windows.
Module	Select a module from the drop-down list that indicates where you want the report to display.

7. Click **Submit**.

Civic Platform updates the report detail.

Attaching Reports to a Workflow

You can associate reports with workflow tasks and configure them to automatically print when the user changes the status of a task. For example, if you want to print a building permit at the end of the application process, you can associate the building permit with the application acceptance task. Then you configure the status to execute the automatic printing of the report.

Topics

- [Adding a Report to a Workflow](#)

- [Editing a Report Association with a Workflow](#)
- [Removing a Report from a Workflow](#)

Adding a Report to a Workflow

You can configure reports to automatically print at the end of a workflow task. For example, to print a building permit at the end of the application acceptance process, select the building permit report from the report administration. Then, associate a workflow to the report by selecting the application process, acceptance task, and the complete status; this enables you to automatically run and print the building permit report when its status changes to “Complete.”

To add a report to a workflow

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Navigate to and click the report you want to add to a workflow.
Civic Platform displays the Report detail form portlet.
3. Click the **Workflow** tab.
Civic Platform displays the workflow assigned to the report.

The screenshot shows the Report Name: Outstanding Fee Summary detail page. At the top, there are buttons for New, Delete, and Help. Below them is a tab bar with Report Detail, Parameters, Permission, Portlets, and Workflow. The Workflow tab is highlighted. Underneath the tabs is a table with columns Process, Status, and Task. It contains one row for BLDG_ADDRESS with Status set to Sent and Task set to Notification.

Process	Status	Task
BLDG_ADDRESS	Notification Sent	Notification

4. Click **New**.
Civic Platform displays the report intake form by workflow portlet.

The screenshot shows the Report Name: Outstanding Fee Summary intake page. At the top, there are buttons for Submit, Cancel, and Help. Below them is a tab bar with Report Detail, Parameters, Permission, Portlets, and Workflow. The Workflow tab is highlighted. There are three dropdown menus labeled Process*, Task*, and Status*. Each dropdown has an option '--Select--'.

5. Enter information in the fields as described in [Table 151: Reports by Workflow Field Definitions](#).
6. Click **Submit**.

Civic Platform saves the report to the workflow task.

The screenshot shows the Report Name: Outstanding Fee Summary detail page again. The Workflow tab is selected. The table now includes a new row for BLDG_FIRE with Status set to Approved and Task set to Formal Review.

Process	Status	Task
BLDG_ADDRESS	Notification Sent	Notification
BLDG_FIRE	Approved	Formal Review

Table 151: Reports by Workflow Field Definitions

Process	Select the workflow process. For example, to print a building permit at the end of the application acceptance process, select Building.
---------	---

Status	Select the workflow task status that should trigger the report. For example, if you want to print a building permit at the end of the application acceptance process, you might select Complete.
Task	Select the workflow task you want to associate with the report. For example, to print a building permit at the end of the application acceptance process, select Application Acceptance.

Editing a Report Association with a Workflow

When the requirements for the automatic printing of a report from a workflow task change, you must edit the information in report administration. When you change a workflow's process, task, or status, it effects when the report automatically prints, and you must make the appropriate changes.

If the existing report is incorrect, you must remove the association between the report and workflow, select the correct report and then associate it with the workflow task. For more information, see [Removing a Report from a Workflow](#) and [Adding a Report to a Workflow](#).

To edit a report associated with a workflow

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Navigate to and click the report you want to edit the workflow.
Civic Platform displays the Report detail form portlet.
3. Click the **Workflow** tab.
Civic Platform displays the workflow assigned to the report.

Process	Status	Task
BLDG ADDRESS	Notification	Notification Sent

4. Click the link for the workflow task you want to edit.
Civic Platform displays the report by workflow detail form portlet.

Report Name: Outstanding Fee Summary

Submit Cancel Help

Report Detail Parameters Permission Portlets Workflow

Process*: BLDG ADDRESS

Task*: Notification

Status*: Notification Sent

5. Update the fields as necessary. For field definitions see [Table 151: Reports by Workflow Field Definitions](#).
6. Click **Submit**.
Civic Platform saves the changes to the association with the workflow task.

Removing a Report from a Workflow

Remove reports from workflow tasks from the report administration workflow tab or the Reports by Workflow category in the navigation tree. To remove the association from the navigation tree, search for

the report under the workflow task, right-click the report, and select Remove Association. Removing the report association stops the report from automatically printing when the workflow status updates.

To remove a report from the workflow tab

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).

2. Navigate to and click the report you want to remove a workflow.

Civic Platform displays the Report detail form portlet.

3. Click the **Workflow** tab.

Civic Platform displays the workflow assigned to the report.

Report Name: Outstanding Fee Summary		
New	Delete	Help
Report Detail Parameters Permission Portlets Workflow		
Process	Status	Task
<input type="checkbox"/> BLDG_ADDRESS	Notification Sent	Notification
<input type="checkbox"/> BLDG_FIRE	Approved	Formal Review

4. Select each workflow you want to remove.

5. Click **Submit**.

Civic Platform removes the report from the workflow and displays the report by workflow list portlet.

Report Name: Outstanding Fee Summary		
New	Delete	Help
Report Detail Parameters Permission Portlets Workflow		
Process	Status	Task
<input type="checkbox"/> BLDG_ADDRESS	Notification Sent	Notification

Additional Report Options

Topics

- [Using Variables in Reports](#)
- [Using RTF Templates](#)
- [Saving Reports to a Document Management System](#)
- [Using URL Reports](#)
- [Invoking a Client-Based Application](#)
- [Running Reports in EMSE](#)
- [Setting a Default Printer](#)
- [Using Barcodes in Payment Reports](#)

Using Variables in Reports

Variables are raw database scripts that you execute directly against the Civic Platform Oracle or MS SQL Server database, outside of a report writer or a development tool. You can incorporate these scripts into a report or report template as parameters and populate them with data from Civic Platform. For example, to extract the full name of the primary owner, use the database script displayed in [Figure 52: Report Variable Script for Primary Owner Full Name Query](#) in the report variable form.

The screenshot shows a software interface for defining a report variable. At the top left, there is a label 'Name *' followed by a text input field containing 'Primary Owner FullNam'. Below this, another label 'SQL *' is followed by a code editor window containing the following SQL query:

```
select B1_OWNER_FULL_NAME
from B3OWNERS
where SERV_PROV_CODE = 'accela' AND
REC_STATUS = 'A' AND
B1_PRIMARY_OWNER = 'Y'
```

Figure 52: Report Variable Script for Primary Owner Full Name Query

This tool provides a wide variety of reporting possibilities and is only available to super administrative users with a working knowledge of database scripts. Complicated queries that return large amounts of data effect the performance of the database and slow the responsiveness of the application. For information on how to become a super administrator, contact your Accela implementation specialist.

Report Manager includes a set of standard out-of-the-box session variables. This set of variables include frequently used parameters from Civic Platform such as Department, Module, or Service Provider Code, Today. For more information and a list of these session variables, see [Table 152: Report Manager Variable Parameters](#).

Topics

- [Adding a Variable](#)
- [Editing a Variable](#)
- [Removing a Variable](#)

Adding a Variable

You must be a super administrator user to add variables to Report Manager. If you do not have access, contact your Accela Implementation Specialist to change your permissions.

Variables are raw database scripts that you execute directly against an Oracle or MS SQL Server database outside of a report writer or a development tool. You use variables as report parameters to populate specific data in RTF template type reports developed using Microsoft Word. You can also use variables as parameters in a URL string for a URL report. For example, to extract the primary owner full name, use the database script in the report variable form. For instructions on adding this variable to an RTF template, see [Using RTF Templates](#) or [Setting Up URL Reports Containing Variables](#).

Civic Platform includes a set of frequently used runtime variables as a standard, out-of-the-box configuration. You can use runtime variables in the WHERE clause of an SQL statement. You must surround runtime variables by " \$\$ " signs and must enclose them in single quotes for Civic Platform to return the values as a string. For example, to retrieve the agency code for the logged in user, use '\$\$ServiceProviderCode\$\$'. See the screenshot below for an example of how to use the session variable within an SQL script. For a list of the standard runtime variables, see [Adding a Report Parameter Variable](#).

Report Variable Form

Submit **Reset** **Help**

Name *
ACA_SV_CAPID_ALT_Mod

SQL *

```
select 'CapID1='||$$capID1$$|
      ||'CapID2='||$$capID2$$|
      ||'CapID3='||$$capID3$$|
      ||'AltID='||$$altID$$|
      ||'Module='||$$module$$|
   from dual
```

[check spelling](#)

Figure 53: Example of Runtime Variables in SQL Statement

BEST PRACTICE RECOMMENDATION

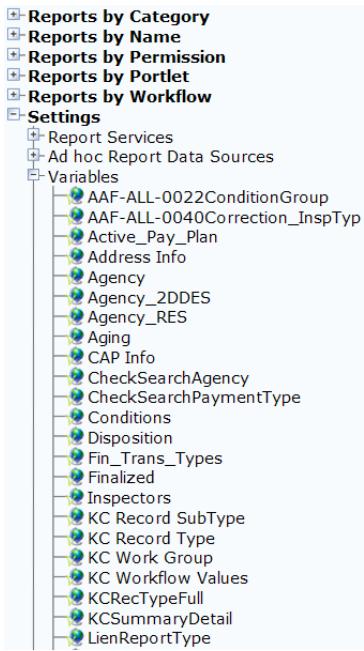
It is best practice to test your variables and your scripts in a test environment before running them against a production database or making them available to reports.

This feature provides a way to run queries and simple scripts to return small amounts of data. Do not use this tool to run complicated queries or scripts that return large amounts of data. Running these types of queries against a production database can negatively affect the database and degrade application performance, which causes portlets and lists to load slowly or become unresponsive. It is also possible to lock the database, which prevents you from saving records and causes applications to stop responding.

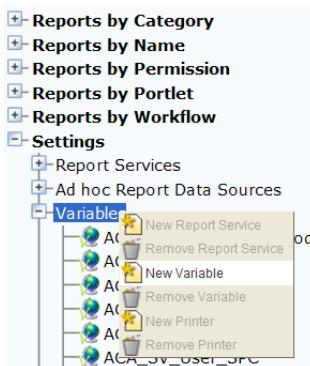
A best practice recommendation is to add security parameters to these variables. You might have users that do not have permission to view sensitive information, so it is important to write scripts that filter sensitive data according to your agency's best practices. For example, agencies that share a database must add the \$\$ServiceProviderCode\$\$ parameter to display only records created by their agency.

To add a variable

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Expand **Settings** in the navigation tree.
Civic Platform displays the Report Manager setting options.
3. Expand **Variables** in the navigation tree.
Civic Platform displays the variables available within Report Manager.



4. Right-click **Variables** and select the **New Variable** option.



Civic Platform displays the Report Variable form in the right window.

Menu	Refresh	Help
<ul style="list-style-type: none"> + Reports by Category + Reports by Name + Reports by Permission + Reports by Portlet + Reports by Workflow - Settings + Report Services + Ad hoc Report Data Sources - Variables + ACA_SV_CAPID_ALT_Mod + ACA_SV_CollectionID 		
<p>Report Variable Form</p> <p>Submit Reset Help</p> <p>Name *</p> <input type="text"/> <p>SQL *</p> <div style="border: 1px solid #ccc; height: 100px; margin-top: 5px;"></div> <p>check spelling</p>		

5. Complete the following fields:

Name Enter the name to describe the variable. For example, you might name a script that returns the primary owner first and last name, "Primary Owner Full Name."

SQL

Enter the database script into the SQL window. Make sure to test the script against the database first. When filter data, you can use standard session variables as described in [Figure 53: Example of Runtime Variables in SQL Statement](#) or hard code the value. You can specify multiple columns in the Select statement as the value of the variable.

**Note:**

If the variable populates a drop-down list parameter and its Select statement contains multiple columns, the drop-down list parameter only read the first column value from the Select statement.

6. Click Submit..

Civic Platform saves the variable.

Name *
License No

SQL *

```
SELECT B1_LICENSE_NBR
FROM b3CONTRA
WHERE SERV_PROV_CODE = '$$servProvCode$$'
AND B1_PER_ID1 = '$$capID1$$'
AND B1_PER_ID2 = '$$capID2$$'
AND B1_PER_ID3 = '$$capID3$$'
```

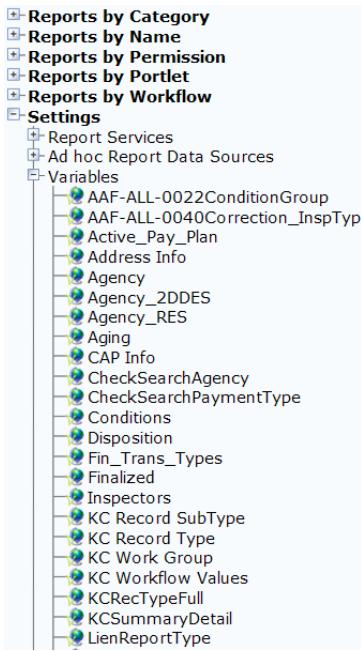
[check spelling](#)

Editing a Variable

Editing a variable might be necessary if a query fails against the database or you need to update it for any reason. Any changes to variables results reflect in the reports using the variable. It is important to keep a list of all variables used in each report and review them before making any changes.

To edit a variable

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Expand **Settings** in the navigation tree.
Civic Platform displays the Report Manager setting options.
3. Expand **Variables** in the navigation tree.
Civic Platform displays the variables available within Report Manager.



- 4.** Double-click the variable you want to edit.

Civic Platform displays the Report Variable details in the right window.

Report Variable Form

Name *
License No

SQL *

```
SELECT B1_LICENSE_NBR
FROM b3CONTRA
WHERE SERV_PROV_CODE = '$$servProvCode$$'
AND B1_PER_ID1 = '$$capID1$$'
AND B1_PER_ID2 = '$$capID2$$'
AND B1_PER_ID3 = '$$capID3$$'
```

[check spelling](#)

- 5.** Edit the applicable fields below:

Name	Update the name of the variable. For example, Primary Owner Full Name.
SQL	Update the database script in the SQL window. Make sure you test the script against the database first.

- 6.** Click **Submit..**

Civic Platform updates the variable.

Removing a Variable

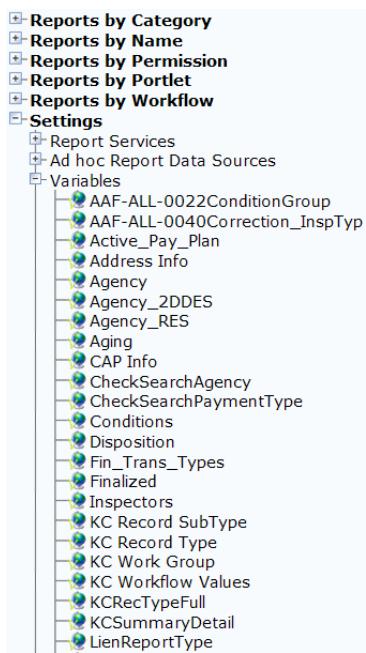
To remove a variable, you must first remove the variable from any reports that use it, specifically RTF template and URL reports. After you remove variable it is no longer available to any reports.

To remove a variable

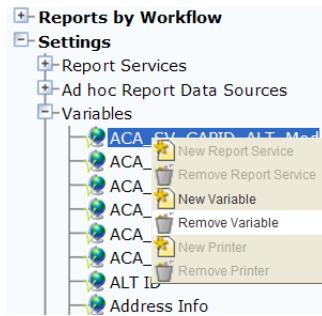
- Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
- Expand **Settings** in the navigation tree.
Civic Platform displays the Report Manager setting options.

3. Expand **Variables in the navigation tree.**

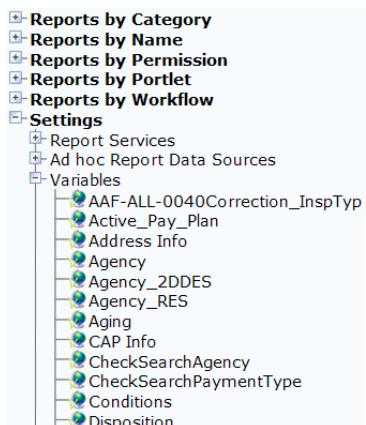
Civic Platform displays the variables available within Report Manager.



4. Right-click the variable to remove and select the **Remove Variable option.**



Civic Platform removes the variable.



Adding a Report Parameter Variable

A list of frequently used runtime variables come standard with Civic Platform; you can use them in the WHERE clause of an SQL statement. You must surround the runtime variables by “\$\$” signs and you must enclose them in single quotes for Civic Platform to return the values in a string. For example, to retrieve

the agency code for the logged in user, use '\$\$ServiceProviderCode\$\$. [Figure 53: Example of Runtime Variables in SQL Statement](#) displays how to use the session variable within an SQL script.

Table 152: Report Manager Variable Parameters below lists the supported runtime report parameter variables.

Table 152: Report Manager Variable Parameters

Variable	Name	Description
\$\$ID\$\$	ID1	Retrieves the record ID from a specific portlet. This variable works only for portlet-specific reports.
\$\$ID\$\$	ID2	Retrieves a second record ID from a specific portlet. This variable works only for portlet-specific reports.
\$\$capID1\$\$	CAPID1	Retrieves the first 5 characters of the record ID from a specific portlet. Example: CAPID = 01BLD-00000-00018
\$\$capID2\$\$	CAPID2	Retrieves the second 5 characters of the record ID from a specific portlet. Example: CAPID = 01BLD-00000-00018
\$\$capID3\$\$	CAPID3	Retrieves the last 5 characters of the record ID from a specific portlet. Example: CAPID = 01BLD-00000-00018
\$\$department\$\$	Department	Retrieves the department of the logged-in user.
\$\$gaUserID\$\$	GAUserID	Retrieves the ID of the logged-in user.
\$\$module\$\$	Module	Retrieves the module from a specific portlet. For example, if the report is available in the Building list portlet, Civic Platform sends the value "building" to the report. This variable works only for portlet-specific reports.
\$\$serviceProvCode\$\$	ServiceProviderCode	Retrieves the ID for the agency. You can use this to filter reports to include records only for the specified agency. It is a required parameter for many reports and agencies that share data.
\$\$FirstName\$\$	FirstName	Retrieves the user's first name.
\$\$MiddleName\$\$	MiddleName	Retrieves the user's middle name.
\$\$LastName\$\$	LastName	Retrieves the user's last name.
\$\$userfullname\$\$	UserFullName	Retrieves the user's full name.
\$\$userGroup\$\$	UserGroup	Retrieves the group of the logged-in user.
\$\$userID\$\$	UserID	Retrieves the ID of the logged-in user.
\$\$today\$\$	Today	Retrieves today's date. Civic Platform determines this date by the workstation's system 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.
\$\$portletID\$\$	Portlet ID	Retrieves information on a portlet, such as a field name.

Using RTF Templates

Agencies can create frequently used letters and forms that use run-time variables to populate data from the Civic Platform database. Variables can be standard session variables such as today's date and your agency name. Variables can also be custom SQL queries that extract specific data. For example, a warning letter to a citizen about specific code violations can populate with the current date and your agency name using session variables. You can use custom variables for the agency contact information, owner contact information as well as the code violation case # and description. The letter can also include an image, such as the agency's logo.

You can develop letters and forms using Microsoft Word templates that you save as Rich Text Format (RTF) files. You add these files to Report Manager; they are accessible from the Report Portlet or portlet-specific reports menus. You can also save these files to an Electronic Document Management System (EDMS). You also define the EDMS object to save the report to a record, parcel, workflow, asset condition assessment, inspection, or set. For example, you can save an approval letter to build a new structure to the building permit record. For more information and instructions, see [Saving Reports to a Document Management System](#).

The four major steps to create Rich Text Format (RTF) template based reports include:

- Create variables to embed in the report. A variable is an SQL statement that you add directly into Report Manager
- Add the variables to Civic Platform using Report Manager so they are available to the RTF report at runtime
- Create the report, including variables, using a word processor to create a template that you can save as an RTF file
- Adding the RTF report to Civic Platform using Report Manager

For information and instructions on report variables, see [Using Variables in Reports](#).

- [Creating RTF Templates](#)
- [Adding RTF Template Reports to Report Manager](#)

Creating RTF Templates

Rich Text Format (.rtf) template based reports use variables to populate data from the Civic Platform database. Variables can be standard session variables that populate generic data such as today's date, agency name, user name, and specific module. These types of variables do not require any configuration; you can use them as report parameters. For a list of session variables, see [Table 152: Report Manager Variable Parameters](#).

Variables can also be raw Microsoft SQL scripts that run against the database to extract specific information. You can add these scripts to Report Manager and use them in reports, specifically RTF template reports. For information on how to create variables, see [Using Variables in Reports](#).

An RTF report template can have multiple variables. You surround these variables by the "<\$" and "\$>" signs such as, <\$capID\$>. When the user runs a report, it replaces the defined variables with the actual value from the SQL statement. You can return variable results in different formats such as a single column and a single row, a single column and multiple rows, or multiple columns and a single row. The examples below display how you can use the different formats within an RTF template report.

Example1.rtf in [Figure 54: Single Column RTF Template Source File](#) is an example of an RTF template that uses a variable named <\$Fees\$>. At runtime, Civic Platform replaces <\$Fees\$> with the results of an SQL query that returns a single column and multiple records. For an example, see [Figure 55: Single Column RTF Template Output](#).

Dear <\$Firstname\$> <\$Lastname\$>

The following fees must be paid on your permit.

<\$Fees\$>

Figure 54: Single Column RTF Template Source File

Dear John Doe

The following fees must be paid on your permit.

Fee List
\$20.00
\$30.00
\$40.00

Figure 55: Single Column RTF Template Output

In [Figure 55: Single Column RTF Template Output](#) Civic Platform replaces <\$Fees\$> with a list of fee values returned from executing the following SQL statement:



Note:

SELECT FEE_VALUE "Fee List" FROM FEES WHERE...

Civic Platform replaces the heading for the variable <\$Fees\$> with the name of the column alias "Fee List" from the SQL query. If you do not use an alias, the column name [FEE_VALUE] displays as the column label.

Example2.rtf [Figure 56: Multiple Column RTF Template Source File](#) is an example of an RTF template that uses a variable named <\$Fees\$> which has multiple columns and multiple rows.

Dear <\$Firstname\$> <\$Lastname\$>

The following fees must be paid on your permit.

<\$Fees[0]\$> <\$Fees[1]\$> <\$Fees[2]\$>

Figure 56: Multiple Column RTF Template Source File

Dear John Doe

The following fees must be paid on your permit.

Fee Date	Fee Type	Fee Amount
01/01/2007	Application	\$20.00
01/05/2007	Permit	\$30.00
01/17/2007	Inspection	\$40.00

Figure 57: Multiple Column RTF Template Output

In [Figure 56: Multiple Column RTF Template Source File](#), Civic Platform replaces <\$Fees[0]\$>, <\$Fees[1]\$>, and <\$Fees[2]\$> with a list of fee values from executing the following SQL statement:

```
SELECT FEE_DATE "Fee Date," FEE_TYPE "Fee Type," FEE_VALUE "Fee Value"
FROM FEES
```

WHERE...

Civic Platform preserves spaces, tabs, text, or punctuation added to the template, as shown in [Figure 57: Multiple Column RTF Template Output](#), which enables you to embed variables within the text of a report. For example, the property <\$address\$> in the city of <\$city\$> has violated Ordinance No. <\$ordinanceNo \$>. The result of the report at runtime reads, “The property 111 N. 500 W. in Saint Mary’s City has violated Ordinance No. 0098791.”

Create a template based report using a word processor such as Microsoft Word. After you create a template, you must add it to Report Manager with the appropriate variables and report parameters for the report to function correctly.

To create an RTF Template

1. Do the following to create an RTF-template-based report skeleton:

- Open a new or existing Rich Text Format (RTF) file or Microsoft Word document.
- Format the template and leave place holders for the fields you want populated from Civic Platform. For example, enter brackets around the fields you want to populate. Civic Platform preserves spaces, tabs, text, punctuation, and/or images.

Dear [AA Full Name]

The following fees must be paid on your permit.

[AA Fee Date] [AA Fee Type] [AA Fee Amount]

- Save the template on your local drive.

2. Create or use existing MS SQL script variables to populate the placeholders in the RTF report. Your script might require more than one variable depending on the type of data.

For example, the RTF example requires two variables. The first populates the Owner Name [Full Name], and the second populates the following fee information: [Fee Date], [Fee Type], and [Fee Amount].

The column names in the select statement of the MS SQL script must match the order in which the variables appear in the report. For example, [Fee Date], [Fee Type], and [Fee Amount] populate in this order by entering the associated column names in the order they appear in the select statement of the SQL script as illustrated here:

Report Variable Form

Name *
Fee Information

SQL *

```
SELECT FEE_DATE "Fee Date", FEE_TYPE "Fee Type", FEE_VALUE "Fee Value"
FROM FEES
WHERE SERV_PROV_CODE = '$$servProvCode$$'
    AND B1_PER_ID1 = '$$capID1$$'
    AND B1_PER_ID2 = '$$capID2$$'
    AND B1_PER_ID3 = '$$capID3$$'
```

[check spelling](#)

For more information on creating variables, see [Adding a Variable](#).

3. Do the following to set variables in the RTF template:

- a. Open the template from your local drive.

Dear [AA Full Name]

The following fees must be paid on your permit.

[AA Fee Date] [AA Fee Type] [AA Fee Amount]

- b. Replace the placeholders with the name you want to use to identify the variable and enclose them in <\$ and \$>.

For example, if the MS SQL script variable returns fee information, use <\$Fees\$>. If the variable returns more than one value, add a number to define the order in which it displays in the SELECT statement; start with zero ("0"). The example below uses the SQL statement from Step 2.

Dear <\$Firstname\$> <\$Lastname\$>

The following fees must be paid on your permit.

<\$Fees[0]\$> <\$Fees[1]\$> <\$Fees[2]\$>

- c. Save the template in Rich Text Format (.rtf) on your local drive.

4. Do the following to add the RTF report to Report Manager:

- a. In the **Setup** portlet, click the **Report** item and choose Report Manager from the drop-down menu.

Civic Platform displays the Report Manager administration portlets.

The screenshot shows the Civic Platform Report Manager administration interface. On the left, a sidebar titled 'Setup' contains a navigation tree with items like 'Administration', 'Report', 'Report Manager', 'SmartChart Queries', 'SmartCharts', 'Structures & Establishments', 'System Tools', 'Valuation Calculator', 'Workflow & Activity', 'Work Orders', and 'Time Accounting'. Under 'Report', 'Report Manager' is selected. The main window has a title bar 'Administration' with buttons for 'Menu', 'Refresh', and 'Help'. Below the title bar is a 'Report Name:' field with 'Submit', 'Reset', and 'Help' buttons. A 'Report Detail' tab is active. The form includes fields for 'Name', 'Category' (dropdown), 'Output Format' (dropdown), 'Send to Printer' (dropdown), 'Print Copies' (text input), 'Save to EDMS' (dropdown), 'EDMS Object' (dropdown), 'Include on Report Portlet' (checkboxes for Reports 1-5), 'Process Service' (dropdown), 'Report Link' (button), 'Description' (text area), 'check spelling' (link), 'Send in e-mail' (checkbox), 'Document Group/Category' (dropdown), and 'All set member Records' contacts (dropdown).

- b. Right-click a **Reports by Category** option in the left navigation tree and select **New Report**.

Civic Platform displays a new Report detail form in the right window.

The screenshot shows the Civic Platform Administration interface. On the left, a sidebar titled "Setup" lists various administrative modules like Administration, Agency Profile, Application, Assets, Parcels, Calendars, Communication Manager, Conditions, Contact, License Certifications, Data Filter & Query, Drill Down, Inspection, Part, Report, Report Manager, Structures & Establishments, System Tools, Valuation Calculator, Workflow & Activity, Work Orders, and Time Accounting. The "Report Manager" section is expanded, showing sub-options: smartChart, smartChart Queries, smartCharts, Reports by Category, Reports by Name, Reports by Permission, Reports by Portlet, Reports by Workflow, and Settings. The main panel is titled "Administration" and contains a "Report Name:" field with "Fee" entered. Below it are tabs for Report Detail, Parameters, Permission, Portlets, and Workflow. The "Report Detail" tab is selected. Under "Report Detail", there are fields for "Name" (Fee), "Category" (Enforcement), "Process Service" (RTF), and "Output Format" (Default Format). Other settings include "Print Copies" (1), "EDMS Object" (Asset Condition Assessment), "Send to Printer" (None), "Save to EDMS" (No), "Include on Report Portlet" (Reports 1, 2, 3, 4, 5 checked), "Description" (empty), "Send in e-mail" (unchecked), and "Document Group/Category" (empty).

c. Complete the following required fields:

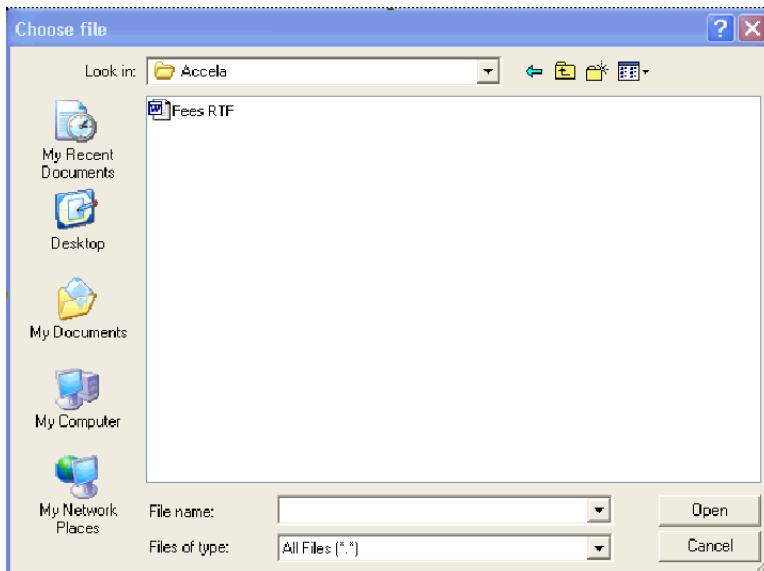
- | | |
|-----------------|---|
| Name | Enter the name of the report. The Name field is the name that appears in the Reports portlet or portlet-specific report menu. |
| Category | Select the category under which you want the report to display. |
| Process Service | Select the RTF process service. |

Civic Platform updates the Report Link to Template and displays a browse button.

This screenshot shows the same Civic Platform Administration interface as the previous one, but with a different focus. The "Report Detail" tab is selected. The "Template" field is highlighted in red, indicating it is the current step. The "Browse..." button next to it is also highlighted. The other fields shown are Name (Fee), Category (Enforcement), Process Service (RTF), and Output Format (Default Format). The rest of the fields are grayed out, indicating they have already been completed.

d. Click **Browse** to find the report on your local drive.

Civic Platform displays the Windows Explorer with the folders on your local drive.



e. Navigate to and click the report you want to add.

f. Click **Open**.

Civic Platform selects the RTF report and displays the file name for reference.

g. Complete the following required fields. For information on additional optional fields, see [Table 148: Report Detail](#).

Reports Portlet 1 - 5

Select each Reports Portlet on which you want to display the report. For information and instructions on the location of these portlets and how to add them, see [Designing Forms for Portlets](#).

Save to EDMS

Specify whether you want to save the report to EDMS. For more information, see [Saving Reports to a Document Management System](#).

h. Click **Submit**.

Civic Platform adds the report to Report Manager and displays it the report under the specified category.

i. To preview the report, click **Preview**. This preview does not populate the variables but confirms you have the correct template.

Civic Platform displays a preview of the report.

5. Do the following to link variable parameters to the RTF report:

- a. Click the **Parameters** tab.

Civic Platform displays the Parameters list portlet.

- b. Click **New**.

Civic Platform displays the Parameters detail portlet.

Name *	Type *	Report Parameter Name *
Fee Information	Variable	Fees
Required *	No	Default Value
Display Order	Visible	Mask

- c. Complete the following required fields. For the additional optional fields and their descriptions, see [Table 149: Report Parameter Field Definitions](#).

Name	Enter the name of the parameter. For example, to add a variable parameter that returns fee information, use "Fees."
Type	Select the Variable parameter type.
Report Parameter Name	Enter the name of the variable. Use this name in the RTF template to specify the location where you want to return and populate the variable values on your report. For example, the template displayed in uses the "Fees" variable. This name must match the exact spelling used in the RTF template.
Visible	Select NO to send the parameters directly to the database and automatically populate the RTF report without prompting the user.
Default Value	Select the SQL script variable, that returns the values for the RTF report. For example, use "Fees" to populate the fee information.
Display Order	Enter the display order for the variable as it displays in the RTF template. The display order defines the order in which Civic Platform runs the SQL script variables and then returns values.

Name *	Type *	Report Parameter Name *
Fee Information	Variable	Fees
Required *	No	Default Value
Display Order	Visible	Rows Returned
2	No	

Figure 58: RTF Report Parameter Detail

- d. Click **Submit**.

Civic Platform creates the variable parameter and then displays it in the Parameters list portlet.

Name	Type	Report Parameter Name	Display Order	Required	Visible	Default Value	Mask
Permit Number	SessionVariable	PermitNumber	0	No	Yes	altID	
Fee Information	Variable	Fees	0	No	No	Fees	

Adding RTF Template Reports to Report Manager

After you create your RTF template report and save it to your local drive, you can add it to Report Manager. To add an RTF report you must first define the RTF report service. See [Setting Up Report Services](#) for complete instructions on adding an RTF report service.

If your RTF template contains variables, you must define those variables as report parameters. For example, if the template contains the variable <\$Fees\$>, you must identify and define a parameter for Fees. The name of the parameter must match the exact spelling of the variable in the RTF report. If your report contains more than one variable value, you can specify the order in which you want the values to display on the report by defining the display order in the variables; start with 0 (zero). Refer to the following sample screen which illustrates Fee Date, Fee Type, and Fee Value, along with their respective sort order definitions [0], [1], and [2]:

Dear [AA Full Name]

The following fees must be paid on your permit.

[AA Fee Date] [AA Fee Type] [AA Fee Amount]

You can save RTF template reports to an Electronic Document Management System (EDMS) allowing the user to save a snapshot of data for historical purposes. You can also save RTF template reports as specific EDMS object types such as records, parcels, workflow, asset condition assessment, inspections and sets. Templates save automatically at runtime. For more information on saving to EDMS, see [Saving Reports to a Document Management System](#).

You can save RTF reports in multiple formats, including Microsoft Word and Adobe Acrobat (PDF). The available output options are native to the report service. After you save an RTF report a Preview button becomes enabled so you can preview the report prior to printing. To update the RTF report, you must make the changes on your local drive and upload the updated template by clicking the Browse button in the Report Detail portlet.

The steps below provide instruction on how to add an existing RTF report for which you previously defined the variables. For instructions on creating a new RTF template report, see [Creating RTF Templates](#).

To add RTF template based reports

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Right-click the **Reports by Category** option in the left navigation tree and select **New Report**. Civic Platform displays a new report detail form in the right window.
3. Complete the following fields. For additional field definitions, see [Table 148: Report Detail](#).

Name	Enter the name of the report. The Name field is the name that appears in the report portlet or portlet-specific report menu.
Category	Select the category under which you want to display the report.
Report Service	Select the RTF report service. If the RTF report service is not available, you must set it up. For instructions, see Setting Up Report Services .

Civic Platform updates the Report Link to Template and displays a browse button.

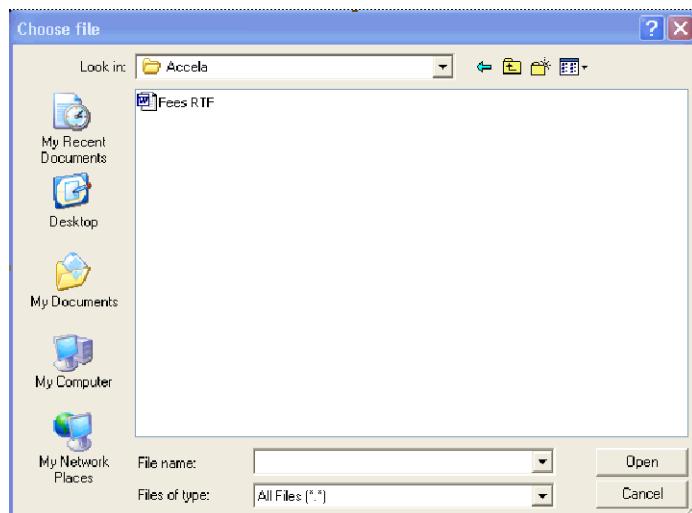
Report Name:

Report Detail Parameters Permission Portlets Workflow

Name * <input type="text" value="Fee"/>	Category * <input type="button" value="Enforcement"/>	Output Format * <input type="button" value="Default Format"/>
Send to Printer * <input type="button" value="None"/>	Print Copies <input type="text" value="1"/>	Print Only <input type="button" value="No"/>
Save to EDMS * <input type="button" value="No"/>	EDMS Object * <input type="button" value="Asset Condition Assessment"/>	EDMS * <input type="button" value="ACCEL A"/>
Include on Report Portlet <input type="checkbox"/> Reports 1 <input type="checkbox"/> Reports 2 <input type="checkbox"/> Reports 3 <input type="checkbox"/> Reports 4 <input type="checkbox"/> Reports 5	Process Service * <input type="button" value="RTF"/>	Template Up to 5M * <input type="button" value="Up to 5M"/> <input type="button" value="Browse..."/>
Description <input type="text"/>	Send in e-mail <input type="checkbox"/> All set member Records' contacts	Document Group/Category * <input type="button" value="--Select--"/> <input type="button" value="--Select--"/>

4. Click **Browse to find the template report.**

Civic Platform displays the Windows Explorer with the folders on your local drive.



5. Navigate to and click the report you want to add.

6. Click **Open.**

Civic Platform selects the RTF report and displays the file name for reference.

Report Name:

Report Detail Parameters Permission Portlets Workflow

Name * <input type="text" value="Fee"/>	Category * <input type="button" value="Enforcement"/>	Output Format * <input type="button" value="Default Format"/>
Send to Printer * <input type="button" value="None"/>	Print Copies <input type="text" value="1"/>	Print Only <input type="button" value="No"/>
Save to EDMS * <input type="button" value="No"/>	EDMS Object * <input type="button" value="Asset Condition Assessment"/>	EDMS * <input type="button" value="ACCEL A"/>
Include on Report Portlet <input type="checkbox"/> Reports 1 <input type="checkbox"/> Reports 2 <input type="checkbox"/> Reports 3 <input type="checkbox"/> Reports 4 <input type="checkbox"/> Reports 5	Process Service * <input type="button" value="RTF"/>	Template Up to 5M * <input type="button" value="Up to 5M"/> <input type="text" value="D:\Documents and Settings\"/> <input type="button" value="Browse..."/>
Description <input type="text"/>	Send in e-mail <input type="checkbox"/> All set member Records' contacts	Document Group/Category * <input type="button" value="--Select--"/> <input type="button" value="--Select--"/>

7. Complete the following fields. For additional field descriptions, see [Table 148: Report Detail](#).

Reports Portlet 1 - 5

Select each Reports Portlet where you want to display the report. For information and instructions on the location of these portlets and how to add them, see [Designing Forms for Portlets](#).

Save to EDMS

Specify whether you want to save the report to EDMS. For more information, see [Saving Reports to a Document Management System](#).

8. Click Submit..

Civic Platform adds the report under the specified category.

9. To preview the report before saving, click Preview.

Civic Platform displays report preview.

10. Do the following to link the variables in the RTF template:**a. Click the Parameters tab.**

Civic Platform displays the parameters list portlet.

b. Click New.

Civic Platform displays the parameter detail portlet.

Name *	Type *	Report Parameter Name *
<input type="text"/>	<input type="button" value="Select"/>	<input type="text"/>
<input type="button" value="Select"/>	<input type="button" value="Select"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	

c. Complete the following fields. For field description on additional fields, see [Table 149: Report Parameter Field Definitions](#).

Name Enter the name of the parameter. Example, date, status, fees, address info etc.

Type Select the **Variable** parameter type.

Report Parameter Name Enter the name of the variable. Use this name in the RTF template to specify the location where you want to return and populate the variable values on your report. For example, the report parameter name for the RTF template in [Figure 56: Multiple Column RTF Template Source File](#) is 'Fees'.

Visible Select **NO** to send the parameters directly to the database and automatically populate the RTF report without prompting the user.

Default Value Select the variable (sql script), that returns the values for the RTF report.

Display Order Enter the display order for the variable as it displays in the RTF template. The display order defines the order in which the variable values display on your report.

d. Click Submit..

Civic Platform creates the variable parameter and then displays in the parameters list portlet.

Name	Type	Report Parameter Name	Display Order	Required	Visible	Default Value	Mask
Permit Number	SessionVariable	PermitNumber	0	No	Yes	altID	
Fee Information	Variable	Fees	0	No	No	Fees	

11. To add the RTF template report to run from a specific portlet, such as the Building portlet, click the **Portlets** tab. For more information on adding reports to portlets, see [Attaching Reports to a Portlet](#).

Saving Reports to a Document Management System

You can automatically save and categorize a report into a document type in an Electronic Document Management System (EDMS). Saving reports to EDMS allows users to save a snapshot of data at any given time. You save the template fields of the reports into the EDMS as part of the document information (metadata) during report generation. Civic Platform synchronizes the template fields with the metadata in the EDMS if you satisfy the following requirements:

- You must properly configure the standard choice EDMS; set the EDMS vendor to STANDARD and append the string “VERSION=7.2.0” to the end of the value description.
- You must define a set of Custom Fields (document template fields or metadata) for the document type you categorize the report into.
- The document template fields are mapped to session variables and SQL variables. For more information about mapping document template fields to variables, see [Creating Custom Fields](#).

You can save reports and templates to any of the following EDMS object: Record, Parcel, Workflow, Asset Condition Assessment, Inspection and Set. For example, to allow a user to save the C-403 report run monthly, you can configure the report to save to EDMS and to the record, while also categorizing it to the PDF category for the RepAttach group.

You can save reports to multiple Electronic Document Management Systems. For example, you might want to save building permit reports to Civic Platform’s EDMS, and save the C-404 Statistical Reports to your agency’s EDMS on your company Intranet. You can add additional Electronic Document Management Systems by setting the appropriate Standard Choices. For instructions on adding new EDMS options, refer to the “Standard Choices Reference” section of the Civic Platform Configuration Reference.

Saving reports to EDMS is available for all report types and all services with the exception of the client-side executables.

To set a report to save to EDMS

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Use the navigation tree to find and click the report you want to save to EDMS.

The screenshot shows the Report Manager portlet interface. At the top, there are buttons for Submit, Reset, Preview, and Help. Below these are tabs for Report Detail, Parameters, Permission, Portlets, and Workflow. The Report Detail tab is active. On the left, there are fields for Name (Address Range Search), Send to Printer (None), and Save to EDMS (Yes). Under Save to EDMS, there are dropdown menus for Category (BLD - General), EDMS Object (Asset Condition Assessment), Process Service (Crystal), and Output Format (PDF). There is also a Print Copies field (1) and a Print Only checkbox (No). On the right, there is a Report Link field containing "BLD_address_range_08192009". At the bottom, there is a Description area with a check spelling link, a Send in e-mail checkbox (unchecked), and a Document Group/Category field with two dropdown menus (both labeled "--Select--").

3. Complete following fields:

Save to EDMS	Choose Yes or No so specify whether or not to save to EDMS. If you choose Yes, Civic Platform activates the Document Group/Category drop-down lists.
Document Group/ Category	Use the drop-down lists to select the document group and document category to categorize the report. It is important to select the Document Group first because the Category drop-down list loads based on which document group you choose.
EDMS Object	Select the EDMS object type. Your options are: Record, Parcel, Workflow, Asset Condition Assessment, Inspection and Set.
EDMS	Select the Electronic Document Management System to which you wan to save the report.

4. To test the report, click **Preview.**

Civic Platform runs the report and displays the report.

5. Click **OK to save to EDMS.**

Civic Platform saves the EDMS

6. Click **Submit..**

Civic Platform saves your EDMS report settings.

Using URL Reports

You can define a URL as a report source that a Civic Platform user can launch. For example, you can set up a Permit Print report that users can run from an agency, from a government website, or from a report server.

The URL feature can also launch a web page. For example, a clerk from the Health Planning and Development confirms that a licensed professional architect's license is valid according to the CSLB, Consumer Affairs, Professional Engineers Board, and the Architects Board. A link to these websites and or databases through a URL allows the user to access the information.

In addition, the agency's website or its document management system can also be helpful to the user. These URL links and the URL reports are available from the reports portlet and specific portlet report menu.

Topics

- [Setting up URL Reports](#)
- [Setting up URL Links](#)
- [Setting Up URL Reports Containing Variables](#)

Setting up URL Reports

You can define a URL string as a report source that a Civic Platform user can launch. For example, a user can run a Permit Print report from an agency website, a government website, or a report server. You configure this by appending the report URL with the parameters you want to pass. Civic Platform then passes the parameters from the URL to the report server when a user clicks a link on a website.

The Permit Print report requires specific parameters to differentiate between the URL Permit Print and the Civic Platform Permit Print report.

To set up a URL report

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Right-click **Reports by Category** from the navigation tree and select **New Report** from the menu. Civic Platform displays a new report detail form in the right window.

The screenshot shows the 'Report Name: Parcel Documents' configuration screen. The 'Report Detail' tab is active. Key fields include:

- Name:** Parcel Documents
- Category:** Standard Reports
- Print Copies:** 1
- EDMS Object:** Asset Condition Assessment
- Process Service:** URL_Report
- Report Link:** http://www.onbase.com (highlighted by a red arrow)
- Description:** (empty)
- Send in e-mail:** (unchecked)
- Document Group/Category:** (Select...)
- Authentication Method:** Not Required

3. Complete the following required fields. For a list of field definitions, see [Table 148: Report Detail](#).

- | | |
|----------------|---|
| Name | Enter the name of the report. The name you enter displays in the Report Portlet or portlet-specific report menu. If this is a Permit Print report, enter Permit Print . |
| Category | Select the category the report belongs to. |
| Report Service | Use the drop-down to select the URL_Report report service. |
| Report Link | Enter the URL to the report source. For example, enter http://permit.accela.com . To pass static parameters, include them in the URL address. For example, enter http://permit.accela.com/PERMITID07BBP-00000-0010 . To pass Accela-provided parameters, you must add parameters in the Parameters portlet. You might also need to accommodate the end of the URL to accept the parameter with /index.jsp so that the parameter value matches the following example: http://permit.accela.com/index.jsp/permitID=07BBP-00000-0010 . For instructions on adding parameters, see Setting up Report Parameters . |



Note:

You must specify the server name (not IP address or domain) in the report link URL if you want to apply NT authentication for the report. Here is an example of the report link with NT authentication: [http://reporting/ReportServer\\$SQL2K5](http://reporting/ReportServer$SQL2K5).

4. Click Submit..

Civic Platform saves the URL report.

5. To add parameters to the report click the **Parameters** tab. For instructions, see [Setting up Report Parameters](#) or [Setting Up URL Reports Containing Variables](#).

Setting up URL Links

The URL feature can also launch a web page. For example, a clerk from the Health Planning and Development confirms that a licensed professional architect's license is valid according to the CSLB, Consumer Affairs, Professional Engineers Board, and the Architects Board. A link to these websites and or databases through a URL allows the user to access the information. Linking to your agency website or your document management system can also be helpful to the user. Adding URL links to the support page provides easy access to user forums and technical assistance.

To set up a URL link from the reports portlet

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).

2. Right-click the **Reports by Category** from the navigation tree and select **New Report** from the menu.

Civic Platform displays a new report detail form in the right window.

The screenshot shows the 'Report Detail' tab selected in the top navigation bar. The form contains the following fields:

- Name:** Parcel Documents
- Category:** Standard Reports
- Print Copies:** 1
- EDMS Object:** Asset Condition Assessment
- Output Format:** Default Format
- Save to EDMS:** No
- Process Service:** URL_Report
- Report Link:** http://www.onbase.com (highlighted with a red arrow)
- Include on Report Portlet:** Reports 1, Reports 2, URL_Report
- Description:** (empty text area)
- Send in e-mail:** All set member Records' contacts
- Document Group/Category:** (two dropdown menus, both set to 'Select')
- Authentication Method:** Not Required

3. Complete the following required fields. For a list of field definitions, see [Table 148: Report Detail](#).

Name	Enter the name of the URL link. The name you enter displays in the Report Portlet or portlet-specific report menu. For example, enter "Support."
Category	Select the category the report belongs to. For example, enter "Company Information."
Report Service	Use the drop-down to select the URL_Report report service.
Report Link	Enter the URL to the website or service. For example, enter "http://www.accela.com/support/support_overview.asp"

4. Click **Submit..**

Civic Platform saves the URL link.

Setting Up URL Reports Containing Variables

Variables are raw database scripts Civic Platform executes directly against the Civic Platform Oracle or MS SQL Server database outside of a report writer or development tool. You can use these scripts to pass parameters to a URL report, like variables in an RTF report. Before you can run a report, you must set up the variables and a URL report service in Report Manager. For information on how to set up a variable, see [Using Variables in Reports](#). For information on how to set up a report service, see [Setting Up Report Services](#).

A super administrator can add variables to Report Manager and specify them as accessible to users along with Civic Platform session variables. You can then define the number rows you want to return from these variables to your report by adding them to the end of the report URL.

The following example demonstrates how to set-up and run a URL report using a variable and limiting the number of rows returned.

A Civic Platform administrator develops a report to open the EDMS for up to 5 parcel numbers for specific record selected from Civic Platform.

How to set up a URL report containing and limiting the return of variables

- Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
- In the navigation tree, expand the **Settings** node and click **Variables** to create a variable within Report Manager using super agency user rights.

For example, the variable in the graphic below specifies the return of all parcel numbers for a record.

Report Variable Form

Submit **Reset** **Help**

Name *
Parcel

SQL *

```
SELECT B1_PARCEL_NBR
FROM B3PARCEL
WHERE SERV_PROV_CODE = '$$servProvCode$$'
AND B1_PER_ID1 = '$$capId1$$'
AND B1_PER_ID2 = '$$capId2$$'
AND B1_PER_ID3 = '$$capId3$$'
```

[check spelling](#)

3. Add a Variable.

- Right-click the **Variables** option in the navigation tree and then click **New Variable** OR Click **Menu** and choose **New Variable**.

- Type in **Name** of the Variable

- Enter the SQL script with the Standard Session Variables. Example, '\$\$capId1\$\$\$'
If you need more information about Variables, see [Adding a Variable](#).

4. Click **Menu and choose **New Report** from the drop-down list.**

5. Complete the following required fields. For a list of field definitions, see [Table 148: Report Detail](#).

Name	Enter the name of the report. The name you enter displays in the Report Portlet or portlet-specific report menu. If this is a Permit Print report, enter Permit Print .
Category	Select the category the report belongs to.
Report Service	Use the drop-down to select the URL_Report report service.
Report Link	Enter the URL to the report source. For example, enter http://permit.accela.com . To pass static parameters, include them in the URL address. For example, enter http://permit.accela.com/PERMITID07BBP-00000-0010 .

To pass Accela-provided parameters, you must add parameters in the Parameters portlet.

Report Name: Parcel Documents

Submit **Reset** **Preview** **Help**

Report Detail **Parameters** **Permission** **Portlets** **Workflow**

Name * Parcel Documents	Category * Standard Reports	Output Format * Default Format
Send to Printer * None	Print Copies 1	Print Only No
Save to EDMS * No	EDMS Object * Asset Condition Assessment	EDMS * ADS
Include on Report Portlet <input checked="" type="checkbox"/> Reports 1 <input checked="" type="checkbox"/> Reports 2 <input type="checkbox"/> Reports 3 <input type="checkbox"/> Reports 4 <input type="checkbox"/> Reports 5	Process Service * URL_Report	Report Link * http://www.onbase.com
Description check spelling	Send in e-mail All set member Records' contacts	Document Group/Category --Select--
Authentication Method Not Required		

6. Click **Submit.**

7. Add variable information:

- Click the **Parameter** tab.

- b. Click **New** to add a new variable. For a list of session variables, see [Table 152: Report Manager Variable Parameters](#).
- c. Complete the fields as described in [Table 149: Report Parameter Field Definitions](#).
For this example, the parameter is a variable type that returns 5 rows.

Report Name: Parcel

Submit Reset Cancel Help

Report Detail Parameters Permission Portlets Workflow

Name *	Type *	Report Parameter Name *
Parcel	Variable	Parcel
Required *	Visible *	Default Value
No	No	Parcel Info
Display Order		Rows Returned
1		5

- d. Click **Submit..**

- 8. Assign permissions to the appropriate modules or users to access the URL report. For information on how to assign permissions, see [Assigning Permissions to Reports](#).

The following example shows the URL report assigned to the Licenses Module.

Module - Tree View

Module

- Building
- Planning
- PublicWorks
- AMS
- Licenses**
- ServiceRequest

Submit Cancel Help

- 9. Add the URL report to the appropriate portlet. For information on how to add a report to a portlet, see [Adding a Report to a Portlet](#).

The following example shows the URL report assigned to the Record Detail Form.

Report Name: Parcel Documents

Submit Reset Cancel Help

Report Detail Parameters Permission Portlets Workflow

Portlet Name*	Record Detail Form
Module*	Building
Display*	Single Window
Description	

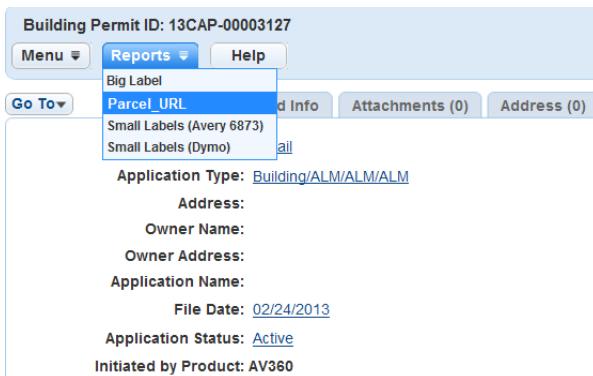
[check spelling](#)

10. Run the report

- a. Navigate to the portlet to which you want to run the report.

For this example, **Building** > select a permit in the **Record** portlet.

Open a permit record, click the Reports menu, and choose the report from the drop-down list.



Civic Platform opens a new window to display the URL report.

Invoking a Client-Based Application

You can launch client-side executables (Microsoft Word and Microsoft Excel) from a report menu. This enables users to launch reports that reside on their local machine from within Civic Platform, and populate those reports with data from Civic Platform. Use this feature to invoke any type of client-side executable, such as Crystal Reports, a custom application that you use for internal processing, or to print a report on a special printer that requires a client-side application.

To use this feature for reports developed in Microsoft Excel, the user must save the file on their local workstation. The user does not enter the file at runtime nor does the report use an existing report file from the report directory. You define the path to this executable file when creating a Client_EXE report service. For example, enter c:/program files/microsoft office/exel.exe in the Report Service URL field.

Any number of Excel reports on a client's workstation can use this report service by creating different reports. To define the report file path, you must create a very specific report parameter. You must set the Report Parameter Name "File_Path" and the Default Value defines the path to the spreadsheet. For example, c:/MyDocuments/Spreadsheets.xls. This parameter must be present or it prevents the file from opening and the user receives an error. You must identify any parameter values you want to pass to the report as additional report parameters. For instructions, see [Setting up Report Parameters](#).

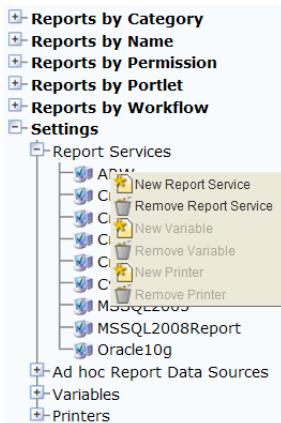
Client-side executables, with the exception of Microsoft Excel, do not require the "File_Path" parameter. You can include the file path in the command line for the Report Service URL. Use this option for executables that you do not use for multiple reports, such as a letter template that populates the agency name, and address. The Report Service URL includes the path to the executable and the report's file.

To pass static parameter values to a report or program, you must add them to the end of the command line. For example, to execute a letter with the agency name and address, use the command line; c:/program files/microsoft word/word.exe C:/MyDocuments/Documents.doc 'Accela, Inc.' '555 So. Main Street, Sandy, Utah'. To pass parameters from the Civic Platform database, you must define the individual parameters for the report. For instructions, see [Setting up Report Parameters](#).

Client-side executable type reports cannot save to an Electronic Document Management System (EDMS). However, users can save the report to their local machine with the standard save options in programs such as Word and Excel.

To add a client-side executable

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Expand the **Settings** node in the navigation tree.
3. Right-click the **Report Services** option and select **New Report Service** from the menu.



Civic Platform displays the Report Service Form.

Report Service Form	
<input type="button" value="Submit"/>	<input type="button" value="Reset"/>
<input type="button" value="Help"/>	
Report Service Name *	<input type="text"/>
Report Service Type *	<input type="text"/> Accela Ad-hoc Report
Report Output Formats	<input type="checkbox"/> Adobe Acrobat (PDF) <input type="checkbox"/> CSV comma delimited(CSV) <input type="checkbox"/> Microsoft Excel 97-2000 (EXCEL) <input type="checkbox"/> Microsoft Word (RTF) <input type="checkbox"/> Rich Text Format (RTF) <input type="checkbox"/> XML file with report data (XML)
Report Name List URL *	<input type="text"/> http://reporting.accela.com/AdHocReport/AdhocReportA
Report Service URL *	<input type="text"/> http://reporting.accela.com/AdHocReport/AdhocReportA

4. Complete the following fields:

- | | |
|----------------------|--|
| Report Service Name | Enter the name of the report service. Use a name that describes the executable. This name appears in the Report Service drop-down list in the report detail form. For example, enter MS Excel EXE. |
| Report Service Type | Select the Client_EXE option. |
| Report Name List URL | Enter the file path to the executable. For example, enter "c:/program files/microsoft excel/excel.exe" If you are defining a path for an executable other than Microsoft Excel, you can define the file path and the static parameters at the end of the command line. For example, enter "c:/program files/microsoft word/word.exe C:/ MyDocuments/Documents.doc 'Accela, Inc.' 555 So. Main Street, Sandy, Utah" |
| Report Service URL | Report Service URL is the server address. |

5. Click **Submit..**

Civic Platform saves the report service.

6. Right-click **Reports by Category and select the **New Report** option.**

Civic Platform displays the report detail form.

Report Name:

Report Detail Parameters Permission Portlets Workflow

Name *	Category *	Output Format *
<input type="text"/>	--Select-- <input type="button"/>	Default Format <input type="button"/>
Send to Printer *	Print Copies	Print Only
None <input type="button"/>	1 <input type="text"/>	No <input type="button"/>
Save to EDMS *	EDMS Object *	EDMS *
No <input type="button"/>	Asset Condition Assessment <input type="button"/>	ACCELA <input type="button"/>
Include on Report Portlet	Process Service *	Report Link *
<input type="checkbox"/> Reports 1 <input type="checkbox"/> Reports 2	ARW <input type="button"/>	<input type="text"/>
<input type="checkbox"/> Reports 3 <input type="checkbox"/> Reports 4		
<input type="checkbox"/> Reports 5		
Description	<input type="checkbox"/> Send in e-mail	Document Group/Category *
<input type="text"/>	All set member Records' contacts <input type="button"/>	--Select-- <input type="button"/> --Select-- <input type="button"/>
check spelling		

7. Complete the following fields:

- | | |
|----------------|--|
| Name | Enter the name of the report. |
| Category | Select the category the report should display under. |
| Report Service | Select the client-side executable report service. For example, select MS Excel EXE or MS Word EXE. |

8. Click **Submit..**

Civic Platform saves the report detail.

9. For Microsoft Excel reports, click the **Parameters** tab.

Civic Platform displays the report parameters list form.

10. Click **New..**

Civic Platform displays the report parameter detail form.

Report Name: Assessor Report

Report Detail Parameters Permission Portlets Workflow

Name *	Type *	Report Parameter Name *
<input type="text"/>	--Select-- <input type="button"/>	<input type="text"/>
Required *	Visible *	Default Value
--Select-- <input type="button"/>	--Select-- <input type="button"/>	<input type="text"/>
Display Order	Mask	
<input type="text"/>	<input type="text"/>	

11. Complete the following fields:

- | | |
|-----------------------|--|
| Name | Enter the name “File Path” to identify the special file path parameter. |
| Type | Select the String data type. |
| Report Parameter Name | Enter “File_Path” as the report parameter name. This parameter name must be present for the excel file to open on the user’s workstation. |
| Default Value | Enter the path to the file on the user’s workstation. For example, enter “c:\My Documents\Spreadsheets.xls” as shown in Figure 58: RTF Report Parameter Detail . |

12. Click **Submit..**

Civic Platform saves the report parameter.

- 13.To add parameter values to pass to the report, click **New**. For information and instructions in [Setting up Report Parameters](#).

Running Reports in EMSE

The Event Management Scripting Engine (EMSE) has full control of launching reports set up in Report Manager. EMSE retrieves the Report Object through the report name and automatically provides parameter values. You can set up reports to save automatically to an Electronic Document Management System (EDMS) in a variety of formats including Adobe Acrobat (.pdf), Microsoft Excel (.xls), and Rich Text Format (.rtf). You can set up an event script to send and save reports to multiple destinations, and then run the reports multiple times. Contact your Accela Services Implementation representative for information on writing and running this kind of event script. For general information on using scripts in Civic Platform, see the Accela Civic Platform Scripting Guide.

Setting a Default Printer

To send a report directly to a printer when a user runs it, you must identify a default printer. The default printers added to Report Manager are available in the Report Detail form portlet shown in [Figure 59: Default Printer Drop-down List](#). You select these printers from the network printer list, ensuring the accessibility to the printer when running the report.

The screenshot shows the 'Report Detail' tab selected in the top navigation bar. The 'Send to Printer' field is highlighted with a red box. A dropdown menu is open, showing 'None' as the current selection. Other options in the menu include 'Printer Name' and 'Printer Type'. The rest of the form contains fields for 'Name', 'Category', 'Output Format', 'Print Copies', 'EDMS Object', 'Process Service', 'Report Link', 'Description', 'Send in e-mail', and 'Document Group/Category'.

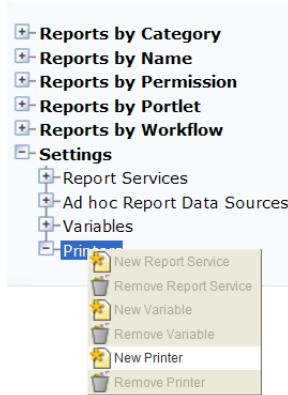
Figure 59: Default Printer Drop-down List

A report that has a default printer assigned prints automatically when a user selects it from the Reports Portlet or from a specific portlet's report menu. You can also set a report with an assigned printer to run based on the status change of a specific workflow task. You can also set a report with an assigned printer to run based on the status change of a specific workflow task. For example, a user prints an application at the time of acceptance. When the user runs the report they receive a message notifying them that the report printing is complete.

To add a default printer to a specific report, select the printer in the Report Detail form portlet. For more information on the Report Detail form portlet, see [Adding a Report](#).

To add a default printer

1. Access the Report Manager portlet ([Accessing the Report Manager Portlet](#)).
2. Expand the **Settings** option from the navigation tree.
3. Right-click the **Printers** option and select **New Printer** from the menu.



Civic Platform displays the add printer portlet.

4. Complete the following fields:

Printer Name	Enter the name of the printer. This name displays in the default printer drop-down list in the Report Detail form.
Printer	Select the network printer you want to use as a default printer when automatically printing reports.

5. Click Submit..

Civic Platform saves the network printer as the default printer.

Using Barcodes in Payment Reports

Payment reports such as invoices developed in Civic Platform can use barcodes to enhance process efficiency.

Barcodes imprinted in the reports or invoices must follow code 39. Each barcode represents some field value, for example, record ID, receipt number, and invoice number. With the reports in the Payments portlet, you can embed a hot key combination in a barcode. When users scan the barcode, the cursor automatically moves to the field indicated by the hot key setting, and the value in the barcode populates the field.

[Table 153: Barcodes for Hot Keys](#) lists the hot keys in the Payment Processing portlet that can be embedded in barcode.

Table 153: Barcodes for Hot Keys

Hot Key	Barcode for the Hot Key	Task
Ctrl + Shift + 1	.W.X1.X.W	To go to the 1st field in the portlet that can get focus.
Ctrl + Shift + 2	.W.X2.X.W	To go to the 2nd field in the portlet that can get focus.
Ctrl + Shift + 3	.W.X3.X.W	To go to the 3rd field in the portlet that can get focus.
Ctrl + Shift + 4	.W.X4.X.W	To go to the 4th field in the portlet that can get focus.
Ctrl + Shift + 5	.W.X5.X.W	To go to the 5th field in the portlet that can get focus.

Hot Key	Barcode for the Hot Key	Task
Ctrl + S	(TBD)	To go to the global search field in the portlet.  Note: After you move the cursor to the global search field, you cannot go to the other fields by scanning the other barcode. This behavior is unique to this hot key.

The Intermec SR30 Handheld scanner is the only scanner that Civic Platform supports for the barcode scanning feature. For information about installation and configuration of the barcode scanner, see "Configuring a Barcode Scanner" in the *Accela Civic Platform Installation Guide*.

SmartCharts

Click a topic title below for full details.

Related Information

[Creating a SmartChart](#)

[Searching for a SmartChart](#)

[Editing a SmartChart](#)

[Deleting a SmartChart](#)

[Managing SmartChart Permissions](#)

[Managing SmartChart Queries](#)

Creating a SmartChart

You can create a SmartChart based on the queries your Accela implementation specialist defines.

To create a SmartChart

1. Access the SmartChart portlet ([Navigating to the Setup Portlet](#)).

2. Click **New**.

Civic Platform displays a blank form in the record detail portlet.

The screenshot shows a configuration interface for a SmartChart. At the top, there are buttons for 'Submit', 'Reset', and 'Help'. Below these are several dropdown menus and input fields:

- SmartChart Title ***: A dropdown menu showing options like 'Yes' and '--Select--'.
- Show Title ***: A dropdown menu showing 'Yes' and 'No'.
- Chart Type ***: A dropdown menu showing '--Select--'.
- Data Source Type ***: A dropdown menu showing 'Query' and '--Select--'.
- Category (X Axis)** section:
 - Column ***: A dropdown menu showing '--Select--'.
 - Category Label**: An input field.
 - Show Label**: A dropdown menu showing 'No'.
 - Show Tick Label**: A dropdown menu showing 'No'.
- Value (Y Axis)** section:
 - Statistical Function ***: A dropdown menu showing 'Count' and 'Numeric Column' (which is selected).
 - Date Operand 1**: A dropdown menu showing '(today)'.
 - Date Operand 2**: A dropdown menu showing '--Select--'.
 - Value Label**: An input field.
 - Show Label**: A dropdown menu showing 'No'.
- Range (start) ***: An input field showing '0.0'.
- Range (end) ***: An input field showing '0.0'.
- Warning Start ***: An input field showing '0.0'.
- Critical Start ***: An input field showing '0.0'.
- Background Color (Hexadecimal) ***: An input field showing 'FFFFFF'.
- Show Legend**: A dropdown menu showing 'No'.
- Thumbnail Width ***: An input field showing '150'.
- Thumbnail Height ***: An input field showing '150'.

3. Complete the applicable fields.

For descriptions of fields, see [Table 154: SmartChart Setup Fields](#).

4. Click **Submit** to save the SmartChart.

Civic Platform updates the SmartChart list.

5. Assign the SmartChart to the desired user groups.

For instructions, see [Managing SmartChart Permissions](#).

Table 154: SmartChart Setup Fields

Background Color	You can enter the HTML hexadecimal equivalent for the color you want directly into this field, if you know what it is. Otherwise, click the icon next to this field and choose a color from the color palette.
Category (X) Axis Label	If you are setting up a column bar chart or a line chart, enter the text you want to display as a label below the horizontal category axis.
Chart Type	Select one of the following: Column Bar Chart, Line Chart, Pie Chart, Odometer, Speedometer.
Column	If you are setting up a column bar or a line chart, choose a column from the list that you want to use to group the SmartChart values. For example, if you want to display a line chart showing the number of each permit application type in your list, choose “Record Type Alias.”
Critical Start	If you are setting up a speedometer, enter the value where you want the speedometer to start displaying a different color, which indicates a critical zone.
Data Source Type	Select a data source type.
Date Column Calculations	If you are setting up a column bar or a line chart, select this option to base your statistical function and resulting SmartChart values on date columns (today, assigned date, closed date, and opened date). Use the Date Operand drop-down lists to specify the starting and ending dates you want to use. Civic Platform subtracts one date from the other and determines the number of days between these dates. Civic Platform uses this number to calculate the resulting SmartChart values. For example, if you want to determine the total number of days it took to process certain types of permit applications after they were submitted, select “Closed Date” in the first operand field and select “Opened Date” in the second.
Module	Select a module.
Numeric Columns	If you are setting up a column bar or a line chart, select this option if you want to base your statistical function and resulting SmartChart values on a numeric column. Specify the numeric column you want to use. For example, if you want to display a pie chart showing on average how far along certain types of permit applications are in the permitting process, choose “Percent Complete.”
Query	Select a query.
Range End	If you are setting up a speedometer, enter the highest value you want to display on the speedometer; this serves as the ending point of your range.
Range Start	If you are setting up a speedometer, enter the lowest value you want to include on the speedometer; this serves as the starting point of your range.
Show Category Value (Vertical) Axis	If you are setting up a column bar or a line chart, choose “Yes” from the drop-down list to display a label below the horizontal (category) axis.
Show Legend	If you are setting up a line chart or a pie chart, select “Yes” if you want to display a legend with the SmartChart.
Show Title	Select “Yes” if you want to display the title at the top of the SmartChart; otherwise, select “No.”
Show Value (Y) Axis Label	If you are setting up a column bar or a line chart, choose “Yes” from the drop-down list to display a label to the left of the vertical (value) axis.
SmartChart Title	Enter a name to help you identify the SmartChart.
Statistical Function	If you are setting up a column bar or a line chart, choose the statistical function from you want to use to calculate numeric SmartChart values. You can choose from the following functions: average, sum, count, minimum, maximum, standard deviation, variance. For example, if you want to display a line chart showing the number of each permit application type in your list, choose “Count.”
Thumbnail Height	Enter the desired height in pixels. In combination with the Thumbnail Width field, this determines the size of thumbnail view of the SmartChart.

Thumbnail Width	Enter the desired width in pixels. In combination with the Thumbnail Height field, this determines the size of the thumbnail view of the SmartChart.
Value (Y) Axis Label	If you are setting up a column bar or a line chart, enter the text you want to display as a label to the left of the vertical (value) axis.
Warning Start	If you are setting up a speedometer, enter the value where you want the speedometer to start displaying a different color, which indicates a warning zone.

Searching for a SmartChart

This section describes how to search for a SmartChart.

To search for a SmartChart

1. Access the SmartChart portlet ([Navigating to the Setup Portlet](#)).
2. Click **Search**.
Civic Platform displays the SmartChart search form.
3. Edit any of the fields that display.
For field descriptions, see [Table 154: SmartChart Setup Fields](#).
4. Click **Submit**.
Civic Platform returns a list of SmartCharts that match your search criteria.

Editing a SmartChart

This section describes how to change existing SmartChart definitions.

To edit a SmartChart

1. Access the SmartChart portlet ([Navigating to the Setup Portlet](#)).
2. Click the link in the **SmartChart Title** column to the SmartChart you want to edit.
If you do not see the SmartChart you are looking for, click **Search**. See [Creating a SmartChart Query](#) for a list of field descriptions.
Civic Platform displays the chart details in the record detail portlet.

The screenshot shows the Civic Platform's SmartChart setup interface. At the top, there are buttons for Submit, Reset, and Help, along with a Data Language dropdown set to English (US). Below these are tabs for SmartChart and Recipient, with the SmartChart tab selected. The main area contains several configuration sections:

- SmartChart Title ***: 2005 Apps by Month
- Show Title ***: Yes
- Chart Type ***: Line Chart
- Data Source Type ***: Query
- SmartChart Query**: Apps by Month, 2005
- List Portlet ***: Record List
- Module ***: --Select--
- Cache Time (seconds)**: 0
- Category (X Axis)**:
 - Column ***: --Select--
 - Category Label**: Show Label
 - Show Tick Label**: --Select--
- Value (Y Axis)**:
 - Statistical Function ***: --Select--
 - Numeric Column**: (radio button selected)
 - Date Column Calculation**: (radio button unselected)
 - Date Operand 1**: --Select--
 - Date Operand 2**: --Select--
 - Value Label**: Show Label
 - Show Label**: No
- Range (start) ***: 0.0
- Range (end) ***: 0.0
- Warning Start ***: 0.0
- Critical Start ***: 0.0
- Background Color (Hexadecimal) ***: FFFFFF
- Show Legend**: No
- Thumbnail Width ***: 150
- Thumbnail Height ***: 150

3. Edit any of the fields that display.

For field descriptions, see [Table 154: SmartChart Setup Fields](#).

4. Click **Submit**.

Civic Platform saves your changes and updates the SmartChart list.

Deleting a SmartChart

If you no longer need a SmartChart, you can remove it from Civic Platform.

To delete a SmartChart

1. Access the SmartChart portlet ([Navigating to the Setup Portlet](#)).
2. Select the SmartChart you want to remove.



Note:

Ensure the SmartChart you select is the one you want to delete. If you remove the wrong SmartChart, you must recreate it.

If you do not see the SmartChart you are looking for click **Search and locate it**. See [Table 154: SmartChart Setup Fields](#) for a list of field descriptions.

3. Click **Delete**.

Civic Platform updates the SmartChart list.

Managing SmartChart Permissions

Topics

- [Assigning Permissions to a SmartChart](#)
- [Removing Permissions from a SmartChart](#)

Assigning Permissions to a SmartChart

You can assign SmartCharts to an agency, a module, or a user group, which enables you to control user access to a SmartChart. For example, SmartCharts that you assign to a user group automatically display in the SmartChart portlets of users who belong to the group. Users who do not want to view the new SmartChart can remove it manually by customizing the portlet contents. For more information on configuring portlets, see [Setting Up Your Console and Home Page](#). To configure forms and views, see [Designing Forms for Portlets](#).

To assign permissions to a SmartChart

1. Access the SmartChart portlet ([Navigating to the Setup Portlet](#)).
 2. Click the link in the **SmartChart Title** column to the chart you want to assign permissions. If you do not see the SmartChart you are looking for, click **Search and Locate it**. See [Table 154: SmartChart Setup Fields](#) for a list of field descriptions.
- Civic Platform displays the chart details in the record detail portlet.
3. Click the **Recipient** tab.
- Civic Platform displays a list of agencies, user groups, and users that can currently view the SmartChart.

Recipient Type	Recipient Key
Module	Building
Group	Inspectors

4. Do one of the following to select the organization level to which you want to assign the SmartChart:
 - Click **Assign Agency** to assign the SmartChart to an entire agency.
 - Click **Assign Module** to assign the SmartChart to all groups associated with a module.
 - Click **Assign User Group** to assign the SmartChart to all members of a user group.

Civic Platform displays an organization structure hierarchy that corresponds to the level you selected. For example, a hierarchy of all the user groups in your agency.
 5. Click the specific agency, module, or user group to which you want to assign the SmartChart.
 6. Click **Submit**.
- Civic Platform updates the recipient list.

Removing Permissions from a SmartChart

You can remove access rights to a SmartChart from an agency, a module, or a user group.

To remove a SmartChart from a recipient

1. Access the SmartChart portlet ([Navigating to the Setup Portlet](#)).
2. Click the link in the **SmartChart Title** column to the chart you want to assign permissions. If you do not see the SmartChart you are looking for click Search and locate it. See [Table 154: SmartChart Setup Fields](#) for a list of field descriptions.
Civic Platform displays the chart details in the record detail portlet.
3. Click the **Recipient** tab.
Civic Platform displays a list of agencies, user groups, and users that can currently view the SmartChart.

Recipient Type	Recipient Key
Module	Building
Group	Inspectors

4. Select the recipient from which you want to remove the SmartChart.
5. Click **Delete**.

Managing SmartChart Queries

Agencies that host their own Civic Platform permit applications can manage the queries that return the information that SmartCharts format. On-premise system administrators can manage these queries by clicking the SmartChart Queries link located in the Setup portlet of Civic Platform. These queries display the SmartChart queries in Civic Platform.

A “Super Agency” does not currently exist for SmartCharts; administrators can create queries only for the agency to which their log in applies. Administrators who want to create a query for multiple agencies must create the same query using an administrator log in for each agency in which they want to create the query.



Note:

Use caution when creating queries so that you do not inadvertently grant access to sensitive data. Queries can provide access to sensitive data and can require an in-depth knowledge of the Civic Platform database. Staff who create queries should have an in-depth knowledge of SQL and a copy of the Civic Platform ERD (Entity Relationship Diagram) for the Civic Platform version that they are using.

Topics

- [Creating a SmartChart Query](#)
- [Searching for a SmartChart Query](#)
- [Editing a SmartChart Query](#)
- [Deleting a SmartChart Query](#)

Creating a SmartChart Query

This section describes how to create a SmartChart query.

To create a SmartChart query

1. Access the SmartChart Queries portlet ([Navigating to the Setup Portlet](#)).

2. Click **New**.

Civic Platform displays a form beneath the query list you use to enter query information.

3. Enter information in the following fields:

Query Name	Enter a name that describes the information the query retrieves.
------------	--

Query SQL	Enter the SQL for the Query.
-----------	------------------------------

The return set of the SQL statement must always have the signature <NUMBER>, <STRING>. For example, the following statement is not valid because its signature is <STRING>, <STRING>:

```
Select b1_per_id1, b1_per_id2 from b1permit where serv_prov_code = '$SERV_PROV_CODE$$'
```

The following correction is valid, because “count(*)” is of type <NUMBER> and b1_per_id1 is of type <STRING>:

```
Select count(*), b1_per_id1 from b1permit where serv_prov_code = '$SERV_PROV_CODE$$' group by b1_per_id1
```

The reason for this requirement is intuitive for the Column Bar, Line, and Pie chart types. <NUMBER> is the value for the Y axis and <STRING> is value for the X axis.

Note that even though the speedometer and the odometer chart types only expect a single numeric value, the SQL statement still requires the <NUMBER>, <STRING> signature, for consistency. You cannot enter statements that do not have the <STRING> part of the signature. For example, the following statement does not work for an odometer chart, because the signature of the return set is just <NUMBER>:

```
Select count(*) from b1permit where serv_prov_code = '$$SERV_PROV_CODE$$'
```

Instead, write the statement as follows:

```
Select count(*), 'BLANK' from b1permit where serv_prov_code = '$SERV_PROV_CODE$$'
```

The <STRING> ('BLANK' in this case) can be any value except an empty string.



Note:

Civic Platform provides a few useful environment variables for your Queries. Prefix the variables with “\$” and terminate them with “\$\$”. Remember to surround variables with single-quotes (‘) if you want Civic Platform to interpret them as strings. You can use the following environment variables anywhere in your Queries:

\$\$SERV_PROV_CODE\$\$. The Service Provider Code (Agency) of the user currently logged-in.

\$\$USERID\$\$. The User ID of the user currently logged-in.

-
4. Click **Submit**.

Civic Platform saves the query and adds it to the query list. This query is now available to administrators from the Query drop-down on SmartChart forms.

Searching for a SmartChart Query

This section describes how to search for a SmartChart query.

To search for a SmartChart query

1. Access the SmartChart Queries portlet ([Navigating to the Setup Portlet](#)).

2. Click **Search**.

Civic Platform displays the SmartChart Query search form.

3. Edit the following search criteria as desired:

Query Name	Edit the query's name.
Query SQL	Edit the SQL for the query.

4. Click **Submit**.

Civic Platform returns a list of SmartChart queries that match your search criteria.

Editing a SmartChart Query

This section describes how to edit a SmartChart query.

To edit a SmartChart query

1. Access the SmartChart Queries portlet ([Navigating to the Setup Portlet](#)).

2. Click the link in the Query Name column of the query you want to edit.

3. Edit information in the following fields, as desired:

Query Name	Edit the query's name.
Query SQL	Edit the SQL for the query.

4. Click **Submit**.

Civic Platform validates the Query. If the query does not execute, or does not have the correct result set signature (<NUMBER>, <STRING>), then Civic Platform displays an error message. If there is no error message, the Query becomes available to administrators on the Query drop-down on SmartChart forms.

Deleting a SmartChart Query

This section describes how to delete a SmartChart query.

To delete a SmartChart query

1. Access the SmartChart Queries portlet ([Navigating to the Setup Portlet](#)).

2. Select the query you want to delete.

Use caution when selecting a query to delete; if you delete the wrong query you might need recreate the entire query.

3. Click **Delete**.

Civic Platform deletes the query and updates the query list.

Part 7: Accounting

Civic Platform provides accounting functions.

Related Information

[Understanding Fee Items](#)

[Fee Formulas](#)

[Invoices and Payment Periods](#)

[Trust Accounts](#)

[Point of Sale](#)

[Payment Processing](#)

[Time Accounting Tracker](#)

Setting Up Fees

This section provides information about the various ways to implement fees and their associated administrative setup. Before you begin, familiarize yourself with the fee setup process as explained in [Understanding Fees and Citizen Access](#).

Click a topic title below for full details.

Related Information

[Understanding Fees and Citizen Access](#)

[Managing Fee Schedules](#)

[Understanding Fee Items](#)

[Setting Up a Flat Fee Item](#)

[Working with Point of Sale Fee Items](#)

[Creating Fees with Fee Calculation and Custom Fields Data](#)

[Adjusting Fees Based on Agency Valuation](#)

[Adjusting Fees based on Occupancy Versioning](#)

[Working with Occupancy Groups](#)

[Prioritizing Fees Using Pay Allocation](#)

[Enabling Fee Estimation](#)

[Purging Partial Application Fees](#)

Understanding Fees and Citizen Access

To ensure Citizen Access generates the fees you want to make available to public users on an application type, do the following:

- Enable the record types you want available in Citizen Access.
- Verify that the Fee Items that you assign to record types available in Citizen Access have the ACA fields defined. Refer to [Understanding Fee Items](#).
- Ensure that the following elements have the required fields defined that enable fee calculations to obtain the data necessary to generate the fee:
 - the application-specific information tables
 - application-specific groups
 - workflow task-specific information groups

Managing Fee Schedules

Topics

- [Searching for a Fee Schedule](#)

- [Creating a New Fee Schedule](#)
- [Editing a Fee Schedule or Creating a New Version](#)
- [Managing Fee Groups](#)
- [Copying a Fee Schedule](#)
- [Assigning a Module to a Fee Schedule](#)

Searching for a Fee Schedule

If you want to locate a particular fee schedule for editing or informational purposes, you can do a search for it. There are multiple ways to search for a Fee Schedule. You can search for fee schedules by name, date, or status.

To search for a Fee Schedule

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Navigate to **Fees > Fee Schedules**.

Civic Platform displays the Fee Schedule - Search Screen

Enter your search criteria with one of the search options below:

a. To search by **Fee Schedule**.

Enter the name of an existing fee schedule in the **Fee Schedule** field.

b. To search by **Version**

Enter the name of an existing fee schedule in the **Fee Schedule field**

Then, enter the version in the **Version** field. You cannot perform a search by version alone.

c. To search by **Effective Date**

Click **Date** to select a date from the calendar or enter a date into the **Effective Date** field manually.

d. To search by **Status**

To return all fee schedules select **All**.

To return only enabled fee schedules, select **Enable**.

To return only disabled fee schedules, select **Disable**.

3. Click **Submit**.

Civic Platform returns a list of fee schedules meeting the defined search criteria.

Creating a New Fee Schedule

Civic Platform provides a way to easily create a fee schedule that can have multiple version numbers that relate to the effective date. Although you can create multiple versions of a fee schedule, only one can be active and enabled at a time. You can configure different versions of a fee schedule, so that the amount of the fee matches the rate of inflation.

To create a fee schedule

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Navigate to **Fees > Fee Schedules**.

3. Click **Add**.

Civic Platform displays the Fee Schedule - Add screen.

Fee Schedule - Add

Use this form to add Fee Schedule

The form consists of several input fields and buttons:

- Fee Schedule * :** A text input field.
- Version * :** A text input field.
- Effective Date * :** A text input field followed by a "Date" button.
- Comment: (max 2000 char)**: A large text area with scroll bars.
- Status :** Radio buttons for Enable and Disable.
- Disabled On :** A text input field followed by a "Date" button.
- Submit** and **Cancel** buttons at the bottom.

4. Complete the fields. See [Table 155: Fee Schedule Fields](#) for a list and description for each fields.

5. Click **Submit**.

Table 155: Fee Schedule Fields

Comment	Provide a comment or a description about the fee schedule. For example, this fee is for a registration or a mobile home application fee.
Disabled On	The last date you enabled the fee schedule. The effective date for a fee schedule is the enable date from one version to the enable date of the next version. The disable date is for your informational and is optional.
Effective Date	Enter the start date for the fee schedule.
Fee Schedule	Provide the name for the fee schedule.
Status	Select whether the fee schedule is active. Choose between Enable or Disable .
Version	Enter the version for the fee schedule. The version must be unique for the fee schedule. Version can be alphanumeric with special characters.

Editing a Fee Schedule or Creating a New Version

After you create a fee schedule, you can modify it to create a new version. You can also edit any fee schedule to change effective dates or status.

To edit a fee schedule

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Fee Schedules**.
3. Search for an existing fee schedule. For more information on how to search for a fee schedule, see [Searching for a Fee Schedule](#).
Civic Platform returns a list of fee schedules meeting the search criteria.
4. Click the red dot next to the fee schedule you want to edit.
Civic Platform displays the Fee Schedule - Edit screen
5. Edit the Fee Schedule. Refer to the following editing options:
 - Modify your fee schedule. Edit fields using the list of field descriptions, see [Table 155: Fee Schedule Fields](#).

- Create a new **Version** for a fee schedule.
Click **Create New Version** and complete the fee schedule fields to create a new version of the fee schedule. The old version remains unchanged.
- Add, Edit, or Disable Fee Items from the fee schedule.
Click **Add** to add a Fee Item or click the red dot next to the Fee Item you want to edit.
For more information on fee items, see [Setting Up a Flat Fee Item](#).

6. Click **Save**.

Managing Fee Groups

In a fee schedule, you can create fee item groups comprised of one or more fee items. When adding fee items to a group, you can add them to an existing group or create a new group for them. When a group is no longer used by any fee item, Civic Platform automatically deletes the group.

Topics

- [Adding Fee Items to a Fee Group](#)
- [Removing Fee Items from a Fee Group](#)

Adding Fee Items to a Fee Group

You can set up a group that contains one or more fee items. You can add a fee item to one or more groups. See [Figure 60: Fee Item List](#).

Edit	Fee Item Code(Default)	Fee Item Code	Fee Group	Fee Schedule	Period	Seq for Calculation	Display Order	Sub Group
<input type="checkbox"/>	• FEE1-NP	FEE1-NP		ALLOCATION-SCH	FINAL		1	
<input type="checkbox"/>	• FEE2-NP	FEE2-NP		ALLOCATION-SCH	FINAL		1	
<input type="checkbox"/>	• FEE-P1	FEE-P1	group1	ALLOCATION-SCH	FINAL		1	
<input type="checkbox"/>	• FEE-P2	FEE-P2	group1	ALLOCATION-SCH	FINAL		1	
<input type="checkbox"/>	• NFEE1-NP	NFEE1-NP		ALLOCATION-SCH	FINAL		1	
<input type="checkbox"/>	• NFEE-P3	NFEE-P3		ALLOCATION-SCH	FINAL		1	

[Add Fee](#) [Add to Group](#) [Remove from Group](#)

Figure 60: Fee Item List

To add fee items to a fee group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Fee Schedules**.
3. Search for an existing fee schedule. For more information on how to search for a fee schedule, see [Searching for a Fee Schedule](#).
Civic Platform returns a list of fee schedules meeting the defined search criteria.
4. Click the red dot next to the fee schedule you want to edit.
Civic Platform displays the Fee Schedule - Edit screen page.
5. Select the fee items that you want to add to the one or more groups.
6. Click the **Add to Group** button.
Civic Platform displays the Fee Item - Assign to Group window.

Fee Item - Assign to Group

Use this form to add Fee Items to one or more groups.

Add to New Group:

Add to Existing Groups:

Document Fee

Submit **Cancel**

7. Do one of the following:

- To create a new group for the fee items, enter a group name in the **Add to New Group** field.
- To add the fee items to the existing groups, select the groups you want in the **Add to Existing Group** list.
- To add the fee items to a new groups as well as to existing groups, do both of the previous steps.

8. Click **Submit**.

Removing Fee Items from a Fee Group

You can remove fee items from assigned groups. Civic Platform automatically deletes groups that do not have any fee items.

To remove fee items from a fee group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Fee Schedules**.
3. Search for an existing fee schedule. For more information on how to search for a fee schedule, see [Searching for a Fee Schedule](#).
Civic Platform returns a list of fee schedules meeting the defined search criteria.
4. Click the red dot next to the fee schedule you want to edit.
Civic Platform displays the Fee Schedule - Edit screen page.
5. Select the fee items you want to remove from their assigned groups.
6. Click **Remove from Group**.
Civic Platform displays the following page.

Fee Item - Remove from Group

Use this form to remove Fee Items from groups.
(Groups that no longer contain fee items will be automatically removed.)

Available Groups:

Document Fee

Submit **Cancel**

7. Select each group in the **Available Groups** list that you want to remove the fee item from.

8. Click **Submit**.

Copying a Fee Schedule

You can copy a fee schedule to create a new fee schedule version and also to eliminate the task to recreate fee items. After you copy the fee schedule with a new name, you can edit the schedule name and modify fee items as appropriate to your agency objectives.

To copy a fee schedule

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Navigate to **Fees > Copy Schedule**.

Civic Platform displays the Copy Schedule window.

Copy Schedule

Use this form to **Copy Schedule**.

Schedule Name * :	<input type="text"/>
Copy Schedule From:	BLD_BASE
Submit	

3. Complete the fields:

Schedule Name Enter a name for the schedule.

Copy Schedule From Choose an existing schedule from the drop-down list.

4. Click **Submit**.

5. Edit the fee item as appropriate to your agency's objectives. For instructions, see [Editing a Fee Schedule or Creating a New Version](#).

Assigning a Module to a Fee Schedule

By default, every fee schedule functions in all modules. You can, however, limit a fee schedule to work in specific modules. For example, if your agency has a building module, a code enforcement module, and a service request module, you can have fee schedules, specific to building permits, that you do not want to assign to the other modules.

To assign a module to a fee schedule

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Navigate to **Fees > Manage Schedule**.

Civic Platform displays the Fee Schedule Search window.

Fee Schedule - Search

Use this form to search Fee Schedule

Fee Schedule:	<input type="text"/>
Module Name:	<input type="text"/>
Record Status:	<input checked="" type="radio"/> All <input type="radio"/> Active <input type="radio"/> Inactive
Submit	

3. Enter any search criteria. You can leave these fields blank to return all the fee schedules.

4. Click **Submit**.

Civic Platform displays the following page.

Fee Schedule - Browse

Use this form to select Fee Schedule
(Click the  below to select.)

Edit	Fee Schedule	Status
	BLD_BASE	A

Search

5. Click the red dot by the fee schedule you want to work with.
- Civic Platform displays the Fee Schedule Edit window.

Fee Schedule - Edit

Use this form to edit Fee Schedule

Fee Schedule * : BLD_BASE
 Status * : Active Inactive
 Module Name :

All Modules 

Save **Cancel**

6. Use the drop-down list to select a module to assign.
 7. Click **Save**.
- Civic Platform returns to the Fee Schedule Browse page.
8. For each additional module you want to assign, repeat steps 4-6.

Understanding Fee Items

Topics

- [Understanding Fee Items](#)
- [Searching for a Fee Item](#)
- [Copying a Fee Item](#)

Understanding Fee Item Fields

This section provides you with descriptions of fee items fields. It is critical to understand how the fee item configuration works so you can create the various ways to create fees in Civic Platform. This section provides instructions on how to create simple fees and complex fees.

To access the fee item page

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Fee Item**.
Civic Platform displays the Fee Item-Search page.
3. Choose one of the following to access a Fee Item page:
 - Click **Add** to create a new fee item.

- Click **Submit** with or without any search criteria. Select a fee item from the results list to display the Fee Item Edit page displays.

Fee Item - Add

Use this form to add Fee Item.

Fee Item Code * :	<input type="text"/>									
Fee Schedule * :	PLN_GENERAL									
Version * :	V1.0									
Fee Description:	<input type="text"/>									
Comment: (max 2000 char)	<input type="text"/>									
Unit:	<input type="button" value="▼"/>									
Calc Formula:	LINEAR_WITH_MIN_MAX									
Calc Variable:	<input type="text"/>									
Default Value:	<input type="text"/>									
Fee Indicator (Qty.):	<input type="text"/>									
Round Fee Item:	<input type="radio"/> Y <input checked="" type="radio"/> N <input type="radio"/> Round Up <input type="radio"/> Round Down <input type="radio"/> Round to Nearest									
Required:	<input type="radio"/> Y <input checked="" type="radio"/> N									
Auto Invoiced:	<input type="radio"/> Y <input checked="" type="radio"/> N									
Auto Assess:	<input type="radio"/> Y <input checked="" type="radio"/> N									
Quantity:	<input type="text"/>									
Priority:	<input type="text"/>									
Minimum:	<input type="text"/>									
Maximum:	<input type="text"/>									
Seq for Calculation:	<input type="text"/>									
Display Order:	<input type="text"/>									
Display in ACA:	<input checked="" type="radio"/> Y <input type="radio"/> N <input type="radio"/> Read-only									
Required in ACA:	<input type="radio"/> Y <input checked="" type="radio"/> N									
Assess Adjustment on Recalculation:	<input type="radio"/> Y <input checked="" type="radio"/> N									
Adjustment Credits Allowed:	<input type="radio"/> Y <input checked="" type="radio"/> N									
Status:	<input checked="" type="radio"/> Enable <input type="radio"/> Disable									
Payment Period * :	<input type="button" value="FINAL"/>									
Sub Group:	<input type="text"/>									
Fee Allocation:	<input checked="" type="radio"/> No Allocation <input type="radio"/> Percentage <input type="radio"/> Fixed Amounts and Residual									
Account Code:	<table border="1"> <tr> <td>1. <input type="text"/></td> <td><input type="text"/></td> <td>% <input type="text"/></td> </tr> <tr> <td>2. <input type="text"/></td> <td><input type="text"/></td> <td>% <input type="text"/></td> </tr> <tr> <td>3. <input type="text"/></td> <td><input type="text"/></td> <td>% <input type="text"/></td> </tr> </table>	1. <input type="text"/>	<input type="text"/>	% <input type="text"/>	2. <input type="text"/>	<input type="text"/>	% <input type="text"/>	3. <input type="text"/>	<input type="text"/>	% <input type="text"/>
1. <input type="text"/>	<input type="text"/>	% <input type="text"/>								
2. <input type="text"/>	<input type="text"/>	% <input type="text"/>								
3. <input type="text"/>	<input type="text"/>	% <input type="text"/>								
<input type="button" value="Save"/> <input type="button" value="Cancel"/>										

Figure 61: Fee Item-Add Page

Table 156: Fee Item Fields

Fee Item Code	Enter a unique code to identify the source or purpose of the fee item. For example, if you use this fee item to calculate the value of a window as part of a remodeling project, enter "Window." If it is a Point of Sale item, provide a unique code to identify the POS item's source and purpose. For example, shirt, hat, map, or mug.
Fee Schedule	Enter the fee schedule that this fee item belongs to. For example, enter "Remodel." For a Point of Sale item, make certain that the fee schedule is exactly the same as the Standard Choice Value Description for POINT_OF_SALE_FEE_SCHEDULE.
	<p>Note:</p> <p>You can add the same fee item to different fee schedules by copying a fee item and changing the fee schedule or applying it to a new version of the fee schedule.</p>

Version	Choose the version for the fee schedule set up for the fee item. A fee schedule can have different versions based on the start and end dates.
Fee Description	Enter a brief description of the fee item to identify its source or purpose. For example, enter "Remodel Window Fee" or a "Map of Sandy City and Streets" for a Point of Sale item.
Comment	Enter a detailed description of the fee item to explain the fees purpose, logic, and any additional information associated to the fee.
Unit	Choose a fee unit from the drop-down list. For example, if you assess the fee depending on area, select the unit representative of square footage.
Calc Formula	<p>Choose the formula that you want to use to calculate this fee item. Accela provides a list of standard fee formulas when you implement Civic Platform.</p> <p>For all point of sale fee items, choose CONSTANT from the drop-down list. The CONSTANT fee formula allows you to establish a set fee independent of ranges or valuations. For example, if you want to establish a flat rate for a city map, you can use the CONSTANT fee formula to establish a \$10 fee. Any fee calculated using this formula is the product of the constant and the quantity that a user enters while assessing fees. For example, if you specify that the constant for a city map is \$10 and a user enters 2 as the quantity, then the total fee for two electrical applications is \$20.00.</p> <p>For more information about calculation formulas, see Fee Formulas.</p>
Calc Variable	<p>Enter the parameter(s) for the fee formula. If you want to define multiple parameters, separate each parameter with a comma. The number and order of the parameters vary depending on the standard fee formula. Administrators define most of these parameters, but agency users or public users generally determine the variable x (Quantity) in the mathematical equation of the fee formula.</p> <p>All Point of Sale items use the CONSTANT Calc Formula, or (ax). So you can enter the amount of the fee for one item (variable a) in this field and it is multiplied by the number a public user enters for the quantity on the application intake form (variable x).</p> <p>Another example of a Calc Variable is when you calculate a fee item based on the LINEAR_WITH_MIN_MAX fee formula (ax + b). You can enter 15,0,0,9999 and, in this example, a = 15, b = 0, minimum value = 0, and the max value = 9999.</p> <p>For more information on variables, see Fee Formulas.</p>
Default Value	If you want the fee item to have a default quantity value, choose Y and enter the default quantity in the field. If you do not want a default quantity, choose N.
Fee Indicator (QTY)	<p>Civic Platform uses this text field to enable you to enter a custom fee indicator to populate the quantity field in ACA. Enter a unique code in this field. When the 'Fee Indicator' in the fee item has a value of (range. \$FI10100\$~\$FI10599\$), Citizen Access locates the application specific information which has the matching 'Fee Indicator' value (range. \$FI10100\$~\$FI10599\$) and then replaces the quantity (Qty) with the ASI value. Citizen Access implements this functionality regardless of 'Auto Assess' settings.</p> <p>If the 'Fee Indicator' in fee item has no value, Citizen Access follows the existing logic to retrieve the 'Quantity' value for the fee item when you set 'Auto Assess' to 'Y'.</p> <p> Note:</p> <p>If the Fee Indicator in the fee item and the fee indicator in ASI do not match, Civic Platform uses the default value of 0. For more information, see Creating Fees with Fee Calculation and Custom Fields Data.</p>

Round Fee Item	If you want the calculated fee item to round to the nearest dollar amount, choose Y, and then choose either Round Up, Round Down, or Round to Nearest dollar. If you want the fee to display the exact value, choose N. For example, your agency charges an Inspection Penalty Fee if a property is not ready for an inspection when the inspector arrives. You can use a percentage formula to penalize 10% of the original inspection fee. This 10% value as calculated by the formula could be \$4.56. To ensure the Inspection Penalty Fee is always a round number, you can choose to round the item up.
Required	If you want to require users to complete the Quantity field, choose Y; otherwise, choose N.
Auto Invoiced	If you want to automatically invoice the fee item, select Y, otherwise, choose N. No indicates that you want to manually invoice the fee items in Civic Platform.  Note: This field does not effect the Fee Item display on the Fee Page or Fee Estimate Page in Citizen Access.
Auto Assess	If you want the fee to add automatically when you save the application for the first time, select Y, otherwise, chose N.
Quantity	Enter the number of items you want to apply to the fee.
Priority	Enter a number to determine the order of payment for the fee item. This field is only necessary if you enable Standard Choice option FULL_PAY_ALLOCATION_OPTIONS. For more information see Prioritizing Fees Using Pay Allocation .
Minimum	Enter the minimum value of the calculated fee value.
Maximum	Enter the maximum value of the calculated fee value.
Seq for Calculation	Enter a number to determine the position of the fee item within the fee calculation sequence.
Display Order	Enter a number to determine the position of the fee item within the fee schedule. For example, if you want the fee item to display before any other fee items, enter 1.
Display in ACA	This field defines permissions for the Fee Item Quantity field in Citizen Access. Options are Y/N/Read-only. Y- Yes indicates the fee item displays on the Citizen Access Fee page. N- No indicates the fee item does not display on the Citizen Access Fee page. Read-Only indicates the fee item displays on the Citizen Access Fee page, but the quantity field is read-only.
Required in ACA	This field becomes active when you set the Display in ACA field to Yes or Read-Only. After the field becomes activate, you can choose Y or N. Y indicates the Fee Item quantity must have a value greater than zero. N indicates you do not require the Fee Item quantity. The value of this field is compatible with EMSE.
Assess Adjustment on Recalculation	If you want to adjust the assessment when recalculating the fee, mark the Y option; otherwise, mark N.
Adjustment Credits Allowed	If you want to allow adjustment credits, mark the Y option; otherwise, mark N.
Status	If you want to make the fee item available to users in Civic Platform, mark Enable; otherwise, mark Disable.

Payment Period	Choose the payment period to which the fee item belongs. For example, if you want to assess and invoice the fee item during the inspection phase of a project, choose Inspection. A payment period is a subset of the fee schedule. For a point of sale item, you must choose Final.
Subgroup	Enter the code for the subgroup to which this fee item belongs. A fee item can belong to multiple subgroups. If you want this fee to belong to more than one subgroup, separate each group with a delimiter such as a comma.
Fee Allocation	This field defines whether and how to split the total fee in the fee item among up to three account codes. Options are No Allocation, Percentage, and Fix Amount and Residual. No Allocation - You do not want to split the fee between account codes. Percentage - You want to split the fee between two or three account codes by percentage. Fix Amount and Residual - You want to split the fee between two or three account codes by fix amount. If you select Percentage or Fixed Amount and Residual in this field, go to the Account Code field to configure the account codes and the allocations.  Note: When public users assess fees, Citizen Access allocates the total fee amount to the account code(s) associated with the fee items as configured. Public users are unaware of the allocation because it happens in the background.
Account Code	If you select Percentage in the Fee Allocation field, enter up to three account codes here, and specify the percent of the fee amount each account code gets. You must make sure that the sum of the percent add up to 100. If you select Fix Amount and Residual in the Fee Allocation field, enter up to three account codes here. You can specify the dollar amount that the first one or two account codes can get, but you cannot specify the dollar amount for the last account code, because the last one gets the residual amount.
Calculated	If you want to use the calculation records to determine a fee value, select Y , otherwise, select N .
Calculation Record #	Click Select to choose the calculation record you want to use to evaluate a fee value. You can call other calculation records from the initial calculation record.

Searching for a Fee Item

Administrators can search for a fee item to view its associated details or make any modifications to it. You can enter a variety of search criteria including the fee code, fee schedule, payment period, subgroup, or the fee description. Civic Platform returns all fee items when you do not enter any search criteria and then Click **Submit**.

To search for a fee item

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Fee Item**.
Civic Platform displays the Fee Item-Search page.

Fee Item - Search

Use this form to add or search Fee Items.

Fee Code:	<input type="text"/>
Fee Schedule:	<input type="text"/>
Payment Period:	<input type="text"/>
Sub Group:	<input type="text"/>
Fee Description:	<input type="text"/>
Status:	<input checked="" type="radio"/> All <input type="radio"/> Enable <input type="radio"/> Disable
<input type="button" value="Submit"/> or <input type="button" value="Add"/> New Fee Item	

3. Enter your search criteria. For information about Fee Item Fields, see [Understanding Fee Items](#).
4. Click **Submit**.
Civic Platform returns a list of fee items meeting the search criteria.
5. Select the fee item you want to work with by clicking the red dot next to the fee item code.

Copying a Fee Item

You can create a new fee item by copying an existing one. After you copy the fee item, you must provide a new fee item name and define the fee item details including the fee schedule, pay period, and the fee formula parameters.

To copy a fee item

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Fee Item**.
Civic Platform displays the Fee Item—Search page.
3. Search for the fee item that you want to copy. For instructions on how to search for a fee, see [Creating Fees with Fee Calculation and Custom Fields Data](#).
Civic Platform displays the Fee Item—Edit page.
4. Click **Copy**.
Civic Platform displays the Fee Item-Add page with field information copied from the previously selected fee item.
5. Update the necessary fields as described in [Understanding Fee Items](#).
6. Click **Save**.

Setting Up a Flat Fee Item

To set up a simple fee item for an application, administrators must have already pre-defined a fee schedule and a payment period. See [Managing Fee Schedules](#) and [Invoices and Payment Periods](#). Then, administrators must create a fee item with configurations for a simple fee. After you set up the fee item on a fee schedule, administrators can assign the fee schedule to one or more application types. A fee

schedule can accommodate multiple fee items. Numerous simple fees and more complex fees can coexist on the same fee schedule.

To create a simple fee

1. Verify an applicable fee schedule and a pay period. See [Managing Fee Schedules](#).
2. Access the Classic Administration page ([Accessing Classic Administration](#)).
3. Navigate to **Fees > Fee Item**.
Civic Platform displays the Fee Item-Search page.
4. Choose one of the following:
 - To create a new fee item click **Add**.
 - To copy an existing fee item and modify it to create a new fee item:
Search for the fee item to copy. Enter search criteria and then click **Submit**. Select the fee item you want to copy and click **Copy**.
Civic Platform displays the Fee Item-Add page.
5. Complete the fee item fields with the following criteria:
 - a. Complete the required fields, **Fee Item Code**, **Fee Schedule**, **Version**, and **Payment Period**.
 - b. Choose **Constant** from the **Calc Formula** drop-down list.
 - c. Customize the fee item by configuring the remaining fee item fields. For definitions of the fee item fields, refer to [Understanding Fee Items](#).
6. Click **Save**.
Civic Platform assigns the fee item to the defined fee schedule.
7. Assign the fee schedule with the flat fee item to appropriate application types. For more information about application types, see [Creating and Configuring Records](#).

Working with Point of Sale Fee Items

For complete information on how to implement point of sale and cashiering, refer to [Point of Sale](#).

Creating Fees with Fee Calculation and Custom Fields Data

This section describes how to create fee calculations and codes. After you create the fee calculation, you can associate the calculation to a fee item with the fee calculation code. See [Understanding Fee Items](#).

This section explains these topics:

- [Using the Fee Calc Utility](#)
- [Using the Fee Calc Criteria Utility](#)
- [Associating Multiple Criteria with One Fee Calculation](#)

- [Associating Fee Calculations with Fee Items](#)

Using the Fee Calc Utility

Use the Fee Calc form to create the if - then statement which is the basis for the calculation. For example, if X is true then do Y, if false then do Z.

There are two operators for each fee calculation. The first operator, Running Total Operator, determines how the calculation deals with the running total. The second operator, Permit Value operator, determines how the fee calculation deals with the field referenced by the fee calculation.

To use the Fee Calc utility

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Navigate to **Fees > Fee Calc**.

Civic Platform displays the Fee Calc Search window.

Fee Calc - Search

Use this form to add or search Fee Calc.

Fee Calc Code:	<input type="text"/>
Effective Date From:	<input type="text"/> Date
Effective Date To:	<input type="text"/> Date
Table Name:	<input type="text" value="--select--"/> ▼
Submit or Add	
New Fee Calc	

3. Enter Fee Calc information and complete one of these options:

- Search for an existing Fee Calc code by clicking the **Submit** button.
- Create a new Fee Calc item by clicking the **Add** button.

Civic Platform displays the Fee Calc - Add page.

Fee Calc - Add

Use this form to add Fee Calc.

Fee Calc Code * :	<input type="text"/>
Effective Date * :	<input type="text"/> Date
Table Name * :	<input type="text" value="App Spec Info"/> ▼
Field Name * :	<input type="text"/> Search
Field Type * :	<input type="text"/>
Calculation Uses Value * :	<input type="text"/>
Running Total Operator * :	<input type="text" value="-Select-"/> ▼
Permit Value Operator * :	<input type="text" value="-Select-"/> ▼
TRUE:	<input type="text"/> Search
FALSE:	<input type="text"/> Search
Description: (240 chars max)	<input style="height: 100px; width: 100%;" type="text"/>
Save Cancel	

4. Enter the appropriate fields for the new or existing calculation.

For a description of Fee Calc fields, see [Table 157: Fee Calc Fields](#).

5. Click **Save**.

Table 157: Fee Calc Fields

Calculation Uses Value	Enter the calculation value for the selected fee calc.
Description	Enter the description for the calculation.
Effective Date	Enter the date the Fee Calculation becomes active.
FALSE	Select another calculation or continue if False.
Fee Calc Code	Enter the Fee Calculation's unique identification code.
Field Name	Use the drop-down menu to select the appropriate field name.
Field Type	Enter the field type for the calculation.
Permit Value Operator	Select the type of mathematical operation to perform on the application value. For a description of operators, see Table 158: Fee Calc Operators .
Running Total Operator	Select the type of mathematical operation to perform on the running total. Select the type of mathematical operation to perform on the application value. For a description of operators, see Table 158: Fee Calc Operators .
Table Name	Use the drop-down menu to select the appropriate table name. You can use the attached tables for calculations. The calculation totals a specific column and it uses that total in another calculation. If an attached table contains two rows, Civic Platform combines the specified column for the two rows, such as $20 + 10 = 30$, and the total is available for evaluation by a fee calculation.
TRUE	Select the next calculation to perform if the results of the fee criteria are True.

Table 158: Fee Calc Operators

Running Total	Permit Value	Description
=	=	No change to the value listed in the Calculation Uses Value field.
=	+	The base fee plus the Calculation Uses Value.
=	-	The base fee minus the Calculation Uses Value.
=	*	The base fee multiplied by the Calculation Uses Value.
=	/	The base fee, divided by the Calculation Uses Value.
+	=	The Calculation Uses Value plus the running total.
+	+	The base fee plus the Calculation Uses Value, plus the running total.
+	-	The base fee minus the Calculation Uses Value, plus the running total.
+	*	The base fee multiplied by the Calculation Uses Value, plus the running total.
+	/	The base fee, divided by the Calculation Uses Value, plus the running total.
-	=	The Running Total minus the Calculation Uses Value.
-	+	The Running Total, minus the base fee plus the Calculation Uses Value.

Running Total	Permit Value	Description
-	-	The Running Total, minus the base fee minus the Calculation Uses Value.
-	*	The Running Total, minus the base fee multiplied by the Calculation Uses Value.
-	/	The Running Total, minus the base fee, divided by the Calculation Uses Value.
*	=	The Calculation Uses Value multiplied by the running total.
*	+	The Running Total, multiplied by the base fee plus the Calculation Uses Value.
*	-	The Running Total, multiplied by the base fee minus the Calculation Uses Value.
*	*	The Running Total, multiplied by the base fee multiplied by the Calculation Uses Value.
*	/	The Running Total, multiplied by the base fee, divided by the Calculation Uses Value.
/	=	The Running Total divided by the Calculation Uses Value.
/	+	The Running Total, divided by the base fee plus the Calculation Uses Value.
/	-	The Running Total, divided by the base fee minus the Calculation Uses Value.
/	*	The Running Total, divided by the base fee multiplied by the Calculation Uses Value.
/	/	The Running Total, divided by the base fee divided the Calculation Uses Value.

Using the Fee Calc Criteria Utility

Use the Fee Calc Criteria form to pull data that fits the fee calculation's stated criteria. You cannot determine some calculations until the data on the application is complete. Fee calculations differ based on the data on the application. The fee criteria determines the path for the fee calculation follows and how to evaluate the data based on the criteria.

To use the Fee Calc Criteria utility

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
 2. Navigate to **Fees > Fee Calc Criteria**.
- Civic Platform displays the Fee Calc Criteria Search window.

Fee Calc Criteria - search

Use this form to search Fee Calc Criteria

Fee Calc Criteria Code:	<input type="text"/>
Fee Calc Code:	<input type="text"/>
Effective Date From:	<input type="text"/> <input type="button" value="Date"/>
Effective Date To:	<input type="text"/> <input type="button" value="Date"/>
Table Name:	--Select-- <input type="button" value="▼"/>
<input type="button" value="Submit"/>	
or	
<input type="button" value="Add"/>	

New Calculation Criteria

3. Enter Fee Calc information and complete one of these options:

- Search for an existing Fee Calc Criteria code by clicking the **Submit** button.
- Create a new Fee Calc Criteria item by clicking the **Add** button.
Civic Platform displays the Fee Calc Criteria - Add page.

Fee Calc Criteria - Add

Use this form to add Fee Calc Criteria

Fee Calc Criteria Code * :	<input type="text"/>
Fee Calc Code * :	<input type="text"/> <input type="button" value="Select"/>
Effective Date * :	<input type="text"/> <input type="button" value="Date"/>
Table Name * :	App Spec Info <input type="button" value="▼"/>
Field Name * :	<input type="text"/> <input type="button" value="Search"/>
Field Type * :	<input type="text"/>
Start Range:	<input type="text"/>
End Range:	<input type="text"/>
Description: <small>(240 chars max)</small>	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

4. Select a Fee Calc Criteria, then enter the appropriate fields for the requested calculation.

For a description of the Fee Calculation Criteria fields, see [Table 159: Fee Calc Criteria Fields](#).

5. Click **Save**.

Table 159: Fee Calc Criteria Fields

Description	Enter the description for the fee calc criteria calculation.
Effective Date	Enter the date the Fee Calculation becomes effective.
End Range	Enter the ending amount for the fee calc criteria.
Fee Calc Code	Enter the code for the Fee Calculation used for this Fee Calc Criteria.
Fee Calc Criteria Code	Enter the Fee Calculation Criteria's unique identification code.
Field Name	Use the drop-down menu to select the appropriate field name. Civic Platform populates these fields based on the Fee Calculation IDs.

Field Type	Enter the field type for the calculation.
Start Range	Enter the starting amount for the fee calc criteria.
Table Name	Use the drop-down menu to select the appropriate table name.

Associating Multiple Criteria with One Fee Calculation

An administrator can add zero (0) to many fee criteria records on a single fee calculation record. Civic Platform evaluates each criteria record as TRUE or FALSE. If all of the fee criteria are TRUE, the fee calculates the TRUE path. If any of the fee criteria records are FALSE, the fee calculates the FALSE path. Civic Platform can also evaluate each criteria record as an AND or OR statement. The table below illustrates how Civic Platform evaluates fee criteria records. Given the following criteria on a single fee calculation:

Criteria 1 = A OR B

Criteria 2 = C OR D

Criteria 3 = E OR F

When you enter the following values into the application data and Civic Platform evaluates them by the criteria, Civic Platform uses a single fee calculation record as illustrated in [Table 160: Single Fee Calculation Evaluation Descriptions](#).

For more information about fee calculations, see [Using the Fee Calc Utility](#). For more information about fee calculation criteria, see [Using the Fee Calc Criteria Utility](#).

Table 160: Single Fee Calculation Evaluation Descriptions

Criteria 1	Criteria 2	Criteria 3	Evaluation
A	A	E	TRUE
A	D	f	TRUE
A	C	Z	FALSE
X	C	F	FALSE
B	Y	F	FALSE
X	Y	Z	FALSE
B	D	F	TRUE

Associating Fee Calculations with Fee Items

After you create the fee calculation, an administrator must associate the Fee Calc with the Fee Item. When a user selects a fee item, the fee calculations associated with that fee item trigger within Civic Platform. For more information about creating or adding fee calculations, see [Creating Fees with Fee Calculation and Custom Fields Data](#).

To associate a fee calculation with a fee item

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
 2. Navigate to **Fees > Fee Items**.
- Civic Platform displays the Fee Item - Search page.

Fee Item - Search

Use this form to add or search Fee Items.

Fee Code:	<input type="text"/>
Fee Schedule:	<input type="text"/>
Payment Period:	<input type="text"/>
Sub Group:	<input type="text"/>
Fee Description:	<input type="text"/>
Status:	<input checked="" type="radio"/> All <input type="radio"/> Enable <input type="radio"/> Disable
<input type="button" value="Submit"/> or <input type="button" value="Add"/> New Fee Item	

3. Enter Fee Item information and complete one of these options:

- Search for an existing Fee Item by clicking the Submit button.
- Create a new Fee Item item by clicking the Add button.

4. Click the red dot by the fee item you want to work with.

Civic Platform displays the Fee Item - Edit page.

5. Enter the fee calculation information in these fields:

Calculated	If you want to use the calculation records to determine a fee value, select Y, otherwise, choose N.
Calculation Record #	Select the calculation record you want to use to evaluate a fee value. You can call other calculation records from the initial calculation record.
Minimum	Enter the minimum value of the calculated fee value.
Maximum	Enter the maximum value of the calculated fee value.

Calculated:	<input type="radio"/> Y <input checked="" type="radio"/> N
Calculation Record#:	<input type="text"/>
Minimum:	<input type="text"/>
Maximum:	<input type="text"/>

6. Click **Save**.

Adjusting Fees Based on Agency Valuation

Topics

- [Managing the Default Valuation Calculator](#)
- [Managing Valuation Calculator Versioning](#)

Managing the Default Valuation Calculator

Topics

- [Adding a Valuation to the Calculator](#)
- [Editing a Valuation for the Calculator](#)
- [Factoring with a Regional Modifier](#)

Adding a Valuation to the Calculator

As users assess fees for new jobs, you might need to add new valuations to your system. A job valuation lets you determine or estimate the market value for a certain type of occupancy.

For example, a Type I apartment complex might include only one bedroom unit valued at less than Type III apartments, which include additional bedrooms and other amenities.

A job value also reflects the value of the work required for occupancy. For example, a Type III apartment complex might require a certain number of man-hours to complete, or a certain type of building materials.

To add a valuation

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Valuation Calc.**
3. Click **Add.**
4. Complete the necessary fields for a valuation calculator line item as described in [Table 161: Valuation Fields](#).
5. Click **Save.**

Table 161: Valuation Fields

Extra Amount	Use this numeric data field to add any extra dollar amounts to the Total Valuation. You can use both positive or negative numbers. Format the number with a decimal (max total numbers before decimal is 6 and max total number after decimal is 2).
Multiplier	Civic Platform uses this numeric data field to modify a valuation. You can use it in addition to the Regional Modifier for calculations. The value entered in this field multiplies the total Valuation (before Extra Amount) in addition to the regional modifier. An agency can valuate based on the multiplier alone, which means it can operate excluding the Regional Modifier. Format the number with a decimal (max total numbers before decimal is 5 and max total number after decimal is 4).
Occupancy	Enter the purpose, or use, of the property or building that is the basis for the valuation. An occupancy is typically a building or part of a building you can occupy, such as apartments, homes, hospitals, auditoriums, churches, or banks.
Type of Work	Enter the qualities of the occupancy that indicate the work required to build the occupancy. For example, if the occupancy is a basement, you might enter "finished" as the qualifier.
Unit	Enter the measurable aspect of work required for the occupancy. The unit enables you to calculate the value of the occupancy, or job value.
Unit Cost	Enter the cost of the unit that you determine is the measurable aspect of the work required for the occupancy. You can automatically adjust all unit costs in your system with a regional modifier. A regional modifier enables you to multiply unit costs depending on market demands. For more information, see Factoring with a Regional Modifier .

Fee Indicator	Enter a unique code to identify this valuation, or job value. For example, if you are calculating the value for a Type I apartment complex, you might enter "APTI." You can use fee indicators in some fee formulas to assess fees.
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Editing a Valuation for the Calculator

As necessary, you can edit existing valuations. You can change the type of work, unit, unit cost, and the fee indicator for any valuation.

To edit a valuation

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Valuation Calc**.
3. Search for the calculation that you want.
4. Complete the necessary fields as described in [Table 161: Valuation Fields](#).
5. Click **Save**.

Factoring with a Regional Modifier

The regional modifier enables you to multiply any unit cost that you set up in the valuation calculator by a factor that you specify. You can use the regional modifier to adjust all unit costs in your system according to market demands. For example, you might need to increase your prices by 10% due to the effects of inflation. When a user assesses fees based on the valuation calculator, Civic Platform adjusts the assessment by the same factor.

If your agency chooses to create a fee modified with occupancy versioning, administrators have the option to configure the fee excluding the regional modifier. You do this by selecting **Exclude from Regional Modifier**. For more details, refer to [Table 162: Valuation Version Fields](#) and [Creating an Occupancy Version](#).

To factor with a regional modifier

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Regional Modifier**.
3. Enter the regional modifier factor in the **Regional Modifier** field.
4. Click **Save**.

Managing Valuation Calculator Versioning

See the Civic Platform Configuration Reference.

Adjusting Fees based on Occupancy Versioning

This section provides information so agencies can create a fee item and then modify it with valuation calculator versioning.

For more information about occupancy groups, see [Working with Occupancy Groups](#). For information on how to run a batch for occupancy versioning, see [Running a Batch Update for Occupancy Versions](#).

Topics

- [Searching for an Occupancy Version](#)
- [Creating an Occupancy Version](#)
- [Editing an Occupancy Version](#)
- [Copying an Occupancy Version](#)
- [Deleting an Occupancy Version](#)

Searching for an Occupancy Version

Agency administrators can search for existing occupancy versions. For example, if you want to clone an existing occupancy to create a new version, you must first locate the existing version.

To search for an occupancy version

1. Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).
2. Search using one of these methods:
 - a. Click **Occupancy By Name** or **Occupancy By Type** in the picker, then select the item you want from the search results.
 - b. Click **Search**, then complete the necessary fields as described in [Table 162: Valuation Version Fields](#), and then click **Submit**.
Civic Platform displays the occupancy search results.
3. Click the name of the occupancy you want to view.
Civic Platform displays the selected occupancy version in the detail portlet.

The screenshot shows a search interface titled "Occupancy: Stores". At the top, there are buttons for "Menu", "Save", "Reset", and "Help". Below the title, there are several input fields and dropdowns. On the left, there are fields for "Occupancy *" (Stores, Version 2011, Unit Cost 44.2, Effective Date 03/06/2005, Status Enabled), and on the right, there are fields for "Type of Work *" (Type V - N, Unit, SQFT, Fee Indicator, Disabled on Date). A checkbox labeled "Exclude from Regional Modifier" is located at the bottom right.

Table 162: Valuation Version Fields

Exclude from Regional Modifier	Select this option to create a valuation occupancy record that excludes the regional modifier to calculate total valuation. Clear this option to enable regional modifier functionality.
Occupancy	Enter the purpose, or use, of the property or building you are basing this valuation on. An occupancy is typically a building or part of a building that you can occupy, such as apartments, homes, hospitals, auditoriums, churches, or banks.
Type of Work	Enter the qualities of the occupancy that indicate the work required to build the occupancy. For example, if the occupancy is a basement, you might enter “finished” as the qualifier.

Version	Enter the occupancy version identifier. This field works with the “Effective Date” and “Disabled on Date” fields to determine which version is active. Only one version can be active at a time.
Unit	Enter the measurable aspect of work required for the occupancy. The unit enables you to calculate the value of the occupancy, or job value.
Unit Cost	<p>Enter the cost of the unit that you determine is the measurable aspect of the work required for the occupancy.</p> <p>You can automatically adjust all unit costs defined on your system with a regional modifier. A regional modifier enables you to multiply unit costs depending on market demands. For more information, see Factoring with a Regional Modifier.</p>
Fee Indicator	Enter a unique code to identify this valuation, or job value. For example, if you are calculating the value for a Type I apartment complex, you might enter “APTI.” You can use fee indicators in some fee formulas to assess fees.
Effective Date	Enter the beginning date for the occupancy version. This field works with the “Version” and “Disabled on Date” fields to determine which version is active. Only one occupancy version can be active at a time. For example, you can configure different versions of occupancy codes so that the amount of the fee matches the rate of inflation. In this case, you can configure the new version to go into effect on the same day you disable the previous version.
Disabled on Date	Enter the end date for the occupancy version. This field works with the “Version” and “Effective Date” fields to determine which version is active. Only one occupancy version can be active at a time. For example, you can configure different versions of occupancy codes so that the amount of the fee matches the rate of inflation. In this case, you can configure the new version to go into effect on the same day you disable the previous version.
Status	Select “Enabled” or “Disabled” from the drop-down menu to determine whether this version of the occupancy is active. If you select “Enabled,” the version is active, and displays for the Civic Platform user.

Creating an Occupancy Version

You can create a new valuation calculation occupancy version according to your agency’s needs. For example, your agency specializes in Residential properties and adds duplexes as a new structure type. You can create a new occupancy code for duplexes.

To create a valuation occupancy version

1. Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).
2. Open a New Occupancy form using one of these methods:
 - Right-click on any of the Occupancy By Name or Occupancy By Type options in the picker, and then click **New Occupancy** in the pop-up.
 - Click **New** in the Occupancy Maintenance list toolbar:
Civic Platform displays the new Occupancy form in the detail portlet.

The screenshot shows a form titled 'Occupancy:' with the following fields:

- Occupancy ***: A text input field.
- Version ***: A text input field.
- Unit Cost**: A text input field.
- Effective Date ***: A date input field with a calendar icon.
- Status**: A dropdown menu with 'Enabled' selected.
- Type of Work ***: A text input field.
- Unit**: A text input field.
- Fee Indicator**: A text input field.
- Disabled on Date**: A date input field with a calendar icon.
- Exclude from Regional Modifier**: A checkbox.

At the top of the form are buttons for 'Menu', 'Submit', 'Reset', and 'Help'.

3. Complete the necessary fields as described in [Table 162: Valuation Version Fields](#).
4. Click **Submit**.

Editing an Occupancy Version

You can edit the details of a valuation occupancy. For example, can configure different versions of occupancy codes so that the amount of the fee matches the rate of inflation. You edit the existing version to determine the Disabled on Date, and then create a new version to be effective on a certain date.

To edit an occupancy version

1. Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).
2. Search for the occupancy version you want to edit.
For instructions on searching for an occupancy version, see [Searching for an Occupancy Version](#).
Civic Platform displays the occupancy version details in the secondary portlet.
3. Update the necessary fields as described in [Table 162: Valuation Version Fields](#).
4. Click **Submit**.

Copying an Occupancy Version

You can copy the information from an occupancy version to create a new version. Copying versions saves you time, as the fields for the new version automatically populate based on the values from the previous version. For example, you can configure different versions of occupancy codes so that the amount of the fee matches the rate of inflation. You can clone the previous occupancy version, and then update the values in the Version, Unit Cost, and Effective Date fields. This new version becomes effective on the same date you disabled the previous version. Only one valuation version can be active at one time.

To copy an occupancy version

1. Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).
2. Search for the occupancy version you want to copy.
For instructions on searching for an occupancy version, see [Searching for an Occupancy Version](#).
Civic Platform displays the occupancy versions that match the search criteria in the list portlet.
3. Select the occupancy you want to copy, and then click **Copy**.
Civic Platform populates the fields in the detail portlet, based on the values from the copied occupancy.

Occupancy: Stores

Menu ▾ Submit Reset Help

Occupancy *	Type of Work *
Stores	Copy of (Sqft) Type V - N
Version *	Unit
2011	SQFT
Unit Cost	Fee Indicator
44.2	
Effective Date *	Disabled on Date
03/06/2005	
Status	<input type="checkbox"/> Exclude from Regional Modifier
Enabled	

- Update the desired fields as described in [Table 162: Valuation Version Fields](#).


Note:

The Type of Work field is the only field that does not populate the exact value from the parent version. This field populates as "Copy of <value>"

- Click **Submit**.

Deleting an Occupancy Version

You can delete an occupancy version if needed.

To delete an occupancy version

- Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).
- Search for the occupancy version you want to delete.
For instructions on searching for an occupancy version, see [Searching for an Occupancy Version](#). Civic Platform displays the occupancy versions that match the search criteria in the list portlet.
- Select the occupancy you want to delete.
- Click **Delete**.

Working with Occupancy Groups

Topics

- [Managing Occupancy Groups](#)
- [Associating Occupancies with an Occupancy Group](#)
- [Running a Batch Update for Occupancy Versions](#)
- [Associating an Occupancy Group with Record Types](#)

Managing Occupancy Groups

The Group Maintenance navigation tree enables you to manage all the information associated with occupancy groups, including creating, searching, and deleting groups.

Topics

- [Searching for an Occupancy Group](#)
- [Creating an Occupancy Group](#)
- [Editing an Occupancy Group](#)
- [Deleting an Occupancy Group](#)

Searching for an Occupancy Group

Agency administrators can search for existing occupancy groups and modify the group information. For example, if you want to run a batch update for selected occupancy versions, you must first locate the occupancy group.

To search for an occupancy group

1. Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).
2. Navigate to Civic Platform V360 and click the **Admin** primary tab.
3. In the **Setup** portlet, click the **Valuation Calculator** item and choose Occupancy from the drop-down menu.

Civic Platform displays the Valuation Calculator tool.

4. Click **Search**.

Civic Platform displays the Occupancy Group Search page.

5. Enter the name of the group name you want to locate in the Group Name field and click **Submit**.

Civic Platform displays the occupancy groups that match your criteria in the Occupancy Group Maintenance list portlet.

The screenshot shows the 'Occupancy Group Maintenance' portlet. In the left sidebar, 'Group Maintenance' is selected. The main area displays a form with a 'Group Name' field containing 'ICBO'. Below the form are buttons for 'Save', 'Reset', and 'Help'. At the bottom, there are tabs for 'Detail', 'Associated Occupancy (169)', 'Batch Update', and 'Record Types (0)'. A message at the bottom states 'Group Name * ICBO'.

Creating an Occupancy Group

Agency administrators can create occupancy groups to manage occupancy types and versions. For example, you can group together similar occupancies by creating a group for residential occupancies and a group for commercial occupancies.

To create an occupancy group

1. Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).

2. Click **New** in the Group Maintenance list toolbar:

Civic Platform displays the new Group Occupancy form in the Occupancy Group Maintenance detail portlet.

The screenshot shows the 'Occupancy Group Maintenance' portlet. In the left sidebar, 'Group Maintenance' is selected. The main area displays a form with a 'Group Name' field containing 'Group C'. Below the form are buttons for 'Submit', 'Reset', 'Cancel', and 'Help'. At the bottom, there are tabs for 'Detail', 'Associated Occupancy (0)', 'Batch Update', and 'Record Types (0)'. A message at the bottom states 'Group Name * Group C'.

3. Enter a unique group name and then click **Submit**.

Civic Platform displays a confirmation message indicating that you successfully created the group.

The screenshot shows the 'Occupancy Group Maintenance' portlet. In the left sidebar, 'Group Maintenance' is selected. The main area displays a confirmation message: 'The record was created successfully.' Below it is a form with a 'Group Name' field containing 'Group C'. Below the form are buttons for 'Save', 'Reset', and 'Help'. At the bottom, there are tabs for 'Detail', 'Associated Occupancy (0)', 'Batch Update', and 'Record Types (0)'. A message at the bottom states 'Group Name * Group C'.

4. Add occupancy versions to the group by completing the steps described in [Creating Occupancy Version Associations](#).

Editing an Occupancy Group

You can edit the details of an occupancy group. For example, you can associate additional occupancy versions with a group or remove occupancy version associations.

To edit an occupancy group

1. Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).
2. Search for the occupancy group you want to edit.
For instructions on searching for an occupancy group, see [Searching for an Occupancy Group](#).
3. Update the occupancy group name and associated occupancy versions. For more information on working with occupancy associations, see [Associating Occupancies with an Occupancy Group](#).
4. Click **Save**.
Civic Platform saves the changes and displays a confirmation message.

The screenshot shows a web-based application interface for managing occupancy groups. At the top, there's a header bar with buttons for 'Menu', 'Save', 'Reset', and 'Help'. Below the header, there are tabs for 'Detail', 'Associated Occupancy (1)', 'Batch Update', and 'Record Types (0)'. A success message 'The record was updated successfully.' is displayed above a form field labeled 'Group Name *' which contains the value 'Group C'. The overall background is light blue.

Deleting an Occupancy Group

You can delete an occupancy group as needed. When you delete an occupancy group, you remove the association between the occupancy and the occupancy group; you do not delete the occupancies from Civic Platform.

To delete an occupancy group

1. Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).
For instructions on searching for an occupancy group, see [Searching for an Occupancy Group](#).
Civic Platform displays the search results in the Occupancy Group list portlet.
2. Select the occupancy group you want to delete.
3. Click **Delete**.
Civic Platform displays a confirmation message.

The screenshot shows a web-based application interface for managing occupancy groups. At the top, there's a header bar with buttons for 'Menu', 'New', 'Search', 'Delete', and 'Help'. Below the header, a message '1 record(s) deleted successfully.' is displayed above a list of checkboxes. The list includes 'Group Name' (unchecked), 'Group C' (checked and highlighted in blue), 'BVD 2011' (unchecked), 'BVD' (unchecked), and 'ICBO' (unchecked). The overall background is light blue.

Associating Occupancies with an Occupancy Group

System administrators create occupancy groups by associating occupancy versions with an occupancy group name. After you create an occupancy group, you can establish occupancy version associations by going to the Associated Occupancy tab. For example, you can create an occupancy group for commercial structures. You can then associate commercial occupancies, which can include office buildings, hospitals, and schools, with the commercial occupancy group. Occupancy versions can belong to one or more groups.

The Associated Occupancy tab provides you with the option of cloning occupancy versions. When you clone an occupancy version, you add the new occupancy version to all the occupancies in the same group.

Topics

- [Creating Occupancy Version Associations](#)
- [Deleting Occupancy Version Associations](#)
- [Cloning Occupancy Versions](#)

Creating Occupancy Version Associations

You can customize occupancy groups by establishing occupancy version associations.

To create an occupancy version association

1. Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).
2. Click the Group Maintenance picker.
Civic Platform displays the Group Maintenance list portlet.
3. Click the occupancy group to which you want to add occupancy version associations.
Civic Platform displays the Group Maintenance detail portlet.

Occupancy Group Maintenance:

Menu New Search Delete Help

<input type="checkbox"/> <u>Group Name</u>
<input checked="" type="checkbox"/> <u>Group C</u>
<input type="checkbox"/> <u>BVD 2011</u>
<input type="checkbox"/> <u>BVD</u>
<input type="checkbox"/> <u>ICBO</u>

Group Name: Group C

Menu Save Reset Help

Detail Associated Occupancy (1) Batch Update Record Types (0)

Group Name *
Group C

4. Click the **Associated Occupancy** tab.
Civic Platform displays the Associated Occupancy detail portlet.

Group Name: Group C

Menu Look Up Delete Clone Clone All Help

Detail Associated Occupancy (1) Batch Update Record Types (0)

<input type="checkbox"/> <u>Occupancy</u>	<u>Type of Work</u>	<u>Version</u>	<u>Status</u>	<u>Exclude from Regional Modifier</u>
<input checked="" type="checkbox"/> A-1 Assembly, theater wo stage	IA	08/2011	Enabled	No

5. Click **Look Up**, complete the associated fields, and then click **Submit**. For a complete list of fields that appear in the Occupancy Search Portlet, see [Table 162: Valuation Version Fields](#).
Civic Platform displays the occupancy versions that match your criteria in the detail portlet.

Group Name: Group C

Menu ▾ Submit Reset Cancel Help

Detail Associated Occupancy (1) Batch Update Record Types (0)

<input type="checkbox"/> Occupancy	Type of Work	Version	Unit	Unit Cost	Effective Date	Disabled on Date
<input checked="" type="checkbox"/> \$FI00001\$	test	2013	\$	10	2013/01/18	
<input type="checkbox"/> \$FI00002\$	test	2013	\$	20	2013/01/18	
<input type="checkbox"/> \$FI00003\$	test	2013	\$	30	2013/01/18	
<input type="checkbox"/> A-1 Assembly, theater wo stage	IA	08/2011	sq ft	195.09	2011/08/19	
<input type="checkbox"/> A-1 Assembly, theater wo stage	IB	08/2011	sq ft	187.85	2011/08/19	
<input type="checkbox"/> A-1 Assembly, theater wo stage	IIA	08/2011	sq ft	182.55	2011/08/19	
<input type="checkbox"/> A-1 Assembly, theater wo stage	IIB	08/2011	sq ft	173.78	2011/08/19	
<input type="checkbox"/> A-1 Assembly, theater wo stage	IIIA	08/2011	sq ft	161.91	2011/08/19	
<input type="checkbox"/> A-1 Assembly, theater wo stage	IIIB	08/2011	sq ft	156.91	2011/08/19	

6. Select the name of the occupancy version you want to associate.

7. Click **Save**.

Civic Platform adds the occupancy version, and then displays the Associated Occupancy detail portlet.

Group Name: Group C

Menu ▾ Look Up Delete Clone Clone All Help

Detail Associated Occupancy (2) Batch Update Record Types (0)

1 record(s) added successfully.

<input type="checkbox"/> Occupancy	Type of Work	Version	Status	Exclude from Regional Modifier
<input type="checkbox"/> \$FI00002\$	test	2013	Enabled	No
<input type="checkbox"/> A-1 Assembly, theater wo stage	IA	08/2011	Enabled	No

Deleting Occupancy Version Associations

You can remove the association between occupancy versions and occupancy groups as needed. For example, when you clone occupancy versions, you might need to remove occupancy versions that are not applicable to the new group.

To delete an occupancy version association

1. Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).

2. Click the Group Maintenance picker.

Civic Platform displays the Group Maintenance list portlet.

3. Click the occupancy group for which you want to remove occupancy version associations.

Civic Platform displays the Group Maintenance detail portlet.

4. Click the **Associated Occupancy** tab.

Civic Platform displays the Associated Occupancy detail portlet.

Group Name: Group C

Menu ▾ Look Up Delete Clone Clone All Help

Detail Associated Occupancy (1) Batch Update Record Types (0)

<input type="checkbox"/> Occupancy	Type of Work	Version	Status	<u>Exclude from Regional Modifier</u>
<input type="checkbox"/> A-1 Assembly, theater wo stage	IA	08/2011	Enabled	No

5. Select the occupancy version for which you want to remove an association and click **Delete**. Civic Platform deletes the occupancy version association and refreshes the Associated Occupancy detail portlet.

Group Name: Group C

Menu ▾ Look Up Delete Clone Clone All Help

Detail Associated Occupancy (0) Batch Update Record Types (0)

1 record(s) deleted successfully.

<input type="checkbox"/> Occupancy	Type of Work	Version	Status	<u>Exclude from Regional Modifier</u>
0 record(s) found.				

Cloning Occupancy Versions

Each occupancy group can contain different occupancy versions. You can clone each occupancy version one or more times. When you clone occupancy versions, you can create new occupancy groups for similar occupancies without having to reassociate occupancy versions with a group.

When you clone an occupancy version, you can modify the Version, Effective Date, and Disabled on Date fields. The values for the Unit, Unit Cost, Fee Indicator, and Status fields remain the same as the version used for cloning.



Note:

If there are multiple occupancy versions with the same occupancy and the same type of work, Civic Platform only clones the most recent version.

To clone an occupancy version

1. Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).
2. Click the Group Maintenance picker.
Civic Platform displays the Group Maintenance list portlet.
3. Click the occupancy group that contains the occupancy versions you want to clone.
Civic Platform displays the Group Maintenance detail portlet.
4. Click the **Associated Occupancy** tab.
Civic Platform displays the Associated Occupancy detail portlet.
5. Clone one, multiple, or all occupancy versions:
 - Clone one or more occupancy versions.
Select the versions you want to clone, and then click **Clone**.
 - Click the **Clone All** button to clone all occupancy versions.
Civic Platform displays the Occupancy Version Clone portlet.

Group Name: Group C

Menu ▾ Submit Reset Cancel Help

Detail Associated Occupancy (2) Batch Update Record Types (0)

Group Name	Version *
<input type="text"/>	<input type="text"/>
Effective Date *	Disabled on Date
<input type="text" value="01/19/2013"/>	<input type="text"/>

6. Complete the fields in the Occupancy Version Clone portlet and click **Submit**. For a complete list of occupancy version clone fields, see [Table 163: Occupancy Version Clone Fields](#).

Civic Platform creates the new occupancy version for the occupancies in the selected group and refreshes the Associated Occupancy detail portlet.

Group Name: Group C

Menu ▾ Look Up Delete Clone Clone All Help

Detail Associated Occupancy (2) Batch Update Record Types (0)

2 record(s) cloned successfully.

<input type="checkbox"/> Occupancy	Type of Work	Version	Status	<u>Exclude from Regional Modifier</u>
<input type="checkbox"/> Schools	Type IA	Electrica...	Enabled	Yes
<input type="checkbox"/> Libraries	Type I	Electrica...	Enabled	Yes

Table 163: Occupancy Version Clone Fields

Disabled on Date	Enter the end date for the occupancy version. This field works with the “Version” and “Disabled on Date” fields to determine which version is active. Only one occupancy version can be active at a time. For example, you can configure different versions of occupancy codes so that the amount of the fee matches the rate of inflation. In this case, you want the new version to go into effect on the same day you disable the previous version.
Effective Date	Enter the beginning date for the occupancy version. This field works with the “Version” and “Disabled on Date” fields to determine which version is active. Only one occupancy version can be active at a time. The default value for this field is one day after the disabled date of the cloned occupancy version. For example, if you clone an occupancy version with a disabled on date of 5/6/12, then the default effective date for the new occupancy is 5/7/12.
Group Name	Enter the group name you to which you want to copy occupancy versions. If you leave this field blank, Civic Platform clones the occupancy versions to the current group. If you enter a new group name in this field, it creates a new group and it clones the selected occupancy versions to the new group.
Version	Enter a unique name or a unique number sequence to identify the version. This field works with the “Effective Date” and “Disabled on Date” fields to determine which version is active. Only one version can be active at a time. If you enter a version name or version number that is currently in use, Civic Platform prompts you to enter a unique version identifier. This field is a mandatory field and it is case-sensitive.

Running a Batch Update for Occupancy Versions

You can simultaneously update occupancy version values in an occupancy group using the Batch Update tab. For example, if you want the occupancy versions in a particular occupancy group to correspond to the end dates of a financial quarter, you can update the dates for all the versions at once. When you save your changes, Civic Platform updates all the occupancy versions in the selected occupancy group.

If you run a batch update for multiple versions that include the same occupancy name and same type of work, Civic Platform only updates the most recent version. When you update an occupancy version, all the groups to which the occupancy version belongs reflect the changes.

To run a batch update for occupancy versions

1. Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).
2. Click the Group Maintenance picker.
Civic Platform displays the Group Maintenance list portlet.
3. Click the occupancy group that contains the occupancy versions you want to update.
Civic Platform displays the Group Maintenance detail portlet.
4. Click the **Batch Update** tab.
Civic Platform displays the Batch Update detail portlet.

The screenshot shows the Group Maintenance detail portlet for 'Group C'. The 'Batch Update' tab is selected. The form includes fields for Unit, Fee Indicator, Disabled on Date, Unit Cost, Effective Date, and Status. There is also a checkbox for 'Exclude from Regional Modifier'.

5. Complete the fields in the Batch Update list portlet. For a complete list of fields, see [Table 162: Valuation Version Fields](#).
6. Click **Submit**.

Civic Platform updates all the occupancy versions in the selected occupancy group.

The screenshot shows the Group Maintenance detail portlet for 'Group C'. A message '2 record(s) updated successfully.' is displayed above the form. The fields are identical to the previous screenshot.

Associating an Occupancy Group with Record Types

After putting occupancies into a group, you can assign the occupancy group to record types. Doing so enables you to associate occupancies in the group with the records of the corresponding record types during the record creation process.

To associate an occupancy group with record types

1. Access the Occupancy Administration portlet ([Navigating to the Setup Portlet](#)).
2. Click the Group Maintenance picker.
Civic Platform displays the Group Maintenance list portlet.
3. Click the occupancy group that you want to associate with record types.
Civic Platform displays the Group Maintenance detail portlet.

4. Click the Record Types tab.

Civic Platform displays a list of record types you associated with the occupancy group.

5. Click Assign.

Civic Platform displays the record type navigation tree.

6. Use the + and - buttons to expand and collapse the navigation tree to find the record type to which you want to assign the occupancy group.

7. Select the desired record type.

You can choose to assign the occupancy group to multiple record types.

Select an item on a higher level to select everything below that level.

8. Click Submit.

Civic Platform assigns the record types to the specified occupancy group.

Prioritizing Fees Using Pay Allocation

Administrators have the option to set the priority of fee items. This option allows users to apply full payment to the most important items first, rather than applying the payment to a percentage of all items equally. Items you do not prioritize default to the lowest priority. Civic Platform disburses payment to the priority items first according to order of priority, then paid to the rest of the items based on a percentage of the remaining payment.

For example, there are three fee items outstanding. If you enable this feature and enter the item priority, Civic Platform pays in full the item with the highest priority, then the second, then the third, and so forth. If you do not enable the feature, Civic Platform automatically distributes payments to each of the fee items by percentage.

Enabling Fee Estimation

For feature functionality, administrators must do the following: 1-Enable the related Function Identification (FID) numbers. 2- Predefine fee schedules with applicable fee items for application types. 3- Indicate which fields require user information so Civic Platform can generate fee item calculations. Administrators can define required fields for the following areas of the software:

- Application-Specific Information groups
- Application-Specific Information tables
- Workflow Task-Specific Information groups

When an agency sets a field as required for fee calculation, Civic Platform displays the letter F beside the field.

To allow estimation of fees on partially completed applications

1. Enable fee estimation for Application Type Categories.

- a. Open each application type for which you want to enable fee estimation.

- b. Select **Enable Fee Estimation**. You must select this option to enable Fee Estimation in Citizen Access.
 - c. Verify a **Fee Schedule**.
If your agency uses Citizen Access, you must define which fee items on the fee schedule display, are mandatory, and invoiced so they display for public users online. See [Understanding Fee Items](#).
 - d. Click **Save**.
2. Define the required fields for fee calculation information in application-specific information groups:
 - a. Define any fields you want to require user information with regard to fee calculations. For instructions, see [Working with Custom Fields Groups and Subgroups](#).
 - b. In the Application Specific Information group, choose **Yes** in the **Required** field.
 - c. In the Application Specific Information group, choose **Yes** in the **Req for Fee Calc** field.
3. 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 [Creating Custom Fields Lookup Tables](#).
 - 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.
4. 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 [Creating Task Statuses](#).
 - 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.
 - d. Save your changes.

Purging Partial Application Fees

Partial applications are those applications that users save without submitting or save and resume later. A Civic Platform administrator defines how many days partially completed applications remain in Civic Platform before it removes them. Civic Platform also deletes the assessed fees that have associations with the applications. For instructions on how to purge partial applications from Civic Platform using a batch job script, see [Creating a Script Batch Job](#).

Fee Formulas

Fee formulas enable you to configure how Civic Platform calculates fees. Ideally, a user should not need to think about how Civic Platform generates fees when they enter a fee quantity. You can assist users and facilitate ease-of-use by configuring fee amounts and the parameters that generate calculations. For example, you can establish minimum fees and maximum fees. It is important to note, however, that while you can configure fee amounts and fee quantities, you cannot modify the fee formulas themselves, as they are part of the standard configuration that comes with Civic Platform.

When a user assesses a fee, Civic Platform calculates the fee based on parameters such as constants, quantities, job values, or values from a specific information field on an application.

Some formulas allow you to include constants and application specific field values. You can include these values as part of your parameters (also known as calculation variables) when you set up a fee item. For instructions, see [Understanding Fee Items](#). If you choose to use application specific field values in your fee formula, you must use a fee indicator that corresponds with the fee indicator referenced within the application specific information field. For more information, see [Creating Custom Fields](#).

Click a topic title below for full details.

Related Information

[CONSTANT Formula](#)

[FEE_MULTIPLIER Formula](#)

[FIXED_FEE_BY_RANGE Formula](#)

[FIXED_FEE_BY_RANGE_ENHANCED Formula](#)

[FIXED_FEE_BY_RANGE_MULTIPLIER Formula](#)

[ICBO_BLDG_PERMIT Formula](#)

[ICBO_STYLE Formula](#)

[ICBO_STYLE_ENHANCED Formula](#)

[LINEAR_MIN_MAX_RANGE_PARAM Formula](#)

[LINEAR_MIN_MAX_VALUATION Formula](#)

[LINEAR_WITH_MIN_MAX Formula](#)

[LINEAR_WITH_MIN_MAX_ENHANCED Formula](#)

[MIN_FEE_ADD_ON Formula](#)

[MIN_FEE_ADD_ON_FEESCHEDULE Formula](#)

[PENALTY Formula](#)

[SG-LINEAR_WITH_MIN_MAX Formula](#)

[SG-PERCENTAGE Formula](#)

CONSTANT Formula

The CONSTANT fee formula enables you to establish a set fee independent of ranges or valuations. For example, if you want to establish a flat \$35 rate for an electrical permit, you can use the CONSTANT fee formula to establish the \$35 fee.

Any fee calculated using this formula is the product of the constant and the quantity that a user enters while assessing fees. For example, if you determine the constant for any electrical permit to be "35" and a user enters "2" as the quantity, then the total fee for two electrical permits is \$70.00.

Input Parameter Format

a

Example

Electrical Permit Fee is \$35. The user enters in 1 unit. The formula calculates as \$35.

Input Parameter Definitions

- a The rate constant for any fee Civic Platform calculates using this formula.

FEE_MULTIPLIER Formula

The FEE MULTIPLIER formula lets you calculate fees based on the product of two or more parameters as well as the quantity from a fee assessment. You specify the number of parameters and the value of each parameter. You can use fee indicators as input parameters and for specifying constant value.

A fee indicator is a unique 5-digit indicator that identifies a certain application specific field value. When using a fee indicator as an input parameter, you must use a value between 10100 and 10599 and use this format: \$fixxxxx\$, such as \$fi10101\$. For more information about entering input parameters, see [Setting Up Fees](#).

A sample use case for FEE_MULTIPLIER is to calculate parking fees. For example, you can use this formula to calculate a parking fee that is the product of a fixed fee, multiplied by the number of cars, and the number of days those cars remain in a parking garage.

If your agency charges \$15.00 per car per day to park in a company garage and the number of cars in the garage (calculated from an application specific field that uses a fee indicator) is 2 and the number of days those cars were in the garage (calculated from the quantity entered on the fee assessment) is 5, then the total fee assessment is $15 \times 2 \times 5$ or \$150.

Formula Equation

$x * a * b * c * ...n$

Input Parameter Format

a,b,c,...n

Example

Parking fees = Number of Cars * Number of Days parked * Fee(\$) /Day /Car.

X = number of cars

Formula Parameter: \$FI10101\$,\$FI10102\$

So, if X = 5 cars, \$FI10101\$ = 10 days and \$FI10102\$ = 15.00 dollars

Then Parking Fee = $5 * 10 * 15 = 750.00$ dollars

Input Parameter Definition

- a Any value that you want to use to calculate the FEE_MULTIPLIER fee item. In addition to fixed values, you can also enter a fee indicator, such as \$fi10101\$. To calculate the fee, Civic Platform multiplies this value by any other input parameters as well as the quantity that the user enters on the fee assessment page.
- b Any value that you want to use to calculate the FEE_MULTIPLIER fee item. In addition to fixed values, you can also enter a fee indicator, such as \$fi10101\$. To calculate the fee, Civic Platform multiplies this value by any other input parameters as well as the quantity that the user enters on the fee assessment page.
- n Any value that you want to use to calculate the FEE_MULTIPLIER fee item. In addition to fixed values, you can also enter a fee indicator, such as \$fi10101\$. To calculate the fee, Civic Platform multiplies this value by any other input parameters as well as the quantity that the user enters on the fee assessment page.
- X User input.

Conditions

There is no limit to the number of parameters or fee indicators that you can specify. You can also use negative parameters.

FIXED_FEE_BY_RANGE Formula

The FIXED FEE BY RANGE formula lets you assess a fixed, or set fee depending on the quantity that a user enters when assessing the fee. For example, you can charge a \$50 licensing fee for day-care facilities that care for up to six children, and charge a \$100 licensing fee for facilities that care for fifteen children.

Formula Equation

X	Fee
0 – R1	F1
R1 – R2	F2
R2 – R3	F3
R3 or more	F4

Input Parameter Format

F1,R1,F2,R2,F3,R3,...Fn,Rn

Example

Labor Camp Fee where

# of Employees	Fee
0-7 (0=<x=<7)	\$0
8-25 (8=<x=<25)	\$135
26-50 (26=<x<50)	\$350
50 or more (50=<x)	\$500

X = number of employees

Formula Parameter: 0,7,135,25,350,50,500

Input Parameter Definitions

F The fixed fee that you want to assess for any quantity that falls within the specified range of values.

R The maximum value within a range of quantities.

X User input.

Conditions

- There is no limit to the number of ranges you can set up for this fee formula, but the total number of characters that you can use to enter input parameters is 500.
- If you set up only one range, the fee is always equal to the fee for that range.

FIXED_FEE_BY_RANGE_ENHANCED Formula

The FIXED FEE BY RANGE ENHANCED formula lets you assess a fixed, or set fee depending on the quantity that a user enters when assessing the fee. This formula calculates fees based upon data in

application specific information. This formula works the same as the FIXED_FEE_BY_RANGE formula, except that it applies only to application specific information.

Formula Equation

\$FI10xxx\$	Fee
1 - R1	F1
R1 – R2	F2
R2 – R3	F3
R3 or more	F4

Input Parameter Format

\$FI10xxx\$,F1,R1,F2,R2,F3,R3,F4

Example

\$FI10100\$	Fee
1 -100	23.20
101-200	34.80
201-300	81.10
301 or more	115.80

X = value of \$FI10100\$

Formula Parameter: \$FI10100\$, 23.20,100,34.80,200,81.10,300,115.80

Input Parameter Definitions

- F The fixed fee that you want to assess for any quantity that falls within the specified range of values.
- R The maximum value within a range of input quantities.

Conditions

- There is no limit to the number of ranges you can set up for this fee formula, but the total number of characters that you can use to enter input parameters is 500.
- If you set up only one range, the fee is always equal to the fee for that range.

FIXED_FEE_BY_RANGE_MULTIPLIER Formula

The FIXED FEE BY RANGE MULTIPLIER formula lets you assess a fixed, or set fee depending on the quantity that a user enters when assessing the fee. This formula calculates fees based on data in application specific information and multiplies the quantity that a user enters by the fee that you specify in the formula.

Formula Equation

\$FI10xxx\$	Fee
1 - R1	F1*X
R1 – R2	F2*X
R2 – R3	F3*X
R3 or more	F4*X

Input Parameter Format

\$FI10xxx\$,F1,R1,F2,R2,F3,R3,F4

Example

Apply residential capital expansion fees based on square feet, where Civic Platform stores measurement for square feet in application specific information. Civic Platform applies fees according to this table.

	Library	Parks	Police	Fire
Up to 700 Sq. Ft.	\$260.00	\$866.00	\$64.00	\$93.00
701-1200 Sq. Ft.	\$368.00	\$1227.00	\$91.00	\$132.00
1201-1700 Sq. Ft.	\$433.00	\$1443.00	\$107.00	\$155.00
1701-2200 Sq. Ft.	\$498.00	\$1659.00	\$123.00	\$128.00
Over 2200 Sq. Ft.	\$606.00	\$2020.00	\$150.00	\$217.00

Sample Use Case: Library Application 1

Square Feet: 700 Quantity Entered when assessing the fee: 1 The total library fee Civic Platform returns with the new fee formula is: $1 * (\$260) = \260

Sample Use Case: Library Application 2

Square Feet: 700 Quantity Entered when assessing the fee: 3 The total library fee Civic Platform returns with the new fee formula is: $3 * (\$260) = \780

Sample Use Case: Library Application 3

Square Feet: 800 Quantity Entered when assessing the fee: 3 The total library fee Civic Platform returns with the new fee formula is: $3 * (\$368) = \1104

Sample Use Case: Library Application 4

Square Feet: 2600 Quantity Entered when assessing the fee: 3 The total library fee Civic Platform returns with the new fee formula is: $3 * (\$606) = \1818

Input Parameter Definitions

- F The fixed fee that you want to assess for any quantity that falls within the specified range of values.
- R The maximum value within a range of input quantities.
- X User input.

Conditions

- There is no limit to the number of ranges you can set up for this fee formula, but the total number of characters that you can use to enter input parameters is 500.
- If you set up only one range, the fee is always equal to the fee for that range multiplied by the user input.

ICBO_BLDG_PERMIT Formula

If your agency sets up standard job values according to the International Conference of Building Officials (ICBO), you can use your valuations to calculate building permit fees. For example, you can determine the fee for all job values between \$1500 and \$20,000.

For each range that you include in the ICBO BLDG PERMIT formula you must determine the maximum job value in that range, the fee factor for that range, and the modular base for that range. You should also determine the minimum fee for a job value within any range. Depending on the ICBO valuations, the ICBO_BLDG_PERMIT formula can calculate fees based on these values.

Formula Equation

If $X \leq R1$ (below Range 1), then Fee = M

If $R1 < X \leq R2$ (Range 1), then Fee = $M + N1 * (\text{mod}(X) \text{ base } B1 - R1) / B1$

Generalized:

If $R_i < X = R_{i+1}$, then $\text{Fee} = M + \text{Sum}(\text{Flower ranges}) + N_i * (\text{mod}(X) \text{ base } B_i - R_i) / B_i$

Out of Range:

If $X > R_{\max}$, then $\text{Fee} = M + \text{Sum}(\text{Flower ranges}) + N_{\max} * \text{mod}(X) \text{ base } B_{\max} - R_{\max} / B_{\max}$

Input Parameter Format

$[M, R_1, N_1, B_1, R_2, N_2, B_2], (R_3, N_3, B_3 \dots, R_{\max}, N_{\max}, B_{\max})$

Where,

M is the minimum fixed fee.

R_i is the range below.

R_{i+1} is the range above.

N_i is the fee factor for range i .

B_i is the modular base for range i .

F_i is the fee for range i .

Example 1

This example illustrates the Building Permit Fees based on the parameter below for Valuations of \$1500 and \$20,000.

Parameter:

(23.50, 500, 3.05, 100, 2000, 14, 1000, 25000, 10.10, 1000, 50000, 7, 1000, 100000, 5.60, 1000, 500000, 4.75, 1000, 1000000, 3.65, 1000, 9999999, 3.65, 1000)

Valuation (X) = \$1500 Fee = \$54.00

Valuation Range	Maximum Fee Equation at this Range	Maximum Fee at this Range	Equation at a Valuation (X) within this Range	Fee at a Valuation within this Range
\$1 - \$500	23.50	\$23.50	23.50	\$23.50
\$500 - \$2000	$(2000 - 500) / 100 * 3.05$	\$45.75	$(X - 500) / 100 * 3.05$ $(1500 - 500) / 100 * 3.05$	\$30.50
SUM			\$23.50 + \$30.50	\$54.00

Valuation (X) = \$20,000 Fee = \$321.25

Valuation Range	Maximum Fee Equation at this Range	Maximum Fee at this Range	Equation at a Valuation (X) within this Range	Fee at a Valuation within this Range
\$1 - \$500	23.50	\$23.50	23.50	\$23.50
\$500 - \$2000	$(2000 - 500) / 100 * 3.05$	\$45.75	$(2000 - 500) / 100 * 3.05$	\$45.75
\$2000 - \$25000	$(25000 - 2000) / 1000 * 14$	\$322.00	$(X - 2000) / 1000 * 14$ $(20000 - 2000) / 1000 * 14$	\$252.00
SUM			\$23.50 + \$45.75 + \$252.00	\$321.25

Example 2

Parameter: (10, 100, 1.5, 10, 200, 1, 20)

If $X = 15$, because $X = R_1$, then $\text{Fee} = M$, therefore $\text{Fee} = 10$.

If $X = 123$, because $R_1 < X = R_2$, then $\text{Fee} = M + \text{Sum}(\text{Flower ranges}) + N_1 * (\text{mod}(X) \text{ base } B_1 - R_1) / B_1$

$\text{Fee} = 10 + 0 + 1.5 * (\text{mod}(123) \text{ base } 10 - 100) / 10$

$\text{Fee} = 10 + 1.5 * (130 - 100) / 10$

Therefore, Fee = 14.5

If $X = 209$, because $X > R_{max}$, then $\text{Fee} = M + \text{Sum(Flower ranges)} + N_2 * \text{mod}(X) \text{ base } B_2 - R_2 / B_2$

$\text{Fee} = M + N_1 * (\text{mod}(R_2) \text{ base } B_1 - R_1) / B_1 + N_2 * \text{mod}(X) \text{ base } B_2 - R_2 / B_2$

$\text{Fee} = 10 + 1.5 * (\text{mod}(200) \text{ base } 10 - 100) / 10 + 1 * (\text{mod}(209) \text{ base } 20 - 200) / 20$

$\text{Fee} = 10 + 1.5 * (200 - 100) / 10 + 1 * (220 - 200) / 20$

$\text{Fee} = 10 + 15 + 1$

Therefore, Fee = 26

If $X = 451$, because $X > R_{max}$, then $\text{Fee} = M + \text{Sum(Flower ranges)} + N_2 * \text{mod}(X) \text{ base } B_2 - R_2 / B_2$

$\text{Fee} = M + N_1 * (\text{mod}(R_2) \text{ base } B_1 - R_1) / B_1 + N_2 * \text{mod}(X) \text{ base } B_2 - R_2 / B_2$

$\text{Fee} = 10 + 1.5 * (\text{mod}(200) \text{ base } 10 - 100) / 10 + 1 * (\text{mod}(451) \text{ base } 20 - 200) / 20$

$\text{Fee} = 10 + 1.5 * (200 - 100) / 10 + 1 * (460 - 200) / 20$

$\text{Fee} = 10 + 15 + 13$

Therefore, Fee = 38

Example 3

Parameter: 10, 100, 1.5, 10, 200, 1, 20, 1000, 3, 100

If $X = 451$, because $R_2 < X \leq R_3$, then $\text{Fee} = M + \text{Sum(Flower ranges)} + N_2 * \text{mod}(X) \text{ base } B_2 - R_2 / B_2$

$\text{Fee} = M + N_1 * (\text{mod}(R_2) \text{ base } B_1 - R_1) / B_1 + N_2 * \text{mod}(X) \text{ base } B_2 - R_2 / B_2$

$\text{Fee} = 10 + 1.5 * (\text{mod}(200) \text{ base } 10 - 100) / 10 + 1 * (\text{mod}(451) \text{ base } 20 - 200) / 20$

$\text{Fee} = 10 + 1.5 * (200 - 100) / 10 + 1 * (460 - 200) / 20$

$\text{Fee} = 10 + 15 + 13$

Therefore, Fee = 38

If $X = 1550$, because $X > R_{max}$, then $\text{Fee} = M + \text{Sum(Flower ranges)} + N_3 * \text{mod}(X) \text{ base } B_3 - R_3 / B_3$

$\text{Fee} = M + N_1 * (\text{mod}(R_2) \text{ base } B_1 - R_2) / B_2 + N_2 * \text{mod}(R_3) \text{ base } B_2 - R_2 / B_2 + N_3 * (\text{mod}(X) \text{ base } B_3 - R_3) / B_3$

$\text{Fee} = 10 + 1.5 * (\text{mod}(200) \text{ base } 10 - 100) / 10 + 1 * (\text{mod}(1000) \text{ base } 20 - 200) / 20 + 3 * (\text{mod}(1550) \text{ base } 100 - 1000) / 100$

$\text{Fee} = 10 + 1.5 * (200 - 100) / 10 + 1 * (1000 - 200) / 20 + 3 * (1600 - 1000) / 100$

$\text{Fee} = 10 + 15 + 40 + 18$

Therefore, Fee = 83

Input Parameter Definitions

M The minimum fee for any job value; a fixed fee for job values within your first range of job values.

R The maximum value within a range of job values.

N The fee factor used to multiply the range a job values.

B The modular base of the job value. The modular base determines how Civic Platform rounds off a job value, such as the nearest tenth.

Conditions

- There is no limit to the number of ranges you can set up for this fee formula, but the total number of characters that you can use to enter input parameters is 500.
- If you set up only one range of job values, the fee is equal to the minimum fixed fee (M).
- If you configure multiple ranges up to R_n , the fee includes the sum of the minimum fee and the maximum fee for all other ranges up to and including R_{n-1} .
- For an ICBO 1997 Administrative Code Building Permit Fee, use these parameters:
23.5,500.3.05,100,2000,14,1000,25000,10.1,1000,50000,7,1000, 100000,
5.6,1000,500000,4.75,1000,1000000,3.65,1000

ICBO_STYLE Formula

The ICBO STYLE formula is similar to the ICBO_BLDG_PERMIT formula in that it lets you configure fee formulas for a range of values. Instead of calculating fees based on job values, the ICBO_STYLE formula bases fees on the quantity that users enter when assessing fees.

For each range that you include in the ICBO_STYLE formula you must determine the maximum quantity in that range, the fee factor for that range, and the modular base for that range. You should also determine the minimum fee for any within any range. The fee for each quantity that falls within a pre-defined range is dependent on the sum of fees for all previous ranges.

Input Parameter Format

M,R1,N1,B1,R2,N2,B2,R3,N3,B3,...Rn,Nn,Bn

Where,

M is the minimum fixed fee.

Ri is the range below.

Ri+1 is the range above.

Ni is the fee factor for range i.

Bi is the modular base for range i.

Fi is the fee for range i.

Example

A Client requires a fee formula with a changing base fee plus a sliding percentage over a defined range of inputs. Such as:

\$1001 - \$5000	= \$80.00 + 3% of excess over \$1000.00
\$5001 - \$10,000	= \$250.00 + 2% of excess over \$5000.00
\$10,001 - \$25,000	= \$350.00 + 1% of excess over \$10,000.00
\$25,001 and Over	= \$520.00 + 3/4% of excess over \$25,000.00

You must break down this fee schedule into four individual formulas, one for each range.

Parameters:

Formula1 = (80,1000,.03,1,5000,0,0) for the \$1001 - \$5000 range

Formula2 = (250,5000,.02,1,10000,0,0) for the \$5001 - \$10,000 range

Formula3 = (350,10000,.01,1,25000,0,0) for the \$10,001 - \$25,000 range

Formula4 = (520,25000,.0075,1,999999,0,0) for the over \$25,000 range

If X=2000, the user must enter X into Formula1, because R1 < X = R2, then

Fee = M + N1 * (mod(X) base B1 – R1) / B1

Fee = 80 + .03 * (mod(2000) base 1 – 1000) / 1

Fee = 80 + .03 * (2000 – 1000) / 1

Fee = 80 + .03 * 1000

Fee = 80 + 30

Therefore, Fee = 110

If X= \$30,000, the user must enter X into Formula4, because R1 < X = R2, then

Fee = M + N1 * (mod(X) base B1 – R1) / B1

Fee = 520 + .0075 * (mod(30000) base 1 – 25000) / 1

Fee = 520 + .0075 * (30000 – 25000) / 1

Fee = 520 + .0075 * 5000

Fee = 520 + 37.5

Therefore, Fee = 557.5

Input Parameter Definitions

- M The minimum fee for any job value; a fixed fee for job values within your first range of job values.
- R The maximum value within a range of quantities. For example, if you want to configure fees for a range of quantities between 0 and 500, enter 500.
- N The fee factor used to multiply the user input. For example, if in addition to the minimum fee you want to charge 3% of the total quantity, enter .03.
- B The modular base of the job value. The modular base determines how Civic Platform rounds off a user input value, such as to the nearest tenth.
- X User input.

Conditions

- If you want to set up a fee formula with a changing minimum fee for each range of quantities, you must set up individual fee items for each range. Each fee item can use only one formula. When you create the fee item, make sure you enter the input parameters and choose the formula that is appropriate for the range you want to set up.
- There is no limit to the number of ranges you can set up for this fee formula, but the total number of characters that you can use to enter input parameters is 500.
- If you set up only one range of job values, the fee is equal to the minimum fixes fee (M).
- If you configure multiple ranges up to Rn, the fee includes the sum of the minimum fee and the maximum fee for all other ranges up to and including Rn-1.

ICBO_STYLE_ENHANCED Formula

The ICBO STYLE ENHANCED formula is similar to the ICBO_STYLE which lets you set up unique fees for a range of values that a user enters. The user input used in this formula is the quantity that a user enters when assessing the fee. Each range of quantities can have a unique minimum fee, a unique modular base, and a unique fee factor.

Unlike the ICBO_STYLE formula, you do not need to set up an individual formula with unique input parameters for each range. You can include the minimum value, the modular base, and the fee factor for each range within a single set of input parameters. The fee calculated is not dependent on any other range values.

Formula Equation

If $X \leq R1$ (below Range 1), then $\text{Fee} = M0 + N0 * \text{Ceiling}(X - R0)$ base B0

If $R1 < X \leq R2$ (Range 1), then $\text{Fee} = M1 + N1 * \text{Ceiling}(X - R1)$ base B1

Generalized:

If $Ri < X \leq Ri+1$, then $\text{Fee} = Mi + Ni * \text{Ceiling}(X - Ri)$ base Bi

Out of Range:

If $X > Rmax$, then $\text{Fee} = Mmax + Nmax * \text{Ceiling}(X - Rmax)$ base Bmax

Input Parameter Format

M0,N0,B0,R1,M1,N1,B1, (R2,M2,N2,B2, (R3,M3,N3,B3,...Rn,Mn,Nn,Bn))

Where,

Mi is the base fee.

Ni is the fee factor for range i.

B_i is the modular base for range i .

R_{i+1} is the range above ($R_0 = \text{Civic Platform assumes 0 for the low end}$).

F_i is the fee for range i .

Example

A Client requires a fee formula with a changing base fee plus a sliding percentage over a defined range of inputs. Such as:

\$1001 - \$5000	= \$80.00 + 3% of excess over \$1000.00 per 100 unit increment
\$5001 - \$10,000	= \$250.00 + 2% of excess over \$5000.00 per 500 unit increment
\$10,001 - \$25,000	= \$350.00 + 1% of excess over \$10,000.00 per 1000 unit increment
\$25,001 and Over	= \$520.00 + 3/4% of excess over \$25,000.00 per 1000 unit increment

Parameters:

(0,0,1,1000,80,.03,100,5000,250,.02,500,10000,350,.01,1000,25000,520,.0075,1000)

If $X=500$, not in the range

$\text{Fee} = 0 + 0^*(x-0)/1 = 0$

If $X=2050$, first range

$\text{Fee} = M_1 + N_1 * \text{Ceiling}(X - R_1) \text{ base } B_1$

$\text{Fee} = 80 + .03 * \text{Ceiling}(2000 - 1000) / 100$

$\text{Fee} = 80 + .03 * 11$

$\text{Fee} = 80 + 3.3$

Therefore, $\text{Fee} = 83.3$

If $X= \$30,000$

$\text{Fee} = M + N_1 * \text{Ceiling}(X - R_1) \text{ base } B_{\max}$

$\text{Fee} = 520 + .0075 * \text{Ceiling}(30000 - 25000) / 1000$

$\text{Fee} = 520 + .0075 * 5$

$\text{Fee} = 520 + 0.038$

Therefore, $\text{Fee} = 520.04$

Input Parameter Definitions

- M The minimum fee for any job value within a range.
- R The minimum value within a range of job values. For example, if you want to configure fees for a range of job values between \$1000 and \$5000, enter 5000.
- N The fee factor used to multiply the range a job values. For example, if in addition to the minimum fee you want to charge 3% of the job value, enter, enter .03.
- B The modular base of the job value. The modular base determines how Civic Platform rounds off a job value, such as to the nearest tenth.
- X User input.

Conditions

- There is no limit to the number of ranges you can set up for this fee formula, but the total number of characters that you can use to enter input parameters is 500.
- Any modular base (B in this formula) cannot equal zero and must be greater than one.

LINEAR_MIN_MAX_RANGE_PARAM Formula

The LINEAR MIN MAX RANGE PARAM formula is a range formula. Range formulas let you set up unique parameters depending on the range in which the user input or the job values belong. For example, you can set up a minimum fee for job values less than \$5000 that is different than the minimum fee for job values greater than \$5000.

The LINEAR_MIN_MAX_RANGE_PARAM formula is a unique formula. This formula enables you to calculate fees based on user input as well as standard job values. This formula calculates fees based on job values or the value from a specific information field on an application. With a fee indicator, you determine what value you want to use when you set up the fee item. You can use a unique fee indicator for each specific information value or job value that you set up.

For example, if you set up a specific information field for an application to collect the total value of employee salaries, you can configure fees based on the value that a user enters. When you add a field to a specific information group, you assign a fee indicator to it. When you set up a fee item based on the specific information value, you must use the same fee indicator as an input parameter.

Formula Equation

$\$FI10100\$ * a / B$

Input Parameter Format

$\$Fixxxx$,a1,B1,m1,M1,R1,a2,B2,m2,M2,R2,...an,Bn,mn,Mn,Rn$

Example

$\$FI10100$,0.15,1000,30,150,200000,0.15,1000,30,150,1000000,0.15,1000,30,150,999999999.$

Gross Receipt (in Additional Information, $\$FI10100\$$) is \$210,000. The user enters 1 unit for the Business License Fee. Civic Platform calculates the fee as $\$210,000 * 0.15 / 1000 = \31.50

Input Parameter Definitions

- F_i The fee indicator is a five-digit number between 10100 and 10599. Civic Platform uses the indicator to identify a job value, or a specific information value from an application.
- a The fee factor used to multiply the job value or the specific information value. For example, if you want to assess a fee based on 15% of an annual salary value, enter .15.
- B The modular base of the job value or the specific information value. The modular base determines how Civic Platform rounds off a job value, such as to the nearest tenth or hundredth.
- m The minimum fee that you want to assess for any value that falls in a specific range.
- M The maximum fee that you want to assess for any value that falls in a specific range.
- R The maximum value within a range of values. For example, if you want to set up input parameters for values that are less than \$4000, enter 4000.

Conditions

- There is no limit to the number of ranges you can set up for this fee formula, but the total number of characters that you can use to enter input parameters is 500.
- A fee indicator must be a five-digit number between 10100 and 10599.

LINEAR_MIN_MAX_VALUATION Formula

The LINEAR MIN MAX VALUATION formula does not accommodate value ranges. Using this formula you can configure fees that increase based on a job valuation or a unit price. You can also determine the

minimum fee and maximum fee for any fee item that uses this formula. For example, you can set up a plan review fee that is 65% of the total valuation, at least \$10.00, but not more than \$1000.00.

This formula takes into account user input: the quantity that the user enters when assessing the fee. For example, if a user assesses a fee for 1000 square feet, and the unit price for each square foot is \$0.44, then the quantity of 1000 is multiplied with the unit price to calculate the fee. The quantity for a fee item based on a valuation is typically 1. For example, if a user is assessing a fee for a plan review and Civic Platform calculates the fee item based on the total job value, the user enters "1" to indicate that one plan review is complete.

Formula Equation

c,a,b,min,max or \$FI00003\$,a,b,min,max or a*\$FI00003\$ * X + b

Input Parameter Format

c,a,b,m,M

Example 1

Pool Heater Fee of \$15 per pool heater.

X = number of pool heaters

Formula Parameter: \$FI00003\$,15,0,0,999999

Example 2

Electrical Base Fee of \$25.00

X = 1

Formula Parameter: 0,25,25,25

Example 3

Inspection Fee of \$80 per hour with a minimum of ½ hour.

X = number of hours

Formula Parameter: 80,0,40,999999

Example 4

A Plan Review Fee of 65% of the total Valuation.

X=1

Formula Parameter: \$FI00003\$,0.65,0,999999

Formula Calculation: The Valuation = \$40,000.00

When you enter X = 1, the fee is then $40000 * 0.65 * 1 + 0 = 26,000.00$

Example 5

A Police Impact Fee of \$0.44/sq.ft. plus a base fee of \$10.00.

X=2000 (enter in Sq. Ft.)

Formula Parameter: 0.44,1,10,0,999999

Formula Calculation:

If X = 2000 (or 2000 square feet), Fee = $(0.44)(1)(2000) + 10 = \$890.00$

Input Parameter Definitions

- c The unit price or the fee indicator of a valuation. A fee indicator is a five-digit number between 10100 and 10599 that identifies a standard valuation or the value of a specific information field on an application.
- a The fee factor used to multiply the unit price or job value. For example, if you want to assess a fee of 65% of the total valuation, enter .65.
- b The base fee that you want to add to the product of C and A. For example, if you want to add a base fee of \$10.00 to any fee, enter 10.
- m The minimum fee that you want to assess regardless of user input.
- M The maximum fee that you want to assess regardless of user input.
- X User input.

Conditions

A fee indicator must be a five-digit number between 10100 and 10599.

LINEAR_WITH_MIN_MAX Formula

The LINEAR WITH MIN MAX formula is the simplest fee formula. This formula does not account for value ranges, and you cannot use valuations with this formula. This formula calculates a fee based on the product of the quantity that a user enters when assessing a fee and the unit price. For example, if the unit price for a single pool heater is \$15.00, the fee for two heaters is \$30.00.

Formula Equation

$$a * X + b$$

Input Parameter Format

a,b,m,M

Example 1

Pool Heater Fee of \$15 per pool heater.

X = number of pool heaters

Formula Parameter: 15,0,0,999999

So, if X = 5 heaters à Fee = $5 * 15 = \$75$

Example 2

Electrical Base Fee of \$25.00

X = 1

Formula Parameter: 0,25,25,25

So, if X = 1 à Fee = \$25

Example 3

Inspection Fee of \$80 per hour with a minimum of ½ hour.

X = number of hours

Formula Parameter: 80,0,40,999999

So, if X = 5 hours à Fee = $5 * 80 = \$400$

So, if X = 0.25 hours (or 15 min.) à Fee = \$40 (because $0.25 * 80 = \$20$, which is less than \$40, the minimum fee.)

Input Parameter Definitions

- a The unit price. For example, if you want to assess a fee of \$15.00 for a single pool heater, enter 15.
- b The base fee that you want to add to the product of "a" and the quantity that a user enters when assessing the fee. For example, if you want to charge a base fee of 25.00 for any electrical work, enter 25.
- m The minimum fee that you want to assess regardless of user input.
- M The maximum fee that you want to assess regardless of user input.
- X User input.

LINEAR_WITH_MIN_MAX_ENHANCED Formula

The LINEAR WITH MIN MAX ENHANCED formula is similar to the LINEAR_WITH_MIX_MAX formula in that you cannot use valuations. This formula calculates fees based only on the quantity that a user enters

when assessing a fee. You can however, set up input parameters for multiple ranges of quantities. For example, you can assess a design review fee of \$350 per house unit, and \$150 per house unit after 15 units.

Formula Equation

$$ai * (X - Ri) + bi$$

X	Fee
0 - R1	$a * (X) + b$
R1 - R2	$a1 * (X - R1) + b1$
R2 - R3	$a2 * (X - R2) + b2$
R3 or more	$a3 * (X - R3) + b3$

This formula assumes the initial range begins with zero. You can enter the minimum value only for subsequent ranges. For example, if you want an initial range of 0-5, enter "5" as the R1 input parameter.

Input Parameter Format

a,b,m,M,R1,a1,b1,m1,M1,R2,a2,b2,m2,M2,...Rn,an,bn,mn,Mn

Example 1

Design Review Fee (\$350 per house unit, \$150 per house unit after 15 units)

X	Fee
0 - 15	$350 * X + 0$
15 or more	$150 * (X - 15) + 5250$

X = number of house units

Formula Parameter: 350,0,0,9999999,15,150,5250,0,9999999

Formula Calculation:

So, if X = 10 house units, then Fee = $350 * 10 + 0 = \$3500$.

So, if X = 20 house units, then Fee = $150 * (20 - 15) + 5250 = \6000 .

Example 2

A Day Care Operation Fee:

x	Fee
0 - 6	$35 * X + 0$
7 -12	$50 * (X - 12) + 50$
12 or more	$50 * (X - 12) + 50$

When the number of children is less than 6, fee = \$35.00

When the number of children is between 7 and 12, fee = \$50.00

When the number of children is greater than 12, fee = $\$50.00 + (X - 12) * 2$

X = number of children

Formula Parameter: 0,35,0,999999,6,0,50,0,999999,12,2,50,50,999999

Formula Calculation:

So if X = 5 Children, then Fee = $35 * 5 + 0 = \$175.00$

So if X = 10 Children, then Fee = $50 * (10 - 12) = \$500.00$

Input Parameter Definitions

- a The unit price. For example, if you want to assess a fee of \$15.00 for a single pool heater, enter 15.
- b The base fee that you want to add to the product of "a" and the quantity that a user enters when assessing the fee. For example, if you want to charge a base fee of 25.00 for any electrical work, enter 25.
- m The minimum fee that you want to assess regardless of user input.

M	The maximum fee that you want to assess regardless of user input.
R	The minimum quantity within a range of quantities. For example, if you want to assess a unique fee for quantities greater than or equal to 5, but less than 15, enter "5" for R1 and "15" for R2.
X	User input.

MIN_FEE_ADD_ON Formula

The MIN FEE ADD ON formula lets you assess a fee on top of the sum of all other fees Civic Platform assesses on an application. For example, if the sum of all assessed fees is \$35.00 and you want to always charge a minimum fee of \$50.00, the MIN_FEE_ADD_ON formula makes up the difference of \$15.00.

You can set up a minimum parameter so that the total sum of all assessed fees never falls below the minimum. You can also determine a base fee that you want to add onto the minimum fee. If the sum of all assessed fees is above the minimum fee, the MIN_FEE_ADD_ON formula does not affect the fee balance in any way.

Civic Platform calculates a subtotal of the fees, minus the MIN_FEE_ADD_ON fee, and compares the subtotal to the min parameter. If the subtotal is less than the min parameter, then Civic Platform enters a value in the MIN_FEE_ADD_ON fee so that the total (including the MIN_FEE_ADD_ON fee) equals to the min parameter. If the subtotal is greater than or equals to the min parameter, then Civic Platform enters zero in the MIN_FEE_ADD_ON fee.

Input Parameter Format

a,b,min,max

Example

1,0,50,99999999

There are two fees: Electrical fee of \$35, and Planning Review fee of \$10.

The subtotal is $\$35 + \$10 = \$45$, which is less than 50.

The user enter 1 unit for MIN_FEE_ADD_ON fee. Civic Platform enters \$5 to this MIN_FEE_ADD_ON fee. The total fee then is \$50.

Input Parameter Definitions

a	The fee factor used to multiply the subgroup total.
b	The base fee that you want to assess in addition to any minimum fee.
min	The minimum fee that you want to assess independent of the total sum of all fee items Civic Platform already assessed.
max	The maximum fee that you want to assess

MIN_FEE_ADD_ON_FEESCHEDULE Formula

The MIN FEE ADD ON FEESCHEDULE formula lets you assess a fee on top of the sum of all other fees Civic Platform has assessed for a fee schedule. For example, if the sum of all assessed fees in a particular fee schedule is \$35.00 and you want to always charge a minimum fee of \$50.00, the MIN_FEE_ADD_ON_FEESCHEDULE formula makes up the difference of \$15.00.

You can set up a minimum parameter so that the total sum of all assessed fees on a fee schedule never falls below the minimum. You can also determine a base fee that you want to add onto the minimum fee. If the sum of all assessed fees falls above the minimum fee, the MIN_FEE_ADD_ON_FEESCHEDULE formula does not affect the fee balance in any way.

This fee calculation has nothing to do with the Sub Group fee items calculation. You cannot include a minimum fee in a sub group because Civic Platform calculates the fee items after it calculates the sub group fee items.

Input Parameter Format

a,b,min,max

Example

1,0,60,99999999

There are two fees: Electrical fee of \$35 (Fee schedule = ELE03), and Mechanical Base fee of \$10 (Fee schedule = MECH03).

Because this fee formula calculates minimum fee based on Fee schedule,

Electrical fee is \$35, which is less than \$60 (for ELE03 fee schedule)

System adds the Electrical Min fee as $\$60 - \$35 = \$25$

Mechanical Base fee is \$35, which is less than \$60 (for MECH03 fee schedule)

System adds the Mechanical Min fee as $\$60 - \$10 = \$50$

There are 4 fee items for this application

Electrical fee = \$35

Electrical Min fee = \$25

Mechanical Base fee = \$10

Mechanical Min fee = \$50

The total fee for this application is \$120

ELE03 Min Fee Add On \$25 and it is the same way for MECH03 fee schedule.

Note that this \$25 is the \$60 minimum fee ($\$60 - \$35 = \$25$) for fee schedule ELE03. This calculation ensures that the total fees are at least \$60.

Input Parameter Definitions

- a The fee factor used to multiply the subgroup total.
- b The base fee that you want to assess in addition to any minimum fee.
- min The minimum fee that you want to assess independent of the total sum of all fee items Civic Platform has assessed already.
- max The maximum fee that you want to assess

PENALTY Formula

The PENALTY formula is similar to the MIN_FEE_ADD_ON formula, which lets you assess a penalty fee based on the total outstanding balance of new and invoiced fees added prior to the fee item with the PENALTY formula. For example, if the sum of all unpaid fees exceeds \$3000, you can assess a penalty fee of \$10.00 for every \$1000 over a certain limit.

A unique feature of the PENALTY formula is that it figures user input in the equation. The user input referenced is the quantity that a user enters when assessing the penalty fee. You can set up the PENALTY formula with minimum fees and maximum fees. Civic Platform forces any penalty fee that falls below this range to the minimum fee. Civic Platform forces any fee that falls above this range to the maximum fee that you determine.

Civic Platform calculates the PENALTY formula as follows: Total fee assessed * X * (a/100) + b

Input Parameter Format

a,b,min,max

Example 1

10,5,50,9999

Total fees assessed is \$100. The penalty fee calculation is:

X = 1

Penalty fee = $\$100 * 1 * (10 / 100) + 5 = \15.00

Because the penalty fee of \$15.00 is less than minimum fee amount, which is \$50, the penalty fee is \$50.00

Example 2

20,100,50,99999

Total fee assessed is \$100. The penalty fee calculation is:

X = 1

Penalty fee = $\$100 * 1 * (20 / 100) + 100 = \120.00

Because the penalty fee of \$120.00 is more than the minimum fee amount of \$50 and less than the maximum fee amount of \$99999, the penalty fee calculates to \$120.00.

Input Parameter Definitions

- a The percentage, or fee factor that you want to multiply with the total sum of all assessed fees. Enter a percentage value that is NOT in the form of a decimal. For example, if you want to assess a penalty fee that is 20% of the sum of all assessed fees, enter 20. Civic Platform divides this value by 100 in the fee formula resolve "20" to a percentage (20/100).
- b The base fee that you want to add to the product of "a," the quantity that a user enters, and the total sum of all assessed fees.
- min The minimum penalty fee that you want to assess.
- max The maximum penalty that you want to assess.
- X The user enters the X parameter.

SG-LINEAR_WITH_MIN_MAX Formula

The SG-LINEAR WITH MIN MAX formula is similar to the MIN_FEE_ADD_ON formula, which lets you assess a fee based on other fees. This formula is unique, as it lets you assess a fee based on a subgroup of assessed fees, rather than the total sum of all assessed fees.

After you assess a group of fees, you can assess an additional fee that belongs to a certain subgroup, based on the sum of all the fees that belong to the same subgroup within the same fee schedule.

Subgroups are similar to fee indicators, which Civic Platform uses to identify a single valuation; however, you can include multiple fee items in a single subgroup. When you configure fee items, you have the option to associate each fee with a unique subgroup.

Civic Platform sums up all the fees in this subgroup, then takes the subtotal, multiplies it by a, and adds b to it.

Input Parameter Format

a,b,min,max

Example

10,50,0,99999

There are two fees: Electrical fee of \$35, and Planning Review fee of \$10.

The SUBGROUP subtotal is $\$35 + \$10 = \$45$.

Civic Platform calculates as $\$45 * 10 + 50 = \500 .

Input Parameter Definitions

- a The fee factor used to multiply the subgroup total. For example, if you want to assess a fee that is 65% of the subgroup sum, enter 65.

- b The base fee that you want to assess in addition to any minimum fee.
- min The minimum fee that you want to assess, independent of the total sum of all fee items previously assessed.
- max The maximum fee that you want to assess.

SG-PERCENTAGE Formula

The SG-PERCENTAGE formula lets you assess the fee of a fee item based on the sum of other fees that belong to the same subgroup as the fee item.

Similar to fee indicators, which Civic Platform uses to identify a single valuation, subgroups let you identify multiple valuations for all fee items with the same subgroup. When you configure fee items, you have the option to associate each fee with a unique subgroup. To include additional fee items in the same subgroup, you must use the same subgroup code for each fee item you want to include in the subgroup.

Input Parameter Format

a

Example

75

There are four fees in the same subgroup SUBGROUP75: Electrical fee of \$35, Planning Review fee of \$10, Checking fee of \$40, and Building Permit fee of the SG-PERCENTAGE formula, and with 75 as its calc variable.

After you add the Electrical fee, Planning fee, and Building Permit fee (quantity: 1) to a record,

The Building Permit fee = $(\$35 + \$10) * 75\% = \$33.75$.

After you invoice the Electrical fee, if the Standard Choice SG-PERCENTAGE_EXCLUDE_INVOICED_FEE is Yes,

The Building Permit fee = $\$10 * 75\% = \7.50 .

And if you invoice the Building Permit fee, and add the Checking fee to the record, if the Standard Choice SG-PERCENTAGE_EXCLUDE_INVOICED_FEE is Yes,

The Building Permit fee = $\$7.50$.

Input Parameter Definitions

- a The percentage point which you want to multiply with the subgroup total. For example, if you want to assess a fee that is 75% of the subgroup sum, enter 75.

Conditions

- You can configure the Standard Choice SG-PERCENTAGE_EXCLUDE_INVOICED_FEE to determine whether to include the fees of all the other fee items in the sum, or only the fees of the fee items that are of the New status. Note that if the Standard Choice SG-PERCENTAGE_EXCLUDE_INVOICED_FEE is Yes, when users recalculate the fees in a record, and the fee item of the SG-PERCENTAGE formula has an “Invoiced” status, the recalculation does not change the value of the fee item.
- Any subtotal that you calculate using the SG-PERCENTAGE formula cannot include fee items that Civic Platform calculates using the SG-LINEAR_WITH_MIN_MAX formula. This formula is already a subtotal of other fee items.
- When a user assesses a SG-PERCENTAGE fee, it appears at the bottom of the list of assessed fees. Because this fee involves sub-totaling other fees, Civic Platform assumes this fee is the final fee in a list of fees.

- If a fee item uses the SG-PERCENTAGE formula, and its “Assess Adjustment on Recalculation” is Yes in the Fee Item – Edit page in Classic Administration, if the fee item already exists in a record, users cannot add the fee item again unless the existing item status is VOIDED.

Invoices and Payment Periods

This section addresses the administrative setup for invoices and payment periods.

Payment periods act as a flag for batch processing for invoicing customers so that the agency knows what application fees to bill to a customer and when. An agency can control who can remove fees from a submitted or partial application.

Click a topic title below for full details.

Related Information

[Managing Payment Periods](#)

[Configuring Invoicing Options](#)

Managing Payment Periods

Topics

- [Configuring Payment Periods](#)
- [Adding a Payment Period](#)
- [Searching for a Payment Period](#)
- [Editing a Payment Period](#)

Configuring Payment Periods

See *Accela Civic Platform Configuration Reference*.

Adding a Payment Period

As necessary, you can add new payment periods to Civic Platform. When you add a payment period, you can choose the order in which you want payment periods to display within a fee schedule. When a user assesses a fee, payment periods with a lower display order appear first in the list.

To add a payment period

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Payment Period**.
3. Click **Add**.
4. Complete these fields:

Payment Period	Enter a unique name to identify the payment period. For example, enter "Final" to identify a payment period that occurs at the end of the application process.
Display Order	Enter a number to determine the position of the payment period within a list of payment periods. For example, if you want the period to display before any other periods, enter 1.
Status	If you want to make the payment period available to users in Civic Platform, select Active ; otherwise, select Inactive .
5. Click **Save**.

Searching for a Payment Period

If you want to edit an existing payment period, you first need to search for the period in your database. You can also search for a payment to view details about the payment period without necessarily editing it. You can search for a payment period based on the payment period name and status.

To see a list of all payment periods, click **Submit** without entering details about an individual period.

To search for a payment period

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Payment Period**.
3. Complete these fields:

Payment Period	Enter the name of the payment period for which you are searching.
Record Status	Choose the payment period you want to find. You can search for enabled or disabled items.
4. To see a list of all payment periods, click **Submit** without entering details about a period.
5. Click **Submit**.
6. If Civic Platform displays a list of options, click the option that you want.

Editing a Payment Period

You can change the display order or the status of any pay period.

To edit a payment period

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Payment Period**.
3. Search for the payment period that you want.
4. Update these fields:

Display Order	Enter a number to determine the position of the payment period within a list of payment periods. For example, if you want the period to display before any other periods, enter 1.
Status	If you want to make the payment period available to users in Civic Platform, select Active ; otherwise, Select Inactive .
5. Click **Save**.

Configuring Invoicing Options

See *Accela Civic Platform Configuration Reference*.

Trust Accounts

This section introduces the Trust Account portlet, its functionality, and the required administrative setup tasks.

To use trust accounts in Citizen Access, you must configure trust accounts in both Civic Platform (as described in this section), and in Citizen Access. The setup of trust accounts for registered public users in Citizen Access is in the “Trust Accounts” section of the *Citizen Access Administrator Guide*.

Click a topic title below for full details.

Related Information

[Configuring Trust Account Functionality](#)

[Managing Trust Account Transactions](#)

[Viewing and Printing Trust Account Reports](#)

Configuring Trust Account Functionality

Civic Platform allows you to maintain the trust accounts in your agency. You can create a new account, edit information about an existing account, or close an account that is no longer needed. Use this section to customize the receipt summary and email notifications when the trust account balance is below a defined threshold amount. Maintaining your trust accounts helps to keep the trust account information accurate and current.

Topics

- [Enabling Trust Account Email Notifications](#)
- [Enabling Receipt Summaries and Hyperlink Receipt IDs](#)
- [Customizing the Content of Trust Account Notifications](#)
- [Associating Addresses with a Trust Account](#)
- [Searching for a Trust Account](#)
- [Creating a Trust Account](#)
- [Editing a Trust Account](#)
- [Removing Associated Addresses from a Trust Account](#)
- [Associating Parcels with a Trust Account](#)
- [Removing Associated Parcels from a Trust Account](#)
- [Associating People with a Trust Account](#)
- [Removing Associated People from a Trust Account](#)
- [Viewing Associated Records for a Trust Account](#)
- [Closing a Trust Account](#)
- [Automating Trust Accounts](#)

Enabling Trust Account Email Notifications

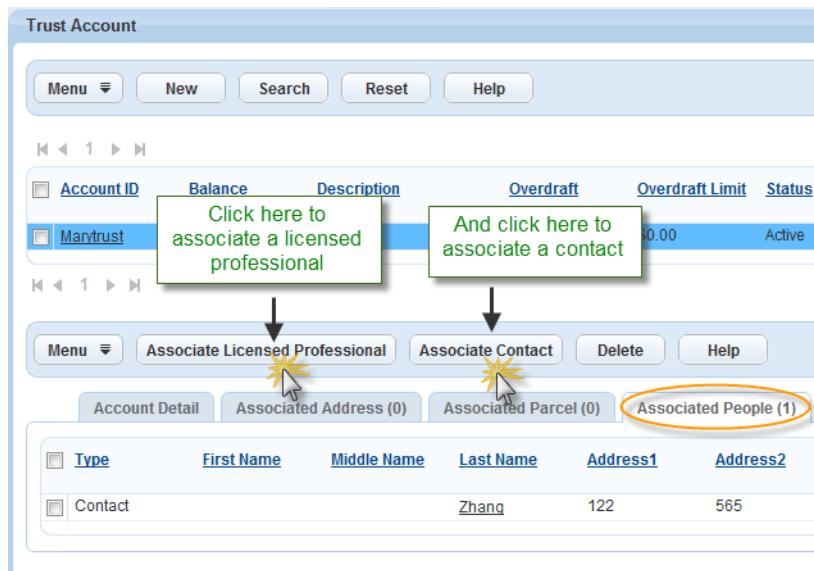
When the balance of a trust account is less than the threshold amount you defined in the trust account, Civic Platform can send a low balance email notification to the trust account administrator and to other contacts, as described below. To enable email notifications you must configure email addresses in four places in Civic Platform, as described below.

To enable trust account email notifications

1. Configure the email credentials of your preferred “Sent From” email account in the ServerConfig.properties file on your av.biz server. For complete details, refer to the Accela Civic Platform Installation Guide and follow the instructions in the section, “Configuring “Sent From” Email Address for Trust Account Notifications.”
2. Configure the name and email address of the recipient(s) of trust account email notification(s) in the following places in Civic Platform. You can have up to three recipient types, as described below:
 - a. To send email notifications to the citizen responsible for this trust account, configure the standard choice TRUST_ACCOUNT_ADMINISTRATOR to include their name and email address. See the Civic Platform Configuration Reference for complete details.
 - b. To send email notifications to an Accela user, configure their email address in their user profile in Civic Platform (Classic Admin > Tools > User Profile > User). Then select that user profile in the “Assigned to Staff” setting of a record associated with the trust account, as illustrated here:

The screenshot shows two overlapping Civic Platform screens. The top screen is a 'Building Permit' application with fields like Case # (MPCR2012-00001), Application Name (Vineyard Point - Plan 233.2308 KB Homes), and Description (4 bedrooms plus loft, two story home). A green box highlights the 'Assigned to Staff' dropdown under the 'Current Department' section, which is set to 'Accela Administration'. The bottom screen is the 'User Profile' edit screen for a user named 'User'. It shows fields for User Login ID (ADMIN), New Password, Confirm Password, Distinguished Name, User Name (First: Admin, Middle: Mi, Last: Admin), Initials (AA), Display Initials in ACA (checked), Title (SYSTEM), Employee ID (ADMIN), and Email (trancy.zhai@achieveo.com). A green box highlights the 'Email' field.

- c. To send email notifications to a licenced professional and/or a contact, configure the Associated People in the Trust Accounts portlet by choosing the Licensed Professional and/or Contact to whom you want to send email notifications. Search for an existing licenced professional and/or contact, then select it. If the licenced professional and/or contact does not already exist you must first create it and then select it here.



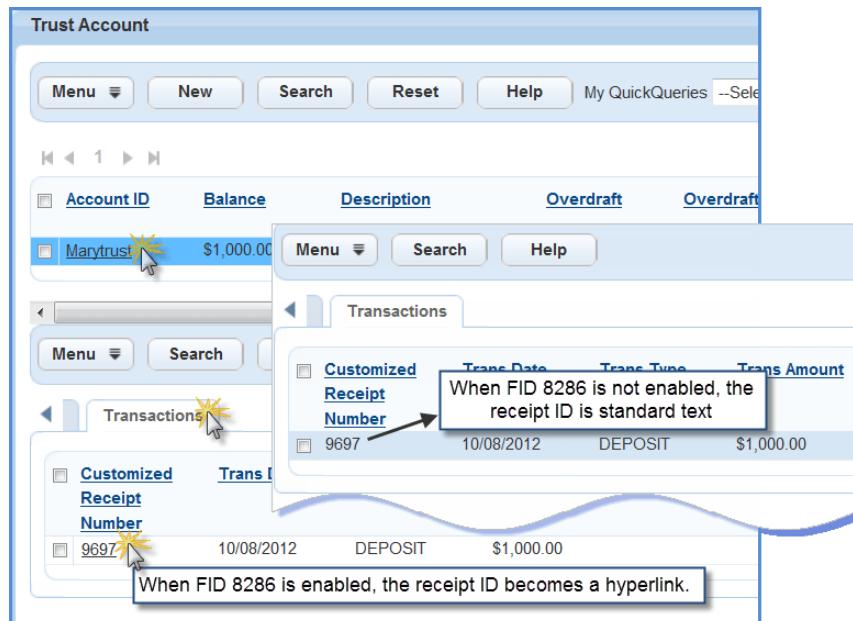
Enabling Receipt Summaries and Hyperlink Receipt IDs

To enable customized receipt summaries and hyperlink receipt IDs

1. Enable full access to FID 8286: Fees Print Receipt Summary. Enabling this FID does two things: it enables customized receipt summaries, and it transforms the receipt ID field on the Transactions tab of the Trust Account portlet from static text to a hyperlink (shown in the sample screen below), giving users easy access to the receipt summary.

Troubleshooting Tip: If you do not see this FID in the modules and user groups where you are trying to implement this functionality, you must first enable the FID at the Super Agency level. After you enable the FID at the Super Agency level it becomes available in all modules and user groups.

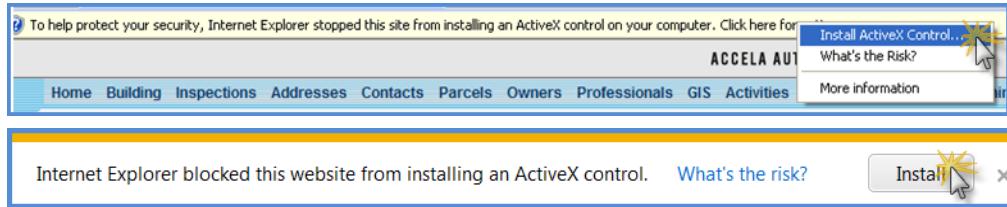
Refer to the Civic Platform Configuration Reference for instructions on enabling FIDs.



2. Configure ActiveX controls and trusted sites in Internet Explorer. This is a necessary component of customized receipt summaries – if you do not properly configure ActiveX controls, you cannot view or print customized receipts. Refer to the Accela Civic Platform Installation Guide and follow the

instructions in: "ActiveX Controls for Cashiering and Trust Accounts" and "Accela Server Trusted Site for Cashiering and Trust Accounts."

Troubleshooting Tip: If you have not installed ActiveX Controls, Internet Explorer notifies you with one of the prompts below. Follow the prompts to install ActiveX Controls.



Customizing the Content of Trust Account Notifications

You can customize the content of the following types of trust account communications:

- Detailed trust account receipt summaries
- Email notifications Civic Platform sends when a trust account balance falls below a threshold amount
- Trust account check endorsement details

To customize the content of trust account check endorsements or receipts

1. Access the Content Customize portlet ([Navigating to the Setup Portlet](#)).
2. In the Content Customize portlet, specify one of the following from the Type field in Content Customize: TRUSTACCOUNT_CHECK_ENDORSEMENT or TRUSTACCOUNT_RECEIPT_SUMMARY. For a description of using the Content Customize tool, see [Working with Communication Manager](#).

To enable the threshold notification email

1. Access the Notification Template portlet ([Navigating to the Setup Portlet](#)).
2. Configure the notification template with the following template name: AA_EMAIL_THRESHOLD_NOTIFICATION_CONTENT or AA_EMAIL_THRESHOLD_NOTIFICATION SUBJECT.

To set up trust account reports

1. Define the report using Report Manager. To use this tool, see [Report Manager](#).
 2. In Report Manager, do the following:
 - a. When adding the report, select the Parameter TrustAccountReceiptID or TransactionID from the Default Value field.
 - b. Assign the report to the portlet to get the custom report: specify either Link - Trust Account Withdraw portlet, or the Link - Trust Account Deposit portlet.
- Users can access the trust account reports through the Transactions list portlet in the Trust Account portlet. The Deposit For and Payment Method fields also display in Transactions list portlet. To set them up, see *Accela Civic Platform Configuration Reference*.

Associating Addresses with a Trust Account

You can associate a trust account with addresses for one or more records. This is a useful feature if the user or administrator wants to track billing for fees on the record, or set up automatic payments for record fees.

**Note:**

This feature can only associate addresses you have already listed in Civic Platform.

To associate addresses with a trust account

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Trust Account**.
3. Create a new trust account or open an existing trust account. For instructions, see [Creating a Trust Account](#) or [Searching for a Trust Account](#).
4. Select the **Associated Address** tab.
Civic Platform displays the Associated Address portlet.
5. Click **Associate Address**.
Civic Platform displays the Associated Address form portlet.
6. Complete any fields to search for the address you want to associate with the trust account.
7. Click **Submit**.
Civic Platform displays the results of your search.
8. Select each address that you want to associate with the trust account.
9. Click **Select**.
Civic Platform adds the address(es) to the trust account

Searching for a Trust Account

You can quickly search for a trust account by various pieces of account information. For example, you can search for a trust account by name, search for all active trust accounts, or search for all trust accounts that have a zero balance.

To search for a trust account

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).
2. Click **Search**.
Civic Platform displays the Trust Account search page.
3. Complete any fields that display. For a list of field descriptions, see [Table 164: Trust Account Form Fields](#).
4. Click **Submit**.

Table 164: Trust Account Form Fields

Account ID	The account ID number for the trust account.
Balance	The balance of the trust account in dollars
City	The city in which the address resides.
County	The county in which the address resides.
Description	The description of the trust account.
Dir	Choose a type of street, such as "Lane" or "Boulevard."

Direction	Use this drop-down list to indicate a street direction. For example, choose <i>N</i> to indicate a north direction. This usually indicated the directional area of a city or street, such as <i>North Broadway</i> .
Distance	Enter a distance from another landmark used to locate the address.
First Name	The first name of the person to whom you are assigning the trust account.
Inspection District Prefix	Enter the prefix for the inspection district within which the address resides.
Last Name	The last name of the person to whom you are assigning the trust account.
Ledger Account	The ledger account of the trust account.
Lot	The name, or boundaries, of the lot associated with the application.
Middle Name	The middle name of the person to whom you are assigning the trust account.
Neighborhood	The neighborhood within which the address resides.
Neighborhood Prefix	The prefix for the neighborhood within which the address resides.
Overdraft	No The trust account is not eligible for the overdraft option. Yes The trust account is eligible for the overdraft option.
Overdraft Limit	The overdraft limit amount, in dollars, for the trust account.
Parcel #	Part or all of the parcel number you are searching for.
People Type	Contacts Anyone other than licensed professionals associated with the trust account. Licensed Professional An individual who holds a license associated with the trust account.
Prefix	Any part of the address that should come before the street name or number, such as a direction. For example "north" in North Willow Drive
Range	The range number of the address.
Reference Address ID	The identification for any reference address.
Secondary Road	The road for the secondary address.
Secondary Road Number	The number of the address's secondary road.
Section	The section of the subdivision in which the address resides.
State	The state in which the address resides.
Status	Active The trust account is open and active. Closed The trust account is not active.
Street Name	The street name for the address.
Street # (end)	The street number that makes up the address. If you are searching for an address, you can specify a range of street numbers in the corresponding Start and End fields.
Threshold	When the trust account balance is below the threshold amount, Civic Platform can send a notification email to the address associated with trust account. To configure notifications, use the Content Customize tool. For further explanation see Working with Communication Manager . The two options to specify for this notification are: AA_EMAIL_THRESHOLD_NOTIFICATION_CONTENT and AA_EMAIL_THRESHOLD_NOTIFICATION SUBJECT
Type	The type of item associated with the property that you are searching for, such as Licensed Professional, Contact, Address or Parcel.
Unit # (Number)	The unit number, for example, the apartment number. If you are searching for an address, you can specify a range of unit numbers in the corresponding Start and End fields.
Unit Type	The type of structure for this address, for example, apartment or condo.

X Coordinate	The latitudinal coordinate for the address. Coordinates are useful when you use a GPS device to locate the property.
Y Coordinate	The longitudinal coordinate for the address. Coordinates are useful when you use a GPS device to locate the property.

Creating a Trust Account

You can create trust accounts for licensed professionals and other contacts in your Civic Platform system. Trust accounts are useful for individuals who need to pay fees for applications regularly, such as contractors. This not only saves the individual a trip to your agency to pay their fees, but also helps your agency staff by minimizing lines.

To create a trust account

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).
2. Click **New**.
Civic Platform displays the Account Detail tab on the Trust Account form portlet.
3. Complete any fields that display. For a list of field descriptions, see [Table 164: Trust Account Form Fields](#).
4. Click **Submit**.
Civic Platform creates the trust account and then displays the account information.
5. To add associated items to the trust account:
 - To associate addresses, follow the instructions as explained in [Associating Addresses with a Trust Account](#).
 - To associate parcels, follow the instructions as explained in [Searching for a Trust Account](#).
 - To associate individuals to the trust account, follow the instructions as explained in [Associating People with a Trust Account](#).
6. To remove items from the trust account:
 - To remove an associated address, follow the instructions as explained in [Removing Associated Addresses from a Trust Account](#).
 - To remove an associated parcel, follow the instructions as explained in [Removing Associated Addresses from a Trust Account](#).
 - To remove an associated individual from a trust account, follow the instructions as explained in [Removing Associated Addresses from a Trust Account](#).

Editing a Trust Account

You can edit trust account information at any time. Civic Platform allows you to change account detail fields, and add or remove individuals associated with the trust account.

To edit a trust account

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).
2. Select the trust account that you want to edit.
Civic Platform displays the Account Detail tab on the Trust Account form portlet.
3. Edit any fields that display. For a list of field descriptions, see [Table 164: Trust Account Form Fields](#).

4. Click **Submit.**

Civic Platform edits the trust account information.

5. To add associated items to the trust account:

- To associate addresses follow the instructions in [Associating Addresses with a Trust Account](#).
- To associate parcels follow the instructions in [Searching for a Trust Account](#).
- To associate individuals to the trust account follow the instructions in [Associating People with a Trust Account](#).

6. To remove items from the trust account:

- To remove an associated address follow the instructions in [Removing Associated Addresses from a Trust Account](#).
- To remove an associated parcel follow the instructions in [Removing Associated Addresses from a Trust Account](#).
- To remove an associated individual from a trust account follow the instructions in [Removing Associated Addresses from a Trust Account](#).

Removing Associated Addresses from a Trust Account

You can remove associated addresses from a trust account.

To remove associated addresses from a trust account

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Trust Account**.
3. Create a new trust account or open an existing trust account. For instructions, see [Creating a Trust Account](#) or [Searching for a Trust Account](#).
4. Select the **Associated Address** tab.
5. Select the address or addresses you want to remove.
6. Click **Delete**.

Civic Platform removes the selected addresses from the trust account.

Associating Parcels with a Trust Account

You can associate a trust account with parcels for one or many records. This is a useful feature if the user or administrator wants to track billing for fees on the record, or set up automatic payments for record fees. If there is a lock on a parcel, you cannot associate it with a trust account until you resolve the lock.



Note:

Civic Platform can only associate parcels that are currently in Civic Platform.

To associate parcels with a trust account

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Trust Account**.

3. Create a new trust account or open an existing trust account. For instructions, see [Creating a Trust Account](#) or [Searching for a Trust Account](#).
4. Select the **Associated Parcels** tab.
Civic Platform displays the Associated Parcels portlet.
5. Click **Associate Parcel**.
Civic Platform displays the Associated Parcel form portlet.
6. Complete any fields to search for the parcel you want to associate with the trust account.
7. Click **Submit**.
Civic Platform displays the results of your search.
8. Select each parcel that you want to associate with the trust account.
9. Click **Select**.
Civic Platform adds the parcel(s) to the trust account.

Removing Associated Parcels from a Trust Account

You can remove associated parcels from a trust account.

To remove associated parcels from a trust account

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Trust Account**.
3. Create a new trust account or open an existing trust account. For instructions, see [Creating a Trust Account](#) or [Searching for a Trust Account](#).
4. Select the **Associated Parcel** tab.
5. Select the parcel or parcels you want to remove.
6. Click **Delete**.
Civic Platform removes the selected parcels from the trust account.

Associating People with a Trust Account

It is best practice to associate a trust account with a contact or licensed professional who has the authority to deposit and withdraw funds from the trust account. Trust accounts are most useful for individuals who need to pay fees for applications regularly, such as a contractor.

To associate people with a trust account

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).
2. Create a new trust account or open an existing trust account. For instructions, see [Creating a Trust Account](#) or [Searching for a Trust Account](#).
3. Select the **Associated People** tab.
4. Complete one of these options:
 - To add a licensed professional to the trust account, click **Associate Licensed Professional**.
 - To add a contact to the trust account, click **Associate Contact**.

Civic Platform displays the Associated People form portlet.

5. Complete any fields to search for the individual you want to associate with the trust account.

6. Click **Submit**.

Civic Platform displays the results of your search.

7. Select each individual that you want to associate with the trust account.

8. Click **Add to Trust Account**.

Civic Platform adds the individual to the trust account.

Removing Associated People from a Trust Account

You can remove associated individuals from a trust account. For example, if the foreman of a construction company resigns, you can remove that individual's association from the trust account.

To remove associated people from a trust account

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).
2. Create a new trust account or open an existing trust account. For instructions, see [Creating a Trust Account](#) or [Searching for a Trust Account](#).
3. Select the **Associated People** tab.
4. Select the individual(s) you want to remove.
5. Click **Delete**.

Civic Platform removes the selected individuals from the trust account.

Viewing Associated Records for a Trust Account

For more information about the Associated Records tab refer to [Figure 62: Viewing Records Associated with a Trust Account](#).

The screenshot shows the Civic Platform Trust Account interface. At the top, there is a menu bar with options: Menu, New, Search, Reset, and Help. Below the menu is a toolbar with navigation icons (back, forward, first, last, etc.) and a status bar showing '1' record found.

Associated People Tab:

Account ID	Balance	Description	Overdraft	Overdraft Limit	Status	Ledger Account	Threshold Amount
BLD2012-0001	\$24,994.75		Yes	\$1,000.00	Active		
BLD2012-0002	\$52,500.00	Ace Builders	No	\$0.00	Active		\$6,000.00
BLD2012-0003	\$900.00	Chandler Genera...	No	\$0.00	Active		\$1,000.00
TEST ACCOUNT	\$9,945,180.00		Yes	\$100,000.00	Active		

Associated Record Tab:

Record ID	ALT ID	Record Type	Short Notes	Assigned to Department	Assigned to Staff	Association
12CAP-00000-0003N	BLD12-00009	Building/Residential/New/NA				Record
12CAP-00000-00045	BLD12-00010	Building/Commercial/New/NA		Building	Building ...	Parcel
12CAP-00000-00045	BLD12-00010	Building/Commercial/New/NA		Building	Building ...	Parent Record
12CAP-00000-0005T	BLD12-00012	Building/Multi-Family/New/NA				Parcel

Figure 62: Viewing Records Associated with a Trust Account

Configuring Public User Permission for a Trust Account

You can grant permissions that enable a public user (citizen or authorized agent) to perform trust account transactions and print trust account reports in Citizen Access.

To enable public user permissions for a trust account

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).
2. Create a new trust account or open an existing trust account. For instructions, see [Creating a Trust Account](#) or [Searching for a Trust Account](#).
3. Select the **Public User Permission** tab.
4. Click **Look Up**.

Civic Platform displays the public user search portlet.

5. Enter search criteria as needed and click **Submit**.

Civic Platform returns a list of public users that meet the search criteria.

6. Select the public user you are granting trust account permissions.

Note that you can only enable permissions for citizens and authorized agents to use a trust account. You cannot enable authorized agent clerks to use trust accounts. You can associate one and only one trust account with an authorized agent.

7. Click **Approve**.

The approved public user can pay with the trust account in the Citizen Access website.

Closing a Trust Account

When a trust account is no longer needed, you can close it. You cannot delete a trust account, you can only close it. There are several reasons why you might want to close a trust account. For example, if the trust account owner wants to close it, the trust account is dormant, or if you opened the a trust account erroneously. You can close a trust account at any time and if needed, you can reopen a closed trust account.

To close a trust account

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).
2. Select the trust account that you want to close.
3. Click **Close** from the toolbar drop-down menu.

Civic Platform closes the trust account.

Automating Trust Accounts

See *Accela Civic Platform Configuration Reference*.

Managing Trust Account Transactions

After you set up a trust account, you can use the account to perform transactions. Transactions include depositing, withdrawing, and transferring money. You can also make adjustments to a trust account as needed.

Topics

- [Depositing Money into a Trust Account](#)
- [Transferring Money between Trust Accounts](#)
- [Withdrawing Money from a Trust Account](#)
- [Making an Adjustment to a Trust Account](#)

Depositing Money into a Trust Account

One of the first transactions performed on a trust account is depositing money. You can deposit money into an active trust account at any time.

To deposit money into a trust account

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).

2. Select the trust account that you want to edit.

Civic Platform displays the Account Detail tab on the Trust Account form portlet.

3. Select **Deposit** from the drop-down menu.

4. Enter the dollar amount you want to deposit in the **Amount** field.

5. Click **Submit**.

Civic Platform deposits the money into the selected trust account and then displays the Account Detail tab.

Transferring Money between Trust Accounts

If an individual has multiple trust accounts they can transfer money between their accounts. The individual must have a legitimate stake in each account involved in the fund transfer. You can only transfer funds between accounts associated with the same individual.

To transfer money between trust accounts

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).

2. Select the trust account that you want to transfer money from.

Civic Platform displays the Account Detail tab on the Trust Account form portlet.

3. Select **Transfer** from the drop-down menu.

4. Enter the dollar amount you want to transfer in the **Amount** field.

5. Select the trust account you want to transfer the money to from the **Target Account ID** drop-down list.

6. Click **Submit**.

Civic Platform transfers the money into the selected trust account and then displays the Account Detail tab.

Withdrawing Money from a Trust Account

To withdraw money from a trust account

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).

2. Select the trust account that you want to withdraw funds from.

Civic Platform displays the Account Detail tab on the Trust Account form portlet.

3. Select **Withdraw** from the drop-down menu.
Civic Platform displays the Withdraw fields for the selected trust account.
4. Enter the dollar amount you want to withdraw in the **Amount** field, add **Comments**.
5. If you added the Payment Method field to the Withdraw form for this trust account, specify the **Payment Method**.
6. Click **Submit**.
Civic Platform withdraws the money from the selected trust account and then displays the Account Detail tab.

Making an Adjustment to a Trust Account

Civic Platform allows you to make adjustments to a trust account, for example, if you make an accounting error, you can make the necessary correction. Adjustments allow you to add or remove money from a trust account.

To make an adjustment to a trust account

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).
 2. Select the trust account that you want to withdraw funds from.
Civic Platform displays the Account Detail tab on the Trust Account form portlet.
 3. Select **Adjust** from the drop-down menu.
 4. Complete these fields and options:
- | | |
|-------------------------------------|---|
| Amount | Enter the dollar amount you want to adjust for the selected trust account. |
| Transaction Type - Credit
Adjust | Select this option to add money into the trust account for entered amount. |
| Transaction Type - Debit Adjust | Select this option to remove money from the trust account for the entered amount. |
5. Click **Submit**.

Civic Platform adjusts the money for the selected trust account and then displays the Account Detail tab.

Viewing and Printing Trust Account Reports

Civic Platform provides multiple types of reports to help your agency keep track of trust accounts. You can view and print trust account reports as needed.

Topics

- [Viewing the Transaction History of a Trust Account](#)
- [Printing the Negative Balance Trust Account Report](#)
- [Printing a Trust Account Transaction Report](#)

Viewing the Transaction History of a Trust Account

You can view the entire transaction history of a trust account, which can be helpful if a customer disputes transactions, if you discover an accounting error, or if you need to produce records for an audit. You can view the transaction history of any trust account at any time.

To view the transaction history of a trust account

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).
2. Select the trust account for which you want to view the history.
Civic Platform displays the Account Detail tab on the Trust Account form portlet.
3. Select the **Transactions** tab.
Civic Platform displays the history for the selected trust account.

Printing the Negative Balance Trust Account Report

If your agency allows individuals to overdraw their trust accounts, the Negative Balance report helps you keep track of individuals that owe your agency money. The report shows you all of the trust accounts that currently have a negative balance.

To view the negative balance trust account report

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).
2. Select **Negative Balance Trust Account Report** from the primary portlet drop-down menu.
Civic Platform displays the Negative Balance Trust Account Report.
3. Print the report using your browser.

Printing a Trust Account Transaction Report

The Transaction report enables you to print individual transaction records. Transaction reports are helpful if an individual either needs a receipt of the transaction, or has questions regarding past transactions. You can select the transactions from the trust account history list that you want to print, and then print either individual transactions or multiple transactions.

To print a trust account report

1. Access the Trust Account portlet ([Navigating to the Setup Portlet](#)).
2. Select the trust account that you want to print a report for.
Civic Platform displays the Account Detail tab on the Trust Account form portlet.
3. Select the **Transactions** tab.
4. Select the transactions you want to print a report for.
5. Click **Print Report**.
Civic Platform displays a report of the selected transactions.
6. Click **Print** from your browser toolbar or select **Print** from the browser menu.
Civic Platform prints the selected transactions report.

Module Merchant Accounts

Civic Platform and Citizen Access allow agencies to use module-level merchant accounts for processing payments. This means that if an agency has separate merchant accounts for its sub-agencies or departments (or "modules"), multiple fees for various modules within a shopping cart can be submitted to the appropriate module merchant accounts. An agency has the ability to:

- Separately process payments in a shopping cart containing records from multiple departments (or multiple sub-agencies in a multi-agency environment)
- Use a single payment provider for all transactions, even if each agency and sub-agency department may have its own merchant account
- Prevent citizens from making cross-agency payments in multi-agency environments
- Configure separate merchant accounts for each department in an agency (or sub-agency in Super Agency environments). Each department is permitted to have one merchant account for fee items and one merchant account for convenience fees. For example, an agency with 3 departments can have 3 merchant accounts for fee items and 3 merchant accounts for convenience fees.

The configurations required for module merchant accounts assume that the agency is using an ePayments adapter to process payment transactions for a merchant account used with Civic Platform and/or Citizen Access. For information about ePayments adapters, see the Civic Platform ePayments SDK Development Guide included in the Epay SDK zip package.

Related Information

[Configuring Trust Account Functionality](#)

[Managing Trust Account Transactions](#)

[Viewing and Printing Trust Account Reports](#)

Configuring Module Merchant Accounts

By default, Civic Platform payment transactions are processed and submitted to agency-level merchant accounts. Prior to 8.0.1, payment transactions for all departments or modules within an agency can only use the agency-level merchant accounts. The 8.0.1 release adds the capability to assign a merchant account to a module, which allows payment transactions to use either agency-level or module-level merchant accounts.

The module-level merchant account feature is currently supported in the web service ePayments adapters, such as the PayPal, Official Payments STP, Virtual Merchant adapters. This feature is *not* supported in the redirect ePayment adapters, such as the Official Payments CoBrand, and ACA Online Payment adapters.

Enabling the usage of module-level merchant accounts requires the following configurations:

- **Insert a merchant account per module into the XPOLICY table.**

This configuration requires assistance from Accela Customer Support and agency DBA to run a SQL script that updates the XPOLICY table. A row needs to be added to the XPOLICY table which contains the required fields that specify the payment gateway and ePayment adapter configuration data.

For a module-level merchant account row in XPOLICY, the LEVEL_DATA field must specify the module using the following format:

```
<paymentGatewayName>_<environment>_<moduleName>
```

where `paymentGatewayName` is the name of the ePayment adapter type, `environment` is either `Test` or `Live`, and `moduleName` is the name of the module (such as `Building`, `Enforcement`, `Licensing`, etc) to which the merchant account is assigned. For example, specify `PayPal43_Test_Building` for a `Building` module PayPal merchant account in a test environment. Note that the `<paymentGatewayName>_<environment>` value corresponds to the value description defined for either the `ACAAAdapterType` or `AdapterType` value for the existing EPaymentAdapter standard choice configuration.

The module-level merchant account can use any of the existing adapter types (such as `ePayments3`, `Redirect`, and others), as specified on the `DATA1` field. If the module or department plans to use separate merchant accounts for item fees and convenience fees, use the `MultipleAccountsEPayment` adapter type on the `DATA1` field. To specify the merchant accounts for principle item fees and convenience fees, as well as the convenience fee formula, go to Civic Platform V360 Administration Tool > Finance > Merchant Account Settings > Merchant Account Details and Convenience Fee Formula.

The merchant account information for the module is specified in one of the `DATA` fields, depending on the type of ePayment adapter. The rest of the fields for the module-level merchant account row follow the same format specification for agency-level merchant account rows.

For details about `XPOLICY` fields for the ePayment adapters, see Civic Platform ePayments SDK Development Guide > Appendix A: `XPOLICY` Table Settings for ePayment Adapters.

- **Configure the standard choice `ENABLE_MERCHANT_ACCOUNT_BY_MODULE`.**

Set the standard choice `ENABLE_MERCHANT_ACCOUNT_BY_MODULE` to `Yes`, which allows an agency to enable payment transactions in Civic Platform and Citizen Access to use merchant accounts at the module level. When you set the `ENABLE_MERCHANT_ACCOUNT_BY_MODULE` to `Yes`, note the following:

- If the `ALLOW_CROSS_AGENCY_RECORDS_IN_CART` value is added to the standard choice item `ACA_CONFIGS` and set to `Yes`, cross-agency records in a shopping cart are processed per module.
- If the `ALLOW_CROSS_AGENCY_RECORDS_IN_CART` standard choice value 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.
- If the existing `PAYMENT_TRANSACTION_SETTING` for the current agency the user is logged into is set to 0 (zero), the payment transactions are grouped and processed per agency and module.

Processing Payments By Module

An agency can process cross-agency record payments separately regardless of the agency the records belong to, or can group and process cross-agency record payments per agency. This capability is controlled by `PAYMENT_TRANSACTION_SETTING` which is a Civic Platform environment setting defined in the `XPOLICY` table. If the `PAYMENT_TRANSACTION_SETTING` value is set to 1 for the agency the user is currently logged into, each record payment in a shopping cart is processed separately, regardless of the agency that the records belong to. If `PAYMENT_TRANSACTION_SETTING` is set to 0, the record payment transactions are grouped and submitted per the agency that the records belong to.

The standard choice `ENABLE_MERCHANT_ACCOUNT_BY_MODULE` enhances the agency-level payment processing by allowing an agency to process record payments per module (or department) within an agency. If the `PAYMENT_TRANSACTION_SETTING` is set to 0 for the agency the user is currently logged into, and if `ENABLE_MERCHANT_ACCOUNT_BY_MODULE` is set to `Yes`, the records in a shopping cart are grouped by the agency that the record belongs to, and then processed per module. This means that when a user pays for cross-agency records in a shopping cart, all records belonging to the same module will be submitted as a single payment transaction to the module's merchant account.

The `ENABLE_MERCHANT_ACCOUNT_BY_MODULE` applies to payments submitted on the Record > Payment, Payment Processing, Sets, and Point of Sale portlets in Civic Platform, and on the Record Detail page in Citizen Access.

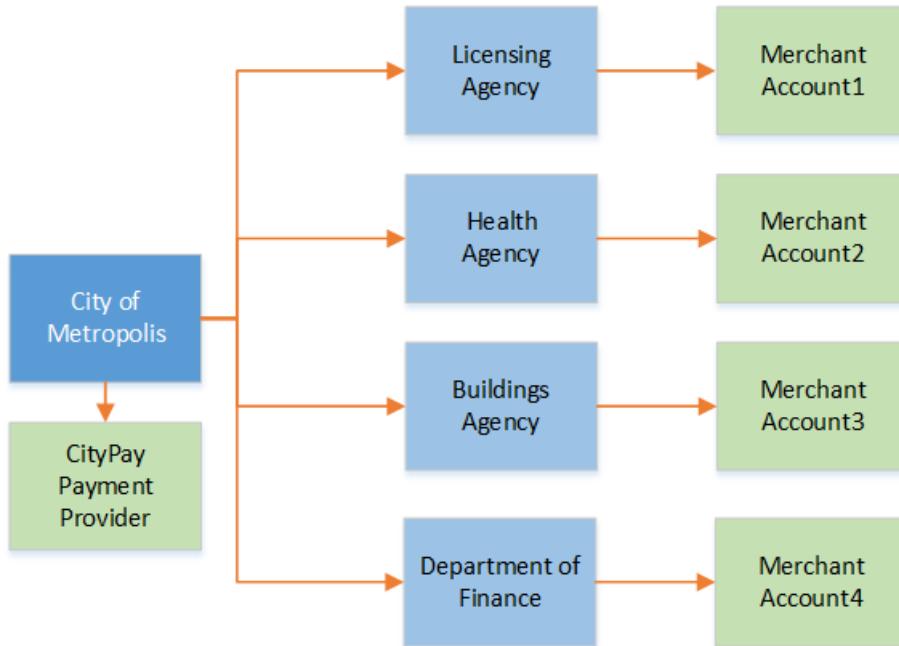
Note: If `PAYMENT_TRANSACTION_SETTING` is set to 1, record payments are processed as separate transactions regardless of the `ENABLE_MERCHANT_ACCOUNT_BY_MODULE` setting.

Usage Scenarios with Module Merchant Accounts

After modules (such as departments or sub-agencies) are set up with merchant accounts and the standard choice configuration `ENABLE_MERCHANT_ACCOUNT_BY_MODULE` is enabled, citizen users now have the capability to:

- Add records from multiple modules in a single shopping cart payment experience, and each payment is processed with the applicable module merchant account. For this scenario, the `ALLOW_CROSS_AGENCY_RECORDS_IN_CART` value under `ACA_CONFIGS` setting also needs to be enabled.
- Pay for single records separately, and each payment is processed with the applicable module merchant account. For this scenario, also the `PAYMENT_TRANSACTION_SETTING` also needs to be set to 0.

The following scenarios illustrate the new capabilities. Consider an agency that has been set up as a Super Agency with the following sub-agencies, each with its own merchant account. In this example, The city is using a single payment provider (CitiPay) for all agencies; payments submitted by citizens are using the Citizen Access Redirect approach in which payments are processed through CitiPay's retail payment site.



Scenario: Application fee and convenience fee payments to separate merchant accounts

A citizen applies for a new application for Health Agency and proceeds to pay. The citizen selects the payment method as "Credit Card" and proceeds to process their payment via the redirect to CitiPay, the city payment provider. The following items are sent to CitiPay for payment:

- New application fee – Health Agency Merchant Account2

- Convenience fee amount – Finance Department merchant account

Scenario: Renewal and new application fees to the same merchant account, convenience fee to a separate merchant account

A citizen submits their renewal application for Licensing Agency and adds this transaction to the shopping cart on Citizen Access, and proceeds to apply for a new license application. Both of these transactions are in the shopping cart and the citizen proceeds to check-out. The citizen selects the payment method as "Credit Card", and proceeds to process their payment via the redirect to CitiPay, the city payment provider. The following items are sent to CitiPay for payment:

- Renewal application fee - Licensing Agency merchant account
- New application fee – Licensing Agency merchant account
- Convenience fee amount – Finance Department merchant account

Scenario: Renewal fee, fine, and convenience fee to separate merchant accounts

A citizen submits their renewal application for Licensing Agency and adds it to the Shopping Cart on Citizen Access. The citizen also has an outstanding fine for the Health Agency that they wish to pay, and adds the fine to the Shopping Cart. The citizen proceeds to pay their items in the Shopping Cart using the payment method of "Credit Card". This would add the Convenience Fee to the total amount (Convenience fee goes to the Finance Department merchant account). In this scenario there would be three line items:

- Renewal application fee - Licensing Agency merchant account
- Late fee – Health Agency merchant account
- Convenience Fee amount – Finance Department merchant account

Point of Sale

This section describes how On-Premise customers can configure Civic Platform to accept point of sale payments.

The audience for this section is an agency who hosts its own Civic Platform server and data. If Accela hosts the Civic Platform server at its data center, consult with the Accela Success Community: <https://accela.force.com/success> for information on successfully implementing your point of sale system, including receipt set up.

When configuring the point of sale, a fee schedule must exist and it needs to include the CONSTANT formula, CONSTANT value, and FINAL period. To plan and configure a fee schedule, see the [Understanding Fee Items](#). For complete details refer to [Setting Up a Point of Sale Fee Item and Fee Schedule](#).

Part of setting up a fee item, including fee items for a record or fees for point of sale items, is generating a receipt and printing a receipt. By default, Civic Platform generates a system default receipt number for receipts.

For a broader explanation of all pre-defined sequences available in Civic Platform see the receipts listed in [Defining Sequences, Masks, and Autonumbering](#).

For a list of supported web browsers, refer to the [Civic Platform Release Notes](#).

Click a topic title below for full details.

Related Information

[Point of Sale Prerequisites](#)

[Configuring the Point of Sale](#)

Point of Sale Prerequisites

Prior to performing the setup steps in this section, you must configure the following FIDs and Standard Choices.

- FID 8288 Fees Point of Sale and FID 8289 Fees Point of Sale Refund
- Standard Choices POINT_OF_SALE_TYPE and POINT_OF_SALE_FEE_SCHEDULE

Follow the instructions in the *Accela Civic Platform Configuration Reference*.

Configuring the Point of Sale

Complete the steps in order as presented to ensure that the point of sale feature works properly. Refer to the following sections for complete details.

In summary, to configure the point of sale:

1. Set the point of sale Function Identifications (FID) 8288 Fees Point of Sale, and 8289 Fees Point of Sale Refund to Full Access, and set the user group access level.
2. Set up a point of sale fee schedule for each Accela module your agency uses. For information on managing fee schedules, see [Understanding Fee Items](#).
3. Create two Standard Choices: First create POINT_OF_SALE_TYPE and then create POINT_OF_SALE_FEE_SCHEDULE. Set the values for each of these Standard Choices according to the instructions in the Civic Platform Configuration Reference.
It is important to specify correct values for these Standard Choices to ensure proper implementation of this feature. The Civic Platform Configuration Reference provides complete documentation for setting up these Standard Choices.
4. Configure the receipt sequence and its mask definition. For a general discussion of the Sequence Generator function, see [Defining Sequences, Masks, and Autonumbering](#).

After you complete these steps, point of sale fees work like all other fees in Civic Platform. Civic Platform adds, assesses, and processes fee items through a cashier payment without an associated application.

Because Civic Platform automatically invoices point of sale fee items, users can only add and void fee items. When users apply payment in point of sale, Civic Platform processes it automatically without a payment apply screen.

Setting Up a Point of Sale Fee Item and Fee Schedule

When setting up the point of sale fee item the fee schedule must match the Standard Choice value exactly. Both the fee item code and the fee schedule have a maximum character length of 12.

To set up a point of sale fee item

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Fees > Fee Items**.
3. Click **Add**.
Civic Platform displays the Fee Item - Add page.

Fee Item - Add

Use this form to add Fee Item.

Fee Item Code * :	<input type="text"/>												
Fee Schedule * :	PLN_GENERAL												
Version * :	V1.0												
Fee Description:	<input type="text"/>												
Comment: (max 2000 char)	<input type="text"/>												
Unit:	<input type="button" value="▼"/>												
Calc Formula:	LINEAR_WITH_MIN_MAX												
Calc Variable:	<input type="text"/>												
Default Value:	<input type="text"/>												
Fee Indicator (Qty.):	<input type="text"/>												
Round Fee Item:	<input type="radio"/> Y <input checked="" type="radio"/> N <input type="radio"/> Round Up <input type="radio"/> Round Down <input type="radio"/> Round to Nearest												
Required:	<input type="radio"/> Y <input checked="" type="radio"/> N												
Auto Invoiced:	<input type="radio"/> Y <input checked="" type="radio"/> N												
Auto Assess:	<input type="radio"/> Y <input checked="" type="radio"/> N												
Quantity:	<input type="text"/>												
Priority:	<input type="text"/>												
Minimum:	<input type="text"/>												
Maximum:	<input type="text"/>												
Seq for Calculation:	<input type="text"/>												
Display Order:	<input type="text"/>												
Display in ACA:	<input checked="" type="radio"/> Y <input type="radio"/> N <input type="radio"/> Read-only												
Required in ACA:	<input type="radio"/> Y <input checked="" type="radio"/> N												
Assess Adjustment on Recalculation:	<input type="radio"/> Y <input checked="" type="radio"/> N												
Adjustment Credits Allowed:	<input type="radio"/> Y <input checked="" type="radio"/> N												
Status:	<input checked="" type="radio"/> Enable <input type="radio"/> Disable												
Payment Period * :	FINAL												
Sub Group:	<input type="text"/>												
Fee Allocation:	<input checked="" type="radio"/> No Allocation <input type="radio"/> Percentage <input type="radio"/> Fixed Amounts and Residual												
Account Code:	<table border="1"> <tr> <td>1.</td> <td><input type="text"/></td> <td>%</td> <td><input type="text"/></td> </tr> <tr> <td>2.</td> <td><input type="text"/></td> <td>%</td> <td><input type="text"/></td> </tr> <tr> <td>3.</td> <td><input type="text"/></td> <td>%</td> <td><input type="text"/></td> </tr> </table>	1.	<input type="text"/>	%	<input type="text"/>	2.	<input type="text"/>	%	<input type="text"/>	3.	<input type="text"/>	%	<input type="text"/>
1.	<input type="text"/>	%	<input type="text"/>										
2.	<input type="text"/>	%	<input type="text"/>										
3.	<input type="text"/>	%	<input type="text"/>										
<input type="button" value="Save"/> <input type="button" value="Cancel"/>													

4. Complete the Fee Item fields that apply to Point of Sale in [Table 165: Fee Item Fields Applicable to Point of Sale](#). For more information see [Understanding Fee Items](#).
5. Click **Save**.
6. To create more Fee Items for this Point of Sale fee schedule click **Copy** and edit the Fee Item Code and Fee Description.

Table 165: Fee Item Fields Applicable to Point of Sale

Fee Item Code	Enter a unique code to identify the source or purpose of the Point of Sale fee item. For example, shirt, hat, map, or mug.
---------------	--

Fee Schedule	Enter the fee schedule that this fee item belongs to. Make certain that the fee schedule is exactly the same as the Standard Choice Value Description. For example, if you are adding a fee schedule for the Building module the fee schedule is POS_BLD_SCH.
Version	Choose the fee schedule version. A fee schedule can have different versions based on the start fee and end fee date.
Fee Description	Enter a brief description of the fee item to identify its source or purpose. For example, if the fee item you created was a map the fee description might be a map of city streets.
Comment	Enter a detailed description of the fee item to explain the fees purpose, logic, and any additional information associated to the fee.
Unit	Choose a fee unit from the drop-down list. For example, if you assess the fee on area, select the unit representative of square footage.
Calc Formula	<p>Choose CONSTANT from the drop-down list for all Point of Sale items. For all point of sale fee items, choose CONSTANT from the drop-down list. The CONSTANT fee formula enables you to establish a set fee independent of ranges or valuations.</p> <p>For example, if you want to establish a flat rate for a city map, you can use the CONSTANT fee formula to establish a \$10 fee.</p> <p>Any fee calculated using this formula is the product of the constant and the quantity that a user enters while assessing fees. In this example, if you specify that a constant for an electrical application is \$10 and a user enters 2 as the quantity, then the total fee for two electrical applications is \$20.00.</p> <p>For more information the CONSTANT formula, see Fee Formulas.</p>
Calc Variable	For point of sale, the Calc Variable only supports numbers. For example, you might enter: 10.
Default Value	If you want the fee item to have a default quantity value, choose Y and enter the default quantity in the field. If you do not want a default quantity, choose N.
Round Fee Item	<p>If you want the calculated fee item to round to the nearest dollar amount, choose Y, and then choose either Round Up, Round Down, or Round to Nearest dollar. If you want the fee to display the exact value, choose N.</p> <p>For example, your agency charges an Inspection Penalty Fee if a property is not ready for an inspection when the inspector arrives.</p> <p>You can use a percentage formula to penalize 10% of the original inspection fee. This 10% value as calculated by the formula could be \$4.56. To ensure the Inspection Penalty Fee is always a round number, select this option to round up the fee.</p>
Status	If you want to make the fee item available to users in Civic Platform, select Enable; otherwise, select Disable.
Payment Period	You must choose Final for the payment period, because point of sale items are not dependent on an application review process.
Subgroup	Enter the code for the subgroup to which this fee item belongs. A fee item can belong to multiple subgroups. If you want this fee to belong to more than one subgroup, separate each group with a delimiter, such as a comma.
Account Code	If your agency wants to apportion this fee item to one of your agency accounts, you can enter up to three codes for the account here. These codes do not affect Civic Platform, but you can use them for your agency's budget purposes.

Payment Processing

Administrators can configure Civic Platform to enable processing tools that allow for easy intake of payments across multiple records and Point of Sale (POS) items. Citizens can pay for fee items using multiple tenders at the agency's place of business. Agency cashiers handle payments for each record by manually entering the payment information, or using a magnetic card reader to read credit card information.

Click a topic title below for full details.

Related Information

[Configuring the Payment Processing Console](#)

[Enabling Automatic Payment Allocation](#)

[Configuring Online Payment Processing](#)

[Setting Up Payment Functionality Online](#)

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.

Configuring the Payment Processing Console

Civic Platform stores payment amounts in Civic Platform as a transaction payment history. For example, an inspector can pay his renewal license fees or he can buy a map from a clerk at the County building. The Payment Processing Console and functions that display below [Figure 63: Payment Processing Console](#) have complete details in the "Managing Payments" section of the *Civic Platform User Guide*.

The screenshot shows the Civic Platform Payment Processing console. At the top, there's a menu bar with options like 'Menu', 'Add Fees', 'Add POS Item', 'Add Renewals', 'Pay', 'Delete', 'Help', 'My QuickQueries', and 'Today's Fee (G)'. Below the menu is a toolbar with buttons for 'Payment', 'Refund', 'Void', 'Invoices', and 'History'. The main area has search fields for 'Record ID', 'State License #', and 'Invoice Number', each with a magnifying glass icon. A status message 'Fee Total \$0.00' is displayed. Below the search fields is a table header with columns: 'Record ID', 'Address', 'Parent Record ID', 'Invoice #', 'Payment Period', 'Fee Item', 'Quantity', 'Unit Amount', 'Fees', 'Paid', and 'Outstanding'. A note below the table says '0 record(s) found.' The bottom section is titled 'Payment' with buttons for 'Pay', 'Add', 'Delete', and 'Help'. It contains fields for 'Payment Method' (dropdown), 'Account Number', 'Amount' (text input), 'Reference #', 'Received' (dropdown), 'CC Auth. Code' (text input), 'Payor' (text input), and a 'Comment' text area. Below these fields are summary lines: 'Fee Total: \$0.00', 'Total Tendered: \$0.00', 'Balance: \$0.00', 'Change: \$0.00', and 'Unapplied Credit: \$0.00'. A 'Save' button is located at the bottom right.

Figure 63: Payment Processing Console

Specify acceptable payment methods for each Civic Platform module that your agency uses. For example, configure the cash option, the credit card option, and the trust account option to display for Civic Platform users to choose from.

You can enable a Received drop-down list field on all payment locations in Civic Platform, such as the Payment Processing console or the Payment tab of a record. This field displays the form of payment, such as In Person, Mail, and Fax. On the Refund page the drop-down field displays Refund and indicates the form of the refund, such In Person or Credited to Card.

You can also use a single invoice for multiple records.

Enabling Automatic Payment Allocation

The automatic payment allocation function bypasses the allocation screen when you process a full payment or an overpayment from the Payment tab for a specified group.

For example, when a cashier selects one or more fee items and processes a full payment or an overpayment on a record, Civic Platform automatically allocates the payment amounts to any specified fee item without any interaction by the user. Civic Platform bypasses the payment processing allocation screen and processes the payment transaction immediately.

Configuring Online Payment Processing

Your agency can accept online payments in the form of checks, credit cards and ACH transactions by connecting with a payment provider such as Accela CivicPay or PayPal. To connect with a payment provider, you must configure an Accela-provided ePayment adapter.

For example, Accela provides an adapter to connect Civic Platform to the PayPal Payflow ePayment Gateway.

The Civic Platform adapter supports the following providers:

- Accela CivicPay
- Custom Redirect
- Official Payments CoBrand+
- Official Payments STP
- PayPal Payflow Pro 4.3 (with a merchant account for a bank that PayPal supports).
- Virtual Merchant

When choosing which ePayment adapter you implement, Accela recommends using Accela CivicPay for its modern, integrated user experience. Another recommendation is PayPal Payflow Pro4.3 (with a merchant account for a bank that PayPal supports).

After you complete the ePayment adapter configuration, you must configure online payments in Citizen Access, see [Setting Up Payment Functionality Online](#).

Setting Up Payment Functionality Online

Citizen Access leverages payment configuration within Civic Platform and enables you to provide payment services online. You configure most online payments in Civic Platform and set up additional options for Citizen Access.

After your agency has configured online payments for Civic Platform, you must customize the associated online payment web pages in Citizen Access. Refer to “Customizing Fee Pages” in the *Citizen Access Administrator Guide* for a list of pages that require customization.

Time Accounting Tracker

You can define any number of Time Accounting types with details about the type of activity that you are recording. You can then assign a default hourly rate adjustment -- or a percentage adjustment -- to use to assess the cost of the activity. Time Accounting provides methods for assigning various security settings, Time Accounting types, and hourly rates to specific users.

If you want to assign rights to time accounting supervisors to allow them to lock other user's time accounting, the details on how to use and set up are in [Locking Time Accounting for Another User](#).

To allow users to add multiple time accounting entries on inspection details and to the workflow tasks, see the functionality described in [Configuring Access to Inspections and Workflow](#).

Begin by configuring the Time Accounting Groups, then the types. Time Accounting Types must belong to a Time Accounting Group, and User profiles must belong to a Time Accounting Group and Type.

Click a topic title below for full details.

Related Information

[Managing Time Accounting Groups](#)

[Managing Time Accounting Types](#)

[Managing Time Accounting User Profiles](#)

[Configuring Access to Inspections and Workflow](#)

[Locking Time Accounting for Another User](#)

Managing Time Accounting Groups

Use Time Accounting Groups to categorize Time Accounting Types. From the Time Accounting Group portlet, the agency user can create a group and assign Time Accounting Types, User or User Group permissions. These groups become the tasks for which the user is tracking his time. For example, the agency user creates a Time Accounting Group called Electrical Permit, and associated tasks include electrical inspections.

To control access to time accounting entries in Civic Platform and Mobile Office, see the required settings in [Configuring Access to Inspections and Workflow](#).

Topics

- [Creating a Time Accounting Group](#)
- [Searching for a Time Accounting Group](#)
- [Editing a Time Accounting Group](#)
- [Inactivating a Time Accounting Group](#)
- [Managing Time Accounting Group Permissions](#)

Creating a Time Accounting Group

Users can create a new Time Accounting Group to fit the needs of the agency.

To create a new Time Accounting group

1. Access the Time Accounting Group portlet ([Navigating to the Setup Portlet](#)).

2. Click **New.**

Civic Platform displays the New Time Accounting Group form in the secondary portlet.

New Time Accounting Group		
Group Name *	Record Status	Record By *
<input type="text"/>	Active	ADMIN
Description <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>		

3. Enter the Group Name and information in any of the other desired fields.

For a list of Time Accounting Group Detail fields, see [Table 166: Time Accounting Group Detail Fields](#).

4. Click **Submit.**

Civic Platform adds the Group to the Time Accounting Group list and displays the new Group detail in the detail portlet.

5. Add User or User Group permissions and Time Accounting Types to the new Time Accounting Group.

For instruction on how to add a User or User Group, see [Managing Time Accounting Group Permissions](#).

For instruction on how to add Time Accounting Types, see [Managing Time Accounting Types within a Group](#).

Searching for a Time Accounting Group

Search within the Time Accounting Group list for an existing group. For example, if you are not sure whether a group you want to add already exists, you can search for it.

To search for an existing Time Accounting group

1. Access the Time Accounting Group portlet ([Navigating to the Setup Portlet](#)).

2. Click **Search.**

Civic Platform displays the Time Accounting Group search page.

3. Enter search criteria for the group you want.

For a list of Time Accounting Group Detail fields, see [Table 166: Time Accounting Group Detail Fields](#).

4. Click **Submit.**

Civic Platform displays the groups that match the search information.

5. If more than one group fits the criteria, click the name of the group you want, or try searching again with more information.

Editing a Time Accounting Group

Users can edit the details in an existing Time Accounting Group.

To edit a Time Accounting group

1. Access the Time Accounting Group portlet ([Navigating to the Setup Portlet](#)).

2. Search for the group you want to edit and click the group name to open the detail portlet.

For instructions on how to search for an existing Time Accounting Group, see [Searching for a Time Accounting Group](#).

3. Enter the updated information in the desired fields.

For a list of Time Accounting Group Detail fields, see [Table 166: Time Accounting Group Detail Fields](#).

4. Click **Save**.

Table 166: Time Accounting Group Detail Fields

Group Name	Enter a distinctive name for the group. This name displays in the Time Accounting Group drop-down list in the User Time Accounting portlets. For example, Application.
Record Status	Select whether the Group record is active or inactive.
Description	Enter a description for the Time Accounting group. For example, if the group name is Application, the description might be "Any work completed on an application."
Record By	Civic Platform populates the name of the user who creates or updates the group.
Record Date	Civic Platform populates the date you created or updated the group.

Inactivating a Time Accounting Group

You cannot delete Time Accounting Groups. Users can deactivate groups at any time, even they have attached Time Accounting Types.

To deactivate a Time Accounting group

1. Access the Time Accounting Group portlet ([Navigating to the Setup Portlet](#)).
2. Search for the group you want to edit and click the group name to open the detail portlet.
For instructions on how to search for an existing Time Accounting Group, see [Searching for a Time Accounting Group](#).
3. Complete one of these tasks:
 - Select the Time Accounting Group(s) you want to deactivate, and then click **Delete**.
 - In the detail portlet for the desired group, select Inactive from the Record Status drop-down field, and then click **Save**.
Civic Platform deactivates the Time Accounting Group(s).

Managing Time Accounting Group Permissions

You can specify the access that Civic Platform users have for Time Accounting Types within a group. For example, agencies can allow certain users to view Time Accounting type information, but not to edit the information. Permissions set for individual users override permissions set for the group. For example, if the user has "Full" access, but the user group the user belongs to is "None," the user still has full access to view and update the Time Accounting group or type in the Time Accounting portlet.

Each of these users or user groups can have a different level of access:

Full	Civic Platform users in this group can access and edit all Time Accounting types in this group. Full Access is the default access mode. Unless you change the access level for a Time Accounting group, all users have Full permission to view and to edit applications related to that group.
Read	Civic Platform users in this group can view and create new records, but cannot edit or delete the record after they save it.
None	Civic Platform users cannot access the Time Accounting types in this group.

You can manage user profiles and user groups in Civic Platform. For information on adding or editing a user profile, see [Configuring Organizations, Departments, and Users](#).

There are three user levels available in Time Accounting: administrator, supervisor, and user. Users with administrator privileges can view and edit any records for which any other user has access. Supervisors can view and edit any records within their user group. Users can only view or edit their own records. The Access Mode column enables you to inform the current user what type of access you have enabled for each time entry type. Valid values are:

N	User cannot delete or make changes to the entry.
D	User can delete this entry.
E	Users can make changes to any of the fields, unless they are read-only.
DE	The user can delete this entry or make changes to any of the fields that are not read-only.

Topics

- [Assigning Time Accounting Group Permissions](#)
- [Removing Time Accounting Group Permissions](#)

Assigning Time Accounting Group Permissions

Agency users can select one or more users or user groups to assign to a Time Entry Group.

To assign Time Accounting group permissions

1. Access the Time Accounting Group portlet ([Navigating to the Setup Portlet](#)).
2. Create a new Time Accounting group, or select an existing group.
For instructions on how to create a new Time Accounting group, see [Creating a Time Accounting Group](#).
For instructions on how to search for an existing Time Accounting group, see [Searching for a Time Accounting Group](#).
3. Click the **Permissions** tab.
Civic Platform displays the Time Accounting Permissions tab.
4. Click **Assign**.
Civic Platform displays a navigation tree of all User Groups set up within the agency.



5. Search for the desired User ID or User Group in one of two ways:

- Click **Search** and enter the User ID or User Group name.

If Civic Platform finds a match, the navigation tree expands to show the results highlighted in red.



- Scroll through the navigation tree of User Groups and drill down to locate individual users.

6. Select the User Group or User ID you want to add to the Time Accounting group.

7. Click **Submit**.

Civic Platform displays an updated list of users on the Permissions tab.

8. Select the user access level in the Access field and then click **Submit**.

The screenshot shows the 'Time Accounting Group: Building Permit' portlet. At the top, there are buttons for 'Menu', 'Assign', 'Submit', 'Delete', and 'Help'. Below these are tabs for 'Detail', 'Permissions', and 'Time Accounting Types', with 'Permissions' being the active tab. A message '1 record(s) added successfully.' is displayed in red. The main area is a table with columns: Type, Module, Name, and Access. The data is as follows:

Type	Module	Name	Access
Group	Building	BuildingInspectorDemo	Full
Group	Building	BuildingAdmin	Full
Staff		ADMIN	Full
Staff		CHUGHES	Full

Removing Time Accounting Group Permissions

Agency users can remove permissions for groups that no longer apply to the Time Accounting group.

To remove Time Accounting group permissions

1. Access the Time Accounting Group portlet ([Navigating to the Setup Portlet](#)).
2. Create a new Time Accounting group, or select an existing group.
For instructions on how to create a new Time Accounting group, see [Creating a Time Accounting Group](#).
For instructions on how to search for an existing Time Accounting group, see [Searching for a Time Accounting Group](#).
3. Click the **Permissions** tab.
Civic Platform displays the Time Accounting Permissions tab.
4. Select the user group or the individual user you want to remove from the Time Accounting group.
5. Click **Delete**.

Managing Time Accounting Types

A Time Accounting type is the application that the user is recording time for, such as an electrical inspection. When users enter time, the options available depend on group permissions, profile settings, and the record type or application type for which the user is entering time. You can define Time Accounting types for use in any application type. Agency users can associate one Time Accounting type with multiple groups.

You also assign the level of access that any Civic Platform user or user group has to any particular Time Accounting type.

Topics

- [Searching for a Time Accounting Type](#)
- [Editing a Time Accounting Group](#)
- [Cloning a Time Accounting Type](#)

- [Deleting a Time Accounting Type](#)
- [Managing Time Accounting Type Permissions](#)
- [Managing Time Accounting Types within a Group](#)

Creating a Time Accounting Type

Users can create a new Time Accounting type.


Note:

Civic Platform does not allow duplicate entries. This implies that another record exists that has the same Time Entry Type Name, Group, Type, Sub Type, and Category. If you enter a duplicate, the following message displays, "The Time Accounting Type or Record Type entered already exists."

To create a new Time Accounting Type

1. Access the Time Accounting Types Maintenance portlet ([Navigating to the Setup Portlet](#)).
2. Click **New**.

Civic Platform displays the New Time Accounting Type page in the detail portlet.

The screenshot shows the 'New Time Accounting Type' detail portlet. At the top are buttons for Menu, Submit, Reset, and Help. Below are several input fields and pickers. The 'Usage' field is set to 'Record'. The 'Name' field is empty. The 'Time Accounting Group' field contains a picker with items: Building Permit, Building remodel, demo1, and Electrical Permit. The 'Hourly Rate' field is empty. The 'Percentage Adjustment' field is also empty. The 'Record Type' field is empty. The 'Detailed Description' field is empty. The 'Billable' field is set to 'Yes'. The 'Active' field is set to 'Yes'. The 'Record By' field is set to 'ADMIN'.

3. Enter the new Time Accounting type information in the necessary fields.

For a list of Time Accounting Type fields, see [Table 167: Time Accounting Type Detail Fields](#).

4. Click **Save**.

5. Assign user or user group permissions.

For more information about Time Accounting Type permissions, see [Managing Time Accounting Type Permissions](#).

Table 167: Time Accounting Type Detail Fields

Active	Select whether this type is Active or Inactive.
Billable	Select whether the agency can bill for this type. The default status is "Yes."
Record Type	Use the picker to select the Record Type, Sub Type, and Category. Users can select any level of the navigation tree. For example, if you select the Building group, the type displays as Building\ALL\ALL\ALL. If you select N/A in the Usage field, this field automatically locks at "ALL" and you cannot make any other selections.
Detailed Description	Enter a description for this type.

Hourly Rate	Enter the rate per hour for this type. The Hour Rate can be zero, or any positive or negative value. This field must remain at zero if the user enters a value in the Percentage Adjustment field.
Name	Enter a name for this Time Accounting type. Name is a required field.
Percentage Adjustment	Enter the percentage adjustment for this type. For example, 1.25 equals 125%. The Percentage rate can be zero or any negative or positive value. This field must remain at zero if the user enters a value in the Hourly Rate field.
Record By	This field displays the user who last updated the record. This field auto-populates.
Record Date	This field displays last record update date. This field auto-populates.
Time Accounting Group	This field displays all active Time Accounting groups.
Usage	Select either Record or N/A record type in the drop-down list. The default is Record, and indicates the Time Accounting type is mandatory to process the application. N/A indicates that the type has no relationship to a specific application. If you select N/A, the Record Type fields Group, Type, Sub Type, and Category locks at "ALL," and you cannot make any other selections.

Searching for a Time Accounting Type

Users must search for an existing Time Accounting type before the user can edit or clone a type.

To search for a Time Accounting type

1. Access the Time Accounting Types Maintenance portlet ([Navigating to the Setup Portlet](#)).

2. Click **Search**.

Civic Platform displays the Time Accounting Type - Search page.

3. Enter search criteria for the type you want.

For a list of Time Accounting type fields, see [Table 167: Time Accounting Type Detail Fields](#).

4. Click **Submit**.

Civic Platform displays the types that match the search criteria.

5. If more than one type fits the criteria, click the name of the type you want, or try searching again with more information.

Editing a Time Accounting Type

Users can edit some of the values for a Time Accounting type.

To edit a Time Accounting type

1. Access the Time Accounting Types Maintenance portlet ([Navigating to the Setup Portlet](#)).

2. Locate the Time Accounting type you want to edit.

For instructions on how to search for an existing Time Accounting type, see [Searching for a Time Accounting Type](#).

3. Update the desired fields.

For a list of Time Accounting type fields, see [Table 167: Time Accounting Type Detail Fields](#).

4. Click **Save**.

5. Update user or user group permissions.

For more information about Time Accounting Type permissions, see [Managing Time Accounting Type Permissions](#).

Cloning a Time Accounting Type

The Clone option is similar to the New option, except that the fields in the detail portlet populate with the values of the Time Accounting type you are cloning. The Clone operation saves the user time and reduces the amount of data users must enter when creating Time Accounting types that have the same name but apply to different application types. Permissions, N/A Types and Record Types transfer from the existing to the cloned type when you configure the Permission option under the Includes section of the Cloned Time Accounting Type detail page. Users can only clone one type at a time.

To clone a Time Accounting type

1. Access the Time Accounting Types Maintenance portlet ([Navigating to the Setup Portlet](#)).

2. Select the Time Accounting type you want to clone.

For instructions on how to search for an existing Time Accounting type, see [Searching for a Time Accounting Type](#).

3. Click **Clone**.

Civic Platform displays the Clone Time Accounting Type in the detail portlet.

Clone Time Accounting Type: Flush		
<input type="button" value="Menu"/> <input type="button" value="Submit"/> <input type="button" value="Reset"/> <input type="button" value="Help"/>		
<input type="button" value="Detail"/> <input type="button" value="Permissions"/>		
Usage * <input type="button" value="Record"/>	Name * <input type="text"/>	Time Accounting Group * <input type="checkbox"/> Building Permit <input type="checkbox"/> Building remodel <input type="checkbox"/> demo1 <input type="checkbox"/> Electrical Permit
Record Type * <input type="text" value="AMS/Water/Hydrant/All"/>	Hourly Rate * <input type="text" value="20"/>	Percentage Adjustment * <input type="text" value="0"/>
Record Date <input type="text" value="11/10/2010"/>	Record By <input type="text" value="ADMIN"/>	Detailed Description <input type="text"/>
Billable * <input type="button" value="Yes"/>	Active <input type="button" value="Yes"/>	Includes <input type="checkbox"/> Permission

4. Update the desired fields.

For a list of Time Accounting type fields, see [Table 167: Time Accounting Type Detail Fields](#).

To clone user Permissions, select Permission in the Includes section.

5. Click **Submit**.

6. Assign user or user group permissions.

For more information about Time Accounting Type permissions, see [Managing Time Accounting Type Permissions](#).

Deleting a Time Accounting Type

Agency users can delete one or more Time Accounting types at one time.



Note:

You cannot delete Time Accounting types associated with Time Accounting records or Time Accounting profiles.

To delete a Time Accounting type

1. Access the Time Accounting Types Maintenance portlet ([Navigating to the Setup Portlet](#)).
2. Select the Time Accounting type(s) you want to delete.
3. Click **Delete**.

Managing Time Accounting Type Permissions

You can assign user groups and individual users to Time Accounting types and assigned a level of access to the type. Use the permissions on the Time Accounting group level as the default permissions for each Time Accounting type. Agency users can assign additional permissions from the Time Accounting type portlet. For more information about Time Accounting group permissions, see [Managing Time Accounting Group Permissions](#).

User permissions include:

Full	Civic Platform user can access and edit the Time Accounting type. Full is the default access mode. Unless you change the access level for a Time Accounting type, all users have Full permission to view applications and edit applications related to that type.
Read	Civic Platform users in this group can view and create new records with this Time Accounting type, but cannot edit or delete the record they save it.
None	Civic Platform users cannot access the Time Accounting types.

Permissions set for individual users override permissions set for the group. For example, if the user has “Full” access, but the user group the user belongs to “None,” the user still has full access to view and update the Time Accounting group or type in the Time Accounting portlet.

Topics

- [Assigning Permissions to a Time Accounting Type](#)
- [Removing Permissions from a Time Accounting Type](#)

Assigning Permissions to a Time Accounting Type

If you associate the Time Accounting type with a Time Accounting group, the assignments and access level might already exist. You can update or assign additional user groups or individual users, as appropriate. For example, a group of home inspectors assigned to the Electrical Inspection type can have full permission to view and edit Time Accounting information for that type.

For more information about Time Accounting group permissions, see [Managing Time Accounting Group Permissions](#).

To assign Time Accounting group permissions

1. Access the Time Accounting Types Maintenance portlet ([Navigating to the Setup Portlet](#)).
2. Create a new Time Accounting type, or select an existing type.

For instructions on how to create a new Time Accounting type, see [Creating a Time Accounting Group](#).

For instructions on how to search for an existing Time Accounting type, see [Searching for a Time Accounting Type](#).

3. Click the **Permissions tab.**

Civic Platform displays the Time Accounting Permissions tab in the detail portlet.

Type	Module	Name	Access
Group	Building	BuildingAdmin	Full
Staff		HIKE	Full

4. Click **Assign.**

Civic Platform displays a navigation tree of all User Groups set up within the agency.

- User Group
 - + Building
 - + Enforcement
 - + Code Enforcement Inspector
 - + EnforcementAdmin
 - + EnforcementAdminDemo
 - + EnforcementManager
 - + EnforcementOperatorDemo
 - + Operators-Officers
 - + Permit Counter in Code Enforcement
 - + Violation Penalty Review
 - + Land
 - + Licenses
 - + AMS
 - + Planning
 - + ServiceRequest

5. Search for the desired User ID or User Group in one of two ways:

- Click **Search** and enter the User ID or User Group name.

Search for User ID or User Group:
User Group
OK **Cancel**

If Civic Platform finds a match, the navigation tree expands to show the results highlighted in red.

User Group navigation tree:

- Building
- Enforcement
 - Code Enforcement Inspector
 - EnforcementAdmin
 - ADMINISTRATOR
 - AIRMAN
 - ALEX
 - ANIL
 - ASMITH
 - BOWENS
 - CDUPAY
 - CHUGHES**
 - CSD_ADMIN
 - DBREWSTER
 - DCHEN
 - DDOUGLASS

- Scroll through the navigation tree of User Groups to locate individual users.
- Select the User Group or User ID you want to add to the Time Accounting group.
 - Click **Submit**.

Civic Platform displays an updated list of users on the Permissions tab.

- Select the user access level and then click **Submit**.

Time Accounting Type: Fire Inspection

Menu Assign Submit Delete Help

Detail Permissions

1 record(s) updated successfully.

Type	Module	Name	Access
Group	Building	BuildingAdmin	Full
Staff		CHUGHES	Full
Staff		HIKE	Full

Removing Permissions from a Time Accounting Type

Agency users can remove permissions for types that no longer apply to the Time Accounting type.

To remove Time Accounting group permissions

- Access the Time Accounting Types Maintenance portlet ([Navigating to the Setup Portlet](#)).
- Locate the Time Accounting types that contains the permission(s) you want to remove.
For instructions on how to search for an existing Time Accounting type, see [Searching for a Time Accounting Type](#).
- Click the **Permissions** tab.
Civic Platform displays the Time Accounting type Permissions tab.
- Select the user group or individual user you want to remove from the Time Accounting group.

5. Click **Delete**.

Managing Time Accounting Types within a Group

Agency users determine which Time Accounting types to associate with a Time Accounting group. For example, if the Time Accounting group was for Electrical Permits, the agency can associate all of the tasks required to issue an Electrical Permit with the Electrical Permits group.

For more information about Time Accounting Types, see [Managing Time Accounting Types](#).

Topics

- [Assigning Time Accounting Types](#)
- [Removing Time Accounting Types](#)

Assigning Time Accounting Types

Users can assign one or more Time Accounting types to a Time Accounting group.

To assign Time Accounting types to a Time Accounting group

1. Access the Time Accounting Group portlet ([Navigating to the Setup Portlet](#)).
2. Create a new Time Accounting group, or select an existing group.
For instructions on how to create a new Time Accounting group, see [Creating a Time Accounting Group](#).
For instructions on how to search for an existing Time Accounting group, see [Searching for a Time Accounting Group](#).
3. Click the **Time Accounting Types** tab.
Civic Platform displays the Time Accounting Types tab.

Usage	Name	Hourly Rate	Percentage Adjustment	Group	Type	Subtype
Record	inspection	100	0	Building	ACA	Demo
Record	Water Inspection	200	0	Building	Building Permit	All
Record	Electrical Inspection	100	0	Building	Building Permit	All

4. Click **Look Up**.
Civic Platform displays the Time Accounting Type: Search portlet.

5. Enter the search criteria in the available fields.
For a list of Time Accounting Type fields, see [Table 167: Time Accounting Type Detail Fields](#).
6. Click **Submit**.
Civic Platform displays all Time Accounting types that fit the search criteria.

7. Select the Time Accounting type(s) that you want to add to the group.
8. Click **Select**.

Removing Time Accounting Types

Agency users can remove Time Accounting types from a Time Accounting group when they no longer apply to the group.

To remove Time Accounting types from a Time Accounting group

1. Access the Time Accounting Group portlet ([Navigating to the Setup Portlet](#)).
2. Select the Time Accounting group that contains the type you want to remove.
For instructions on how to search for an existing Time Accounting group, see [Searching for a Time Accounting Group](#).
3. Click the **Time Accounting Types** tab.
Civic Platform displays the Time Accounting Types tab.
4. Select the type you want to remove.
5. Click **Delete**.

Managing Time Accounting User Profiles

Access to the Time Accounting Browser and the ability to perform time accounting data entry is controlled by the Civic Platform user's Time Accounting profile. You can assign these users permission levels within Time Accounting groups and types. For example, a group of home inspectors assigned to the Electrical Inspection type can have full permission to view and edit Time Accounting information for that type.

Topics

- [Searching for User Profiles](#)
- [Updating Time Accounting User Profiles](#)
- [Copying Time Accounting User Profiles](#)
- [Inactivating Time Accounting User Profiles](#)

Searching for User Profiles

Agency users can search for Civic Platform user profiles to give access to the Time Accounting feature or update profile information. To create a new user Time Accounting profile, see [Creating a Time Accounting User Profile](#).

Agency users can only edit user profile information related to Time Accounting in this portlet. If you want to create a new user profile, or edit profile information other than Time Accounting information, see [Configuring Organizations, Departments, and Users](#).

To search for user profiles

1. Access the Time Accounting Profiles portlet ([Navigating to the Setup Portlet](#)).
2. Click **Search**.
Civic Platform displays the User Time Accounting Profiles - Search page.

3. Enter the information you are searching for into one or more of the search fields.

For a list of Time Accounting user profile search fields, see [Table 168: Time Accounting User Profile Fields](#).

4. Click **Submit**.

Civic Platform displays all of the user profiles that match the search criteria.

5. If more than one type fits the criteria, click the name of the type you want, or try searching again with more information.

Updating Time Accounting User Profiles

The agency user can add or maintain a Time Accounting profile. When you select a user that does not have a Time Accounting profile, the profile details initialize to the default value, and the edit portlet automatically resets to New Profile mode. The user cannot access the Time Accounting Types tabs until you save the Time Accounting User Login ID. The agency user can add or update Time Accounting profile and Time Accounting type information.



Note:

Agency users can only edit user profile information related to Time Accounting in this portlet. If you want to create a new user profile, or edit profile information that other than Time Accounting, see [Configuring Organizations, Departments, and Users](#).

Topics

- [Creating a Time Accounting User Profile](#)
- [Editing a Time Accounting User Profile](#)
- [Managing Time Accounting Types Related to User Profiles](#)

Creating a Time Accounting User Profile

Before you can define Time Accounting types, you must first create user profiles.

You can only edit user profile information related to Time Accounting in this portlet. If you want to create a new user profile, or edit profile information other than Time Accounting, see [Configuring Organizations, Departments, and Users](#).

To create a new Time Accounting user profile

1. Access the Time Accounting Profiles portlet ([Navigating to the Setup Portlet](#)).

2. Search for the Civic Platform user profile.

For instructions on searching for a Civic Platform user profile, see [Searching for User Profiles](#).

Civic Platform displays the Time Accounting Profile in the detail portlet.

3. Enter the User Login ID and all other relevant fields.

For a list of Time Accounting user profile fields, see [Table 168: Time Accounting User Profile Fields](#).

4. Click **Save**.

5. Add associated Time Accounting types.

For more information on adding or editing Time Accounting types from the user Time Accounting profile, see [Managing Time Accounting Types Related to User Profiles](#).

Table 168: Time Accounting User Profile Fields

Active	Select Yes or No to indicate whether the user's Time Accounting profile is active.
Hourly Rate	Enter the rate per hour for this user. The Hour Rate can be zero, or any positive or negative value.
May Delete Other User's Time Accounting	<p>Select an option from the drop-down list to determine whether the user has Supervisor or Administrator access to delete another user's Time Accounting entries. The options in this list include No, Supervisor, and Administrator.</p> <p>If you select No the user does not have access to delete another user's entries.</p> <p>If you select Supervisor, the user can delete Time Accounting entries entered by a user in the Supervisor's user group. Civic Platform does not restrict this option by the Number of Days That Delete Is Allowed field.</p> <p>If you select Administrator, the user can delete Time Accounting entered by any other user. Civic Platform does not restrict this option by the Number of Days That Delete Is Allowed field.</p>
May Enter Materials and Cost	<p>Select Hidden, Yes, or No from the drop-down list to indicate whether the user can enter materials and cost information in Time Accounting entries. If you select Hidden the user cannot view or enter data into this field. If you select No the field is read-only.</p> <p>Note: If you configure the Standard Choice TIME_ACCOUNTING_SETTINGS, you can select Hidden for this field, so that all users add material and cost information in the Equipment/Materials section of the time accounting entry form.</p>
May Enter Start/Stop/Elapsed Time	Select Yes or Elapsed Time Only from the drop-down list to indicate whether the user can enter the time in all three fields. If you select Yes, the user can enter the time in the Start, End, and Elapsed Time fields, and the application validates that the elapsed time equals the difference between the start and end time. If you select Elapsed Time Only, the Start Time and End Time fields are read-only.

May Enter Time Accounting	Select Yes or No from the drop-down list to indicate whether the user can enter Time Accounting entries. Users that do not have rights to enter their own time accounting entries can still have Supervisor or Administrator rights to browse and modify other entries, and generate reports.
May Enter Vehicle and Mileage	Select Hidden, Yes, or No from the drop-down list to indicate whether the user can enter vehicle information and mileage information in Time Accounting entries. If you select Hidden the user cannot view or enter data into this field. If you select No the field is read-only.
	<p> Note: If you configure the Standard Choice TIME_ACCOUNTING_SETTINGS, you can select Hidden for this field, so that all users add vehicle and mileage information in the Equipment/Materials section of the time accounting entry form.</p>
May Lock Other User's Time Accounting	Select an option from the drop-down list to indicate whether the user has Supervisor or Administrator access to modify the details of another user's Time Accounting entries. Administrator and Supervisor roles can edit locked entries, and they can lock or unlock time accounting records. The specific functions on these roles display here.
May Modify Billable Flag	Select Yes or No from the drop-down list to indicate whether the user can modify the billable when entering Time Accounting entries. If you select No the billable flag is read-only. No is the default setting. If you select Yes the user can make updates and automatically populate the record from the Time Accounting type configuration.
May Modify Log Time Accounting Date	Select Yes or No in the drop-down list to indicate whether the user can modify the date the user enters Time Accounting entries. If you select No, Civic Platform automatically populates the entry date.
May Add/Modify Other User's Time Accounting	<p>Select an option from the drop-down list to indicate whether the user has Supervisor or Administrator access to add or modify the details of another user's time accounting entries. The fields this setting grants update access to are: Time Accounting Type, Logged Date, Start Time, End Time, Elapsed Time, Billable Flag, Materials and Cost of Materials, Vehicle Information and Mileage, and Notation.</p> <p>If you select No, the user cannot add or modify other users' time account records. If you select Supervisor, the user can add time accounting records for users that belong to the same user group, and modify their time accounting records. Civic Platform does not restrict this option by the Number of Days That Update Is Allowed field. If you select Administrator, the user can add time accounting records for any other users, and modify any time accounting record. Civic Platform does not restrict this option by the Number of Days That Update Is Allowed field.</p>
May Modify Rates and Cost	<p>Select an option from the drop-down list to indicate whether the user can modify rates and cost information in Time Accounting entries. The options in this list include Hidden, No, Yes, Supervisor, and Administrator. If you select Hidden the user cannot view or enter data into the Rates and Costs fields. If you select No the field is read-only.</p> <p>If you select Yes the setting is only valid until the age of the current entry exceeds the number of days specified in the Number of Days That Update Is Allowed field.</p> <p>If you select Supervisor, the user can modify the hourly rate and the percentage adjustment of their own Time Accounting entries, as well as those entered by a user in the Supervisor's user group. Civic Platform does not restrict this option by the Number of Days That Update Is Allowed field.</p> <p>If you select Administrator, users can modify their hourly rate and their percentage adjustment for their own Time Accounting entries, as well as those entered by any other user. Civic Platform does not restrict this option by the Number of Days That Update Is Allowed field.</p>

May See Other User's Time Accounting	Select Yes or No from the drop-down list to indicate whether the user, such as a Supervisor or Administrator, can view Time Accounting entries assigned to other users.
Number of Days That Delete is Allowed	The number of days defaults to 999 which indicate that the user can delete his/her own entries any time. A value of 0 indicates that the user can never delete an entry after they write it to the database. A value of 1 - 998 indicates the number of days a user has permission to delete an entry. After the specified number of days has passed the entry becomes archived and the user can no longer delete it. You can configure Time Accounting Supervisors and/or Administrator rights to override this date and delete any entry, for any user, at any time.
Number of Days That Update is Allowed	The number of days defaults to 999 which indicate that the user can update his/her own entries any time. A value of 0 indicates that the user can never update an entry after they write it to the database. A value of 1 - 998 indicates the number of days a user has permission to update an entry. After the specified number of days has passed entries become archived and the user can no longer update them. You can configure Time Accounting Supervisor and/or Administrator rights to override this date and update any entry, for any user, at any time.
Time Accounting Group	This drop-down list displays all Time Entry Groups in Civic Platform includes an option ALL Groups and all other Time Entry Groups with a record status= 'A' (active). User can select as many Time Accounting Groups as they have permissions for.
Time Accounting Types	Select whether the user can access All Time Accounting Types, or only Specified Time Accounting Types drop the drop-down list. If you set Specified Time Accounting Types, the Look Up button displays on N/A Types and Record Types tabs and populates all active types automatically selected for the group. If you set All Time Accounting Types, the Look Up button disappears and populates all active types assigned to the selected Time Accounting group.
Record By	This field displays the user who created the record. This field auto-populates.
Record Date	This field displays the date a user created the record. This field auto-populates.
User ID	The user's login identification. Use the picker to get the user ID by department.
User Name	The user's full name.

Editing a Time Accounting User Profile

Agency users can update a Civic Platform user's Time Accounting profile and associated Time Accounting Types at any time. Agency users can only edit user profile information related to Time Accounting in this portlet. If you want to create a new user profile, or edit profile information other than Time Accounting, see [Configuring Organizations, Departments, and Users](#).

To update Time Accounting user details

1. Access the Time Accounting Profiles portlet ([Navigating to the Setup Portlet](#)).

2. Search for the Civic Platform user profile.

For instructions on searching for a Civic Platform user profile, see [Searching for User Profiles](#).

Civic Platform displays the Time Accounting Profile in the detail portlet

3. Update the detail fields as necessary.

For a list of Time Accounting user profile fields, see [Table 168: Time Accounting User Profile Fields](#).

4. Click **Save**.

Managing Time Accounting Types Related to User Profiles

A Time Accounting type is the application that the user is recording time for, such as an electrical inspection. Agency users can associate Time Accounting types to user groups or individual users as needed.

There are two different usage classifications for Time Accounting Types: Record Types and N/A Types. Civic Platform uses Record Types to process applications. As the employees log their activity in Time Accounting, the agency can calculate the fees and charges and apply them to the application in realtime. For example, an agency can track the time a user spends on a particular process or group of processes. N/A Types do not directly relate to processing any specific information. This information is for reporting purposes only.

For more information about Time Accounting Types, see [Managing Time Accounting Types](#).

Topics

- [Adding Time Accounting Types to a User Profile](#)
- [Editing Time Accounting Types for a User Profile](#)

Adding Time Accounting Types to a User Profile

Agency users can associate Time Accounting types with a user profile from the User Profile portlet.

You can add Time Accounting types to a user profile by user group through the Time Accounting Group or Time Accounting Type portlet. For more information, see [Managing Time Accounting Group Permissions](#) or [Managing Time Accounting Type Permissions](#).

To associate a Time Accounting type with a user profile

1. Access the Time Accounting Profiles portlet ([Navigating to the Setup Portlet](#)).
2. Search for the Civic Platform user profile.
For instructions on searching for a Civic Platform user profile, see [Searching for User Profiles](#).
Civic Platform displays the Time Accounting Profile in the detail portlet.
3. Click the **N/A Types** or **Record Types** tab.
Civic Platform displays the desired Types tab in the detail portlet.

Time Accounting Profile: ADOTTAVIO							
Profile		N/A Types (0)	Record Types (8)				
Type Name	Group/Type/SubType/Category	Hourly Rate	(Source)	Percentage Adjustment	(Source)	Active	
Flush	AMS/Water/Hydrant/All	20.00	(Time Type)	0.00	(Time Type)	Yes	
Install	AMS/Water/Hydrant/All	20.00	(Time Type)	0.00	(Time Type)	Yes	
inspection	Building/ACA/Demo/Demo	100.00	(Time Type)	0.00	(Time Type)	Yes	
timeTypeTest1	Building/ACA/Demo/Demo	200.00	(Time Type)	0.00	(Time Type)	Yes	
Fire Inspection	Building/Building Permit/All/All	10.00	(Time Type)	0.00	(Time Type)	Yes	
Water Inspection	Building/Building Permit/All/All	200.00	(Time Type)	0.00	(Time Type)	Yes	
Electrical Inspection	Building/Building Permit/All/All	100.00	(Time Type)	0.00	(Time Type)	Yes	
Other Inspections	Building/Building Permit/All/All	150.00	(Time Type)	0.00	(Time Type)	Yes	

4. Click **Look Up**.

Civic Platform displays the Time Accounting Type: Search page in the detail portlet.

5. Enter the search criteria for the type you want to locate.

For a list of Time Accounting type fields, see [Table 167: Time Accounting Type Detail Fields](#).

6. Click **Submit**.

Civic Platform displays the types that match the search criteria.

7. If more than one type fits the criteria, click the name of the group you want, or try searching again with more detailed search criteria.

8. Select the Time Accounting type or types you want to associate with the user Time Accounting profile.

9. Click **Select**.

Civic Platform adds the selected Time Accounting types to the associated Record Type list in the detail portlet.

Editing Time Accounting Types for a User Profile

Agency users can adjust the cost for a Time Accounting type to fit a user's unique profile. For example, a home inspector can require a higher inspection rate for residential properties located on an island because he has to pay bridge toll fees.

To edit Time Accounting types within a user profile

1. Access the Time Accounting Profiles portlet ([Navigating to the Setup Portlet](#)).

2. Search for the Civic Platform user profile.

For instructions on searching for a Civic Platform user profile, see [Searching for User Profiles](#).

Civic Platform displays the Time Accounting Profile in the detail portlet.

3. Click the **N/A Types** or **Record Types** tab.

Civic Platform displays the desired Types tab in the detail portlet.

4. Click the Time Accounting type you want to edit.

Civic Platform displays the Record Type rate adjustment page in the detail portlet.

Time Accounting Profile: ADOTTAVIO

Save Reset Cancel Help

Profile N/A Types (0) Record Types (8)

Override: Flush / AMS/Water/Hydrant/All

<input checked="" type="radio"/> Default (No Override)	<input type="radio"/> (Override) Use Billing Rate	<input type="radio"/> (Override) Use Profile Hourly Rate
Hourly Rate {0}	Hourly Rate	Hourly Rate
20	0	0
Percentage Adjustment {0}		
0		
<input type="radio"/> User Override Rate/Pct	<input type="radio"/> (Override) Use Time Type Rate/Pct	
Hourly Rate	Hourly Rate	
0	20	
Percentage Adjustment	Percentage Adjustment	
0	0	

5. Select the rate type you want to use.

For a description of the rate types, see [Table 167: Time Accounting Type Detail Fields](#), or [Table 168: Time Accounting User Profile Fields](#).

6. Click **Save**.

Copying Time Accounting User Profiles

The Clone operation copies key profile information and the Time Accounting types from an existing Time Accounting user profile into a new profile. Cloning saves time and reduces the amount of data you must enter when creating a Time Accounting Profile.

Agency users can only edit user profile information related to Time Accounting in this portlet. If you want to create a new user profile, or edit profile information other than Time Accounting, see [Configuring Organizations, Departments, and Users](#).

To clone a user Time Accounting profile

- Access the Time Accounting Profiles portlet ([Navigating to the Setup Portlet](#)).
- Search for the Civic Platform user profile.
For instructions on searching for a Civic Platform user profile, see [Searching for User Profiles](#).
Civic Platform displays the User Time Accounting Profiles list.
- Select the profile you want to clone. You can only clone one user Time Accounting profile at a time.
- Click **Copy**.

Civic Platform displays a the Copy Time Accounting Profile page in the detail portlet.

Time Accounting Profile: ADOTTAVIO

Menu Save Reset Help

Profile N/A Types (0) Record Types (8)

User Name Andrew D'ottavio	User Login ID ADOTTAVIO	May Enter Time Accounting <input checked="" type="checkbox"/> Yes
Time Accounting Group * ALL Groups	Time Accounting Types * All Time Accounting Types	Active <input checked="" type="checkbox"/> Yes
Number of Days That Delete is Allowed * 999	Number of Days That Update is Allowed * 999	Record Date 12/30/2008
Record By ADOTTAVIO	Hourly Rate 0.0	May Modify the Logged Date <input checked="" type="checkbox"/> Yes
May Enter Start/End/Elapsed Time <input checked="" type="checkbox"/> Yes	May Modify Billable Flag <input checked="" type="checkbox"/> Yes	May Enter Materials And Cost <input checked="" type="checkbox"/> Hidden
May Enter Vehicle and Mileage <input checked="" type="checkbox"/> Yes	May See Other User's Time Accounting <input checked="" type="checkbox"/> Yes	May Modify Rates and Cost <input checked="" type="checkbox"/> Hidden
May Add/Modify Other User's Time Accounting Administrator	May Delete Other User's Time Accounting Administrator	User as Resource <input type="checkbox"/>
May Lock Other User's Time Accounting <input checked="" type="checkbox"/> No		

5. Select the User Login ID from the drop-down list.

6. Enter information in the rest of the fields as needed.

For a list of user profile fields, see [Table 168: Time Accounting User Profile Fields](#).

7. Update the Time Application types as needed.

For instructions on adding or editing Time Accounting types, see [Managing Time Accounting Types Related to User Profiles](#).

8. Click **Submit**.

Inactivating Time Accounting User Profiles

Agency users can deactivate Time Accounting profiles for Civic Platform users at any time. Agency users can only edit user profile information related to Time Accounting in this portlet. If you want to edit or delete profile information other than Time Accounting, see [Configuring Organizations, Departments, and Users](#).

To deactivate a Time Accounting user profile

1. Access the Time Accounting Profiles portlet ([Navigating to the Setup Portlet](#)).

2. Search for the Civic Platform user profile.

For instructions on searching for a Civic Platform user profile, see [Searching for User Profiles](#).

Civic Platform displays the User Time Accounting Profiles list.

3. Complete one of the following options.

- Select the profile(s) you want to deactivate, and then click **Delete**.
- Open the user profile you want to deactivate. In the Profile record tab in the detail portlet, select **No** in the Active field. Click **Save**.



Note:

If you select a user who does not have an active Time Accounting profile, the delete feature has no effect on that profile.

Configuring Access to Inspections and Workflow

Understanding Inspection Detail and Workflow User Pages

In the Time Accounting portlet, only owners have the right to create their time accounting entries. If administrators or supervisors, configured in Time Accounting profiles, want to create another user's time accounting entries, they can do it in the Time Accounting section of the Inspection Detail and Workflow detail page.

Inspection administrators, workflow administrators, time accounting administrators and time accounting supervisors have different permissions in the new Time Accounting section.

Inspection administrators have full permissions for the standard inspection fields, but no permissions for the new Time Accounting fields.

Workflow administrators have full permissions for the standard workflow task fields, but no permissions for the new Time Accounting fields.

Time Accounting Administrator/Supervisor has full permission for the new Time Accounting fields in both inspection detail and in workflow pages.

Locking Time Accounting for Another User

The locking feature is available for assigning rights to time accounting administrators and time accounting supervisors to lock other user's time accounting; they can run a batch job to lock all Time Accounting records. To run a batch job, see [Working with Batch Jobs](#).

Time accounting administrators and time accounting supervisors can lock other user's time entries and can edit the entries. During the locking period, the owner cannot update the locked time accounting. Each time accounting entry has a Lock Status field so a user can set the status to locked or unlocked.

To set time accounting locking for a user profile

1. Access the Time Accounting Profiles portlet ([Accessing the Time Accounting Profiles Portlet](#)).
2. Select a user from the User Time Accounting Profiles list.
3. Select **No, Supervisor, or Administrator** from the drop-down list.

No – The user has no right to lock other user's time accounting.

Supervisor – The user can lock the time accounting entries of a user in the same user group.

Administrator – The user can lock the time accounting entries of any other user.

The screenshot shows the 'Time Accounting Profile: ADOTTAVIO' configuration page. At the top, there are buttons for 'Menu', 'Save', 'Reset', and 'Help'. Below that, tabs for 'Profile', 'N/A Types (0)', and 'Record Types (8)' are visible. The main area contains various configuration fields:

- User Name:** Andrew DOttavio
- Time Accounting Group:** ALL Groups
- Number of Days That Delete is Allowed:** 999
- Record By:** ADOTTAVIO
- May Enter Start/End/Elapsed Time:** Yes
- May Enter Vehicle and Mileage:** Yes
- May Add/Modify Other User's Time Accounting:** Administrator
- May Lock Other User's Time Accounting:** No (highlighted with a red border)
- User Login ID:** ADOTTAVIO
- Time Accounting Types:** All Time Accounting Types
- Number of Days That Update is Allowed:** 999
- Hourly Rate:** 0.0
- May Modify Billable Flag:** Yes
- May See Other User's Time Accounting:** Yes
- May Delete Other User's Time Accounting:** Administrator
- May Enter Time Accounting:** Yes (Active)
- Record Date:** 12/30/2008
- May Modify the Logged Date:** Yes
- May Enter Materials And Cost:** Hidden
- May Modify Rates and Cost:** Hidden
- User as Resource:** (checkbox)

Part 8: Land Management

Civic Platform provides functions specific to a land management solution.

Related Information

[Managing Property: Addresses, Parcels, and Owners](#)

[Structures and Establishments](#)

[Inspections](#)

Managing Property: Addresses, Parcels, and Owners

Property includes all of the address, parcel, and owner (APO) information that users can associate with records:

- Addresses are physical locations within parcels.
- Parcels are an area of land that has a specific location and legally defined boundaries. A parcel can have multiple addresses.
- Owners are associated with specific parcels; they are often responsible for their parcels and can serve as a point of contact.

You store APO data in your Civic Platform database as reference data. Reference data is reusable content that you can add to records without having to recreate the content for each record. For example, an administrator creates a parcel record, with information on the location and size of the parcel. This information is reference data. When a user creates an application to build a house on the parcel, the information contained in the parcel record is reusable within the application.

When users add APO reference data to a record, they select an existing address, parcel, or owner from a list. The APO reference data resides in your agency's database. Users do not need to enter any new information. If users edit or remove the APO reference data associated with a record, the change only affects the current record. The original information in the database remains unchanged.

You can also manually add new property information to a record by filling out a set of forms. New property data remains solely with the record; it does not automatically update to the reference database.

Click a topic title below for full details.

Related Information

[Configuring APO Functionality](#)

[Working with Reference Data](#)

[Maintaining APO Templates](#)

Configuring APO Functionality

You can configure the address, parcel, and owner (APO) portlets in Civic Platform according to your agency's best practices.

After you configure how you want to handle APO transactions in Civic Platform, users can add, edit, split, merge, and copy or move parcel associations, according to your agency's objectives.

Refer to the Accela Civic Platform User Guide for full details on establishing parcel genealogy, splitting, and merging parcels.

Topics

- [Configuring FIDs and Standard Choices](#)
- [Configuring APO Form Fields](#)
- [Mapping GIS Attribute Fields to Parcel Fields](#)

Configuring FIDs and Standard Choices

Refer to the Civic Platform Configuration Reference, "Address, Parcel, Owner (APO)" section for complete details on the FIDs and Standard choices you must configure to enable their functionality in Civic Platform.

You can configure your system to synchronize parcel information associated to addresses and owners you add or remove from a permit record. When you associate a parcel to an address, if you add or remove that address from a permit record, the parcel information can populate the record as well, either automatically or following a message prompt. For information on configuring reference data synchronization, see APOSE_SYNCHRONIZE in the *Accela Civic Platform Configuration Reference*.

Configuring APO Form Fields

The following tables represent the fields available on the tabs of the address, parcel, and owner (APO) portlets. You can choose to include or exclude any of these fields, based on your agency's needs and preferences. You can set user access levels and specify which fields are required and which are optional.

For instructions on configuring the fields, refer to [Designing Forms for Portlets](#).

- [Address Fields](#)
- [Address Search Fields](#)
- [Parcel Fields](#)
- [Table 172: Parcel Search Fields](#)
- [Owner Fields](#)
- [New Attachment Form Fields](#)

Address Fields

Table 169: Address Fields

Street # (Start)	In combination with the Street # (End) field, use this field to specify the street number for this address. Use the Fraction drop-down list to include fractional street numbers such as "1/2."
Street # (End)	In combination with the Street # (Start) field, use this field to specify the street number. Use the Fraction drop-down list to include fractional street numbers such as "1/2."
Unit # (Start)	In combination with the Unit # (End) field, use this field to specify a range of unit numbers for this address.
Unit # (End)	In combination with the Unit # (Start) field, use this field to specify a range of unit numbers for this address.
Unit Type	Choose a unit type such as Apt. or Suite.
Direction	Use this drop-down list to indicate a street direction. For example, choose "N" to indicate a north direction. This usually indicates the directional area of a city or street, such as "North Broadway."
Street Name	Enter the street name.
Suffix	Use this drop-down list to choose a street type such as "Lane" or "Boulevard."
City	Enter the city name or click Get City to choose a standardized city name.
State	Use this drop-down list to choose the state name.
Zip	Enter the ZIP code. Because this is a free-text field, you can include a four-digit extension. For example, enter 84070-2431.
County	Enter the county to which the address belongs.

Country	Enter the country to which the address pertains.
Address Description	Enter a description of the address.
X Coordinate	Enter the latitudinal coordinate for the parcel.
Y Coordinate	Enter the longitudinal coordinate for the parcel.
Primary Address	You can indicate the primary address of a parcel when you edit the parcel.
Status	If you want to make the address available in Civic Platform, select Enable ; otherwise, select Disable .

Address Search Fields

Table 170: Address Search Fields

Parcel #	Enter the parcel number.
Subdivision	If you have set this up, enter the name of the subdivision. If you have defined subdivisions, choose the subdivision from the drop-down list.
Lot	If you have set this up, enter the lot name. If you have defined lots based on subdivisions, choose the lot from the drop-down list.
Owner Name	Enter the name of the parcel owner.
Street # (Start)	Enter the starting street number.
Street # (End)	Enter the ending street number.
Street Direction	Use this drop-down list to indicate a street direction. For example, choose "N" to indicate a north direction. This usually indicates the directional area of a city or street, such as "North Broadway."
Street Name	Enter the name of the street.
Street Suffix	Use this drop-down list to choose a street type such as "Lane" or "Boulevard."
Unit # (Start)	Enter the starting unit number.
Unit # (End)	Enter the ending unit number.
City	Enter the city name or choose a standardized city name.
State	Use this drop-down list to choose the state name.
Zip Code	Enter the ZIP code. Because this is a free-text field, you can include a four-digit extension. For example, enter 84070-2431.
County	Enter the county to which the address belongs.
Country	Enter the country to which the address pertains.
Status	If you want to search for addresses available in Civic Platform, select Enable ; otherwise, select Disable .

Parcel Fields

Table 171: Parcel Fields

Parcel #	Enter the official parcel number as determined by the county assessor.
Section	Enter a section number to download any parcels in that section number.
Township	Enter a township number to download any parcels in that township number.
Range	Enter a range number to download any parcels in that range number.
Subdivision	If you have set this up, enter the name of the subdivision. If you have defined subdivisions, choose the subdivision from the drop-down list.

Lot	If you have set this up, enter the lot name. If you have defined lots based on subdivisions, choose the lot from the drop-down list. A block can contain one or more lots on a plot survey.
Block	Enter the name or the street number of the block associated with this application. A block is a rectangular space, surrounded by streets. A parcel can contain one or more blocks.
Tract	Enter the name of the tract associated with this application. A tract consists of contiguous parcels all with the same owner.
Area	Enter the total area of the parcel. Your agency determines the standard unit of measure, such as acres or square feet.
Census Tract	Enter the unique number assigned by the Census Bureau that identifies the tract to which this parcel belongs.
Book/Page/PARCEL	Use these three fields to enter a reference to the physical location of this parcel information in the County Assessor's or other responsible department's records.
Land Value	Enter the total value of the land within the parcel.
Exempt Value	Enter the total value of any tax exemptions that apply to the land within the parcel.
Improved Value	Enter the total value of any improvements to the land within the parcel.
Inspection District	Enter the inspection district to which the parcel belongs.
Supervisor District	Enter the supervisor district to which the parcel belongs.
Council District	Enter the council district to which the parcel belongs.
Map Reference	Enter the reference to where the map for this parcel exists, such as a map book.
Map #	Enter the unique map number that identifies the map for this parcel.
GIS Sequence #	Enter the ID number that you use to identify the parcel in Geographic Information Systems (GIS).
Plan Area	Enter the plan area in which the parcel belongs.
Legal Description	Enter the legal description of the parcel, the parcel bounds, or its characteristics. You can also include a reference to the official documents that contain this description.
Parcel status	If you want to make the parcel available in Civic Platform, select Enable ; otherwise, select Disable .
Primary Parcel	<p>When an application has more than one parcel associated with it and you need to designate a primary parcel, click Yes. For each application there can be only one primary parcel.</p> <p>If an application has only one parcel, Civic Platform automatically designates it as the primary parcel.</p> <p>To change the option from "No" to "Yes" you must first change the current primary parcel designation.</p> <p>In most other actions, the primary parcel setting information also applies. For example, when cloning or copying the application (Daily > Application > Copy Application) the parcel primary setting copies over to the new application.</p>

Parcel Search Fields

Table 172: Parcel Search Fields

Parcel #	Enter the official parcel number determined by the county assessor. Depending on the issuing department, the format of the parcel number can be different on different applications.
----------	--

Subdivision	If you have set this up, enter the name of the subdivision. If you have defined subdivisions, choose the subdivision from the drop-down list.
Lot	If you have set this up, enter the lot name. If you have defined lots based on subdivisions, choose the lot from the drop-down list.
Address: Street #	Enter a range of street numbers in the start field and end field.
Address: Direction	Enter the direction of the street. For example, enter "North."
Address: Street Name	Enter the name of a street.
Address: Suffix	Choose a street type such as "lane" or "boulevard."
Address: Unit #	Enter a range of units in the start field and end field.
Address: City	Enter a city name.
Status	Select the current mode of the parcel that you want to find. You can search for enabled, disabled, pending, or all items.
Primary Parcel	<p>Specify "All" to search every parcel in Civic Platform. This search option ignores if you define the parcel as the primary parcel or not on an application.</p> <p>Specify "Yes" to search for only primary parcels on an application. Specify "No" to search for parcels that are not the primary parcel on an application.</p>
Owner Name	Enter the name of the person, business, or organization that owns the parcel.
	 Note: Civic Platform supports fuzzy string searching on the field even if users does not enter the fuzzy search symbol (%).

Owner Fields

Table 173: Owner Fields

Owner Title	If applicable, enter the owner's title.
Full Name	Enter the owner's full name.  Note: Civic Platform supports fuzzy string searching on the field even if users does not enter the fuzzy search symbol (%).
Name (F/M/L)	Enter the first, middle, or last name of the owner.
Address	Enter the owner's street address.
City	Enter the city or click Get City to choose the city that corresponds with the owner's street address.
State	Choose the state that corresponds with the owner's street address.
Country	Enter the country that corresponds with the owner's street address.
ZIP code	Enter the ZIP code that corresponds with the owner's street address.
Phone #	Enter the owner's telephone number.
Fax #	Enter the owner's fax number.
Address	Enter the owner's mailing address.
City	Enter the city or click Get City to choose the city that corresponds with the owner's mailing address.
State	Choose the state that corresponds with the owner's mailing address.
Country	Enter the country that corresponds with the owner's mailing address.
ZIP code	Enter the ZIP code that corresponds with the owner's mailing address.

Tax ID #	Enter the owner's tax ID number.
Event ID #	Enter the ID number of the significant event related to the parcel.
Primary Owner	You can indicate the primary owner of a parcel when you edit the parcel.
Owner Status	If you want to make the owner available for searching in Civic Platform, select Enable ; otherwise, select Disable .

New Attachment Form Fields

Table 174: New Attachment Form Fields

Document Description	Enter a brief description of the document.
Document Group/Category	Select the document group and document category for the file. When selecting a document group, the category field drop-down list changes to provide list items for the selected document group.
Document Name	Enter a title for the document.
File Name	Click Browse to locate the file.
Source/EDMS Name	Select the name for your agency's electronic document management system. Note that this field can have either of these titles, depending upon your agency's configuration.
User Email	Enter one or more email addresses that you want to associate with the attachment. You can enter the user's email address, the address of the document author, or any other related email address. Separate multiple addresses with commas.

Mapping GIS Attribute Fields to Parcel Fields

To enable users to create parcels for selected GIS features from ESRI ArcMap and support synchronizing parcel information between Civic Platform and the legacy Accela GIS, you must map each GIS attribute to a parcel field in Civic Platform. For more information about where the GIS attribute comes from and how its maximum field length is determined, see “Understanding Field Mapping” in the *Accela Extension for Esri ArcMap User Guide*.

To map GIS attributes to parcel fields

1. Access the GIS Attribute Mapping portlet ([Navigating to the Setup Portlet](#)).
Civic Platform displays the GIS Attribute Mapping portlet.

Administration

GIS Attribute Mapping

Menu ▾ Save Reset Help

GIS Service *	GIS Layer *	GIS ID for Parcel # *
sa	Parcels	—Select—

GIS Attribute	Type	Length	AA Attribute
APN	Text	14	None
AREA	Number	8	None
CITY	Text	32	None
LANDUSE	Text	6	None
LOT	Text	3	None
LOT_SIZE	Number	8	None
MAIL_ADDRE	Text	24	None
MAIL_CITY	Text	14	None
MAIL_STATE	Text	2	None
MAIL_ZIP	Text	5	None
NAME	Text	50	None
NEIBRHC	Text	6	None
OBJECTID	Number	10	None
PERIMETER	Number	8	None
STREET_NAM	Text	40	None
STREET_NBR	Text	8	None
SUBDIVISIO	Text	7	None
TRA	Text	6	None
ZIP	Number	8	None
ZONE	Text	6	None

2. Complete these fields that appear in sequence:

GIS Service

This drop-down list displays all the map services configured for your agency. After you select a map service, the GIS Layer drop-down list populates with all the related map layers.

GIS Layer

This drop-down list displays all the map layers configured for the map service you select in the GIS Service drop-down list. After you select a map layer, the GIS ID for Parcel # drop-down list populates with all the related GIS attributes.

GIS ID for Parcel ID

This drop-down list displays all the attributes for the map layer you select in the GIS Layer drop-down list. Select the GIS attribute that you want to use for the Parcel ID in Civic Platform.

Civic Platform displays the attributes that belong to the selected map service and map layer.

3. Select a desired parcel field from the Civic Platform Attribute drop-down list next to the GIS attribute that you want to map the parcel field to.



Note:

Make sure that each Civic Platform attribute is of the same data type and at minimum the same data length with the mapped GIS attribute. For a numeric Civic Platform attribute that has decimal places, make sure both its integer and its fraction length is no less than that of the mapped GIS attribute. Otherwise, you cannot save the mapping.

4. Click **Save.**

Working with Reference Data

You can track relationships between different types of reference records, such as addresses, parcels, and owners. You can associate owner and address records to a parcel record to facilitate efficient and accurate data entry.

Topics

- [Adding New Addresses, Parcels, and Owners](#)
- [Editing Existing Addresses, Parcels, and Owners](#)
- [Searching for Addresses, Parcels, or Owners](#)

Adding New Addresses, Parcels, and Owners

This procedure describes how to add new address, parcel, and owner reference data to your Civic Platform database. Adding APO reference data enables users to select an existing address, parcel, or owner from a list when they create a new record.

After you add an address to your reference database, you can enable it to make the address available for searching when setting up an application, or specifying the addresses for a parcel. You can add owners to your system and link them to one or more parcels. You can also add owners not directly linked to any parcel.

To add new addresses, parcels, and owners

1. Click the Property main link.



Civic Platform displays the Property page, which is comprised of the Address, Parcel, and Owner portlets.

The image shows three separate search interface windows stacked vertically. Each window has a title bar, a toolbar with buttons for Menu, Submit, Reset, Cancel, Help, and a checkbox for 'Enable Soundex Search', and a main search field area.

- Addresses:** Fields include Number, Direction (dropdown: --Select--), Street Name (with a magnifying glass icon), Street Type (dropdown: --Select--), Zip Code, City, Lot, and Neighborhood.
- Parcels:** Fields include Parcel #, Lot, Subdivision, Owner, Street #, Street Name (with a magnifying glass icon), and Street Type (dropdown: --Select--).
- Owners:** Fields include Full Name, Parcel #, First Name, Last Name, Mail Address Line 1, Mail City, Mail State (dropdown: --Select--), and Mail Zip Code.

- Before you can add or edit an address, parcel, or owner you must search for it in your Civic Platform database.

Search for the address, parcel, or owner by entering search criteria into any field. For a description of fields, see [Address Search Fields](#), [Table 172: Parcel Search Fields](#), and [Table 173: Owner Fields](#).

- Click **Submit**.

Civic Platform returns a list of addresses, parcels, or owners.

The image shows a table of search results for parcels. The table has a header row with columns for 'Parcel #', 'Address', 'Owner', and 'Parcel Status'. Below the header are four data rows, each representing a different parcel. The first row is highlighted with a blue background.

Parcel #	Address	Owner	Parcel Status
005083001	816 ST FRANCIS DR, PETALUMA, CA 94952	JOHNSON DONALD L & MARILYN ...	Enabled
005123003	1008 CATALPA WAY, PETALUMA, CA 94952	JOHNSON DONAL EUGENE TR & M...	Enabled
005152021	1300 ASPEN WAY, PETALUMA, CA 94952	JOHNSON CHAD DANIEL & MARY M	Enabled

- Click **New**.

Civic Platform displays an address, parcel, or owner detail form.

Parcel Detail Associated Record List Genealogy Summary Conditions Documentation

Parcel # * Primary **Parcel Status ***

Subdivision Lot Block

Legal Description

[check spelling](#)

Township Section Range

County Map Book Number Parcel Dropdown
--Select--

Parcel Shape Parcel Status Notes

5. Enter address, parcel, or owner data into the form fields. For field descriptions, refer to [Table 169: Address Fields](#), [Table 171: Parcel Fields](#), and [Table 173: Owner Fields](#).

6. Click **Submit**.

Civic Platform displays a success message.

Parcel #: 112277

Menu Save Reset Help

Parcel Detail Associated Record List Genealogy Summary Conditions (0)

Created parcel successfully.

Parcel # * Primary **Parcel Status ***

Subdivision Lot Block

Editing Existing Addresses, Parcels, and Owners

After you add APO reference data, you can edit it as needed. You can also change APO reference data independent of any particular address, parcel, or owner when you edit the record.

To edit an existing address, parcel, or owner

1. Complete - of [Adding New Addresses, Parcels, and Owners](#).
 2. Click the link to the address, parcel, or owner that you want to edit.
 - For addresses, the street number is the link.
 - For parcels, the parcel number is the link.
 - For owners, the owner name is the link.
- Civic Platform displays the address, parcel, or owner detail form.

Parcel #: 112277

Menu Save Reset Help

Parcel Detail Associated Record List Genealogy Summary ▶

Parcel # *	Primary	Parcel Status *
112277	Yes	Enabled
Subdivision	Lot	Block
Rocky Oak Hills	11	2
Legal Description		
The NW 1/4 of the SE 1/4 of Section 5, T3N, R11E, more or less 40 acres, to the south of Winterfell in Tyrion County, Kings Landing		
check spelling		

3. Edit the form fields, as needed. For field descriptions, refer to [Table 169: Address Fields](#), [Table 171: Parcel Fields](#), and [Table 173: Owner Fields](#).

4. Click **Save**.

Civic Platform displays a success message.

Parcel #: 112277

Menu Save Reset Help

Parcel Detail Associated Record List Genealogy Summary

Parcel updated successfully.

Parcel # *	Primary	Parcel Status *
112277	Yes	Enabled
Subdivision	Lot	Block
Rocky Oak Hills	11	2

Searching for Addresses, Parcels, or Owners

When you want to edit an existing address, you first need to find it in your reference database. You might also need to search for an address if you want to view details about the address without changing it.

You can search for any owner defined on your system, including those that you previously disabled. For example, you can search for an owner to update information or to change the status of the owner.

To search for an address, parcel, or owner

1. Complete - of [Adding New Addresses, Parcels, and Owners](#).
 2. Complete any of the search criteria fields as described in [Address Search Fields](#), [Table 172: Parcel Search Fields](#), and [Table 173: Owner Fields](#).
 3. Click **Submit**.
 4. Click the link to the address, parcel, or owner that you want.
 - For addresses, the street number is the link.
 - For parcels, the parcel number is the link.
 - For owners, the owner name is the link.
- Civic Platform displays the address, parcel, or owner detail form.

Parcel #: 112277

Menu ▾ Save Reset Help

Parcel Detail Associated Record List Genealogy Summary ►

Parcel # *	Primary	Parcel Status *
112277	Yes	Enabled
Subdivision	Lot	Block
Rocky Oak Hills	11	2

Legal Description
The NW 1/4 of the SE 1/4 of Section 5, T3N, R11E, more or less
40 acres, to the south of Winterfell in Tyrion County, Kings Landing

[check spelling](#)

Maintaining APO Templates

Address Parcel Owner (APO) Templates let you set up the fields, or attributes, that you want to include on each address, parcel, or owner record in your system. For example, you might want to know the organization that sponsors a particular owner.

These attributes show up as fields in addition to the standard fields, such as “name” and “address.” You can set up different templates for addresses, parcels, or owners. For example, you can collect unique information about addresses that you do not require for owners.

Configuring this functionality is available in Classic Administration.

Topics

- [Adding an APO Template](#)
- [Adding APO Fields to Forms](#)
- [Searching for an APO Template](#)
- [Editing an APO Template](#)
- [Adding an Attribute to an APO Template](#)
- [Editing an APO Template Attribute](#)
- [Setting Up Values for a Drop-Down List](#)

Adding an APO Template

When you create a new template, you determine the name, type, and description of the template. APO templates generally include attributes, or fields, that apply only to addresses, parcels, or owners.

To add an APO template

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Property > APO Template**.

Civic Platform displays the Attribute Template—Search page.

Attribute Template - Search
Use this form to search or add Attribute Templates.

Attribute Template Name:	<input type="text"/>
Attribute Type:	OWNER
Description: 	
Status: <input checked="" type="radio"/> All <input type="radio"/> Enable <input type="radio"/> Disable	
Submit	
or	
Add	
New Attribute Template	

3. Click Add.

4. Complete these fields:

- | | |
|---------------|---|
| Template Name | Enter the name of template. |
| Template Type | Choose the appropriate template type. |
| Description | Enter a description of the template to help you identify its purpose or the attributes within the template. |

5. Click Submit.

- 6. Add one or more attributes to the template. For instructions, see [Adding an Attribute to an APO Template](#).**
- 7. Add the APO template data to the various APO forms. For instructions, see [Adding APO Fields to Forms](#).**

Adding APO Fields to Forms

After you create your new APO Template you must add this template data to the various APO forms to enable users to see your new agency-defined APO fields.

To add template data to forms

1. Navigate to the appropriate property tab (Address, Parcel, or Owner) on the Record detail portlet.
2. To open the detail form, click the link to the address, parcel, or owner.
3. To add the new field to the form, choose *Menu > Edit View*.
4. From the list of fields, click the Template field.
5. Click **OK**.
6. In the *Effect Scope* section, set the user access.
7. Click **Save**.

Searching for an APO Template

You can search for any address, parcel, or owner template defined on your system, including templates that you previously disabled. For example, you might need to search for a template to update information or to change the status of the template.

**Note:**

To see a list of all the templates on your system, Click **Submit** without entering details about an individual template.

To search for an APO template

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose **Property > APO Template**.

Civic Platform displays the Attribute Template—Search page.

Attribute Template - Search
Use this form to search or add Attribute Templates.

Attribute Template Name:
Attribute Type: OWNER
Description:
Status: All Enable Disable

Submit or **Add** **New Attribute Template**

3. Complete these fields:

Attribute Template Name	Enter the name of template.
Attribute Type	Choose the type of template you want to find. For example, if you want to find an address template, choose "Address."
Description	Enter a description of the template that you want.
Status	Select the current mode of the template that you want to find. You can search for enabled or disabled items.

4. Click **Submit**.

Civic Platform displays the APO Template Browse page.

Attribute Template - Browse
Use this form to select a Attribute Template.
(Click the ● below to select)

Attribute Template	Attribute Type	Description	Status
20061141624420061141	ADDRESS	Beta Test2d a b c	Disable
ADRESSTEMPLATE	ADDRESS	This Is Address template for ACA, please don't change	Enable
ADD_TMP	ADDRESS		Disable
ADRESS TEMPLATE	ADDRESS		Disable
DATE	ADDRESS		Disable
DEAN_ADRESS	ADDRESS	dean_adress	Disable
DIRECTION	ADDRESS		Disable
ELAN MAT ADD TEML	ADDRESS	test	Disable
ELAN_MAT_6.7.0_PATCH_3	ADDRESS		Enable
FIONA	ADDRESS		Disable

Pages: 1 2 3 **Search** or **Add** **New Attribute Template**

5. Click the red dot that appears next to the template that you want.

Editing an APO Template

After you create a template, you might need to change the template description, status, or attributes. You can also add or edit any attributes defined for the template.

You cannot change the template name or template type, but you can add a new template and disable any templates that you no longer use.

To edit an APO template

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Property > APO Template**.

Civic Platform displays the Attribute Template—Search page.

Attribute Template - Search

Use this form to search or add Attribute Templates.

Attribute Template Name:

Attribute Type: OWNER

Description:

Status: All Enable Disable

Submit **OR** **Add** **New Attribute Template**

3. Search for the APO template that you want. For instructions, see [Searching for an APO Template](#).
4. Click the red dot next to the template you want to edit.

Civic Platform displays the Attribute Template page for the template you selected:

Attribute Template

Use this form to edit Attribute Template.

Template Information

Attribute Template Name: OWNER **Edit Info**

Attribute Type: OWNER

Description:

Status: Disable

Group: N/A

Label	Description	Unit	Data Type	Required Flag	ACA Displayable	Record Searchable	Status
Deed Date		Date	No	No	No	No	Disable
Deed Page		Text	No	No	No	No	Disable
Deed Book		Text	No	No	No	No	Disable

Add **Cancel**

5. Click the **Edit Info** button that appears to the right of the **Template Information** section.

Civic Platform displays the Attribute Template—Edit window.

Attribute Template - Edit

Attribute Template Name * : OWNER

Attribute Type * : OWNER

Description:

Status: Enable Disable

Submit **Cancel**

6. Update these fields:

- | | |
|-------------|--|
| Description | Enter a description of the template to help you identify its purpose or the attributes within the template. |
| Status | If you want to let users see this field in Civic Platform, select Enable ; otherwise, select Disable . |

7. Click **Submit**.
8. Edit any attributes for the template. For instructions, see [Editing an APO Template Attribute](#).

Adding an Attribute to an APO Template

After you create a template, you can define attributes for the template. Each attribute that you define for a specific template shows up as an additional field when users add or edit an address, parcel, or owner based on that template.

When you add attributes to a template, you can determine whether the attribute displays as a text field, a drop-down list or another data type, such as an option button. You can also determine whether the field is mandatory or optional.

To add an attribute to an APO template

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Property > APO Template**.

Civic Platform displays the Attribute Template—Search page.

Attribute Template - Search

Use this form to search or add Attribute Templates.

Attribute Template Name:

Attribute Type: OWNER

Description:

Status: All Enable Disable

Buttons: Submit, or, Add, New Attribute Template

3. Search for the APO template that you want. For instructions, see [Searching for an APO Template](#).
- Civic Platform displays the Attribute Template page for the template you selected:

Attribute Template

Use this form to edit Attribute Template.

Template Information

Attribute Template Name: OWNER **Edit Info**

Attribute Type: OWNER

Description:

Status: Disable

Group: N/A							
Label	Description	Unit	Data Type	Required Flag	ACA Displayable	Record Searchable	Status
• Deed Date		Date	No	No	No	No	Disable
• Deed Page		Text	No	No	No	No	Disable
• Deed Book		Text	No	No	No	No	Disable

Buttons: Add, Cancel

4. Click **Add**.
- Civic Platform displays the Attribute Template's Attribute—Add window.

Attribute Template's Attribute - Add

Attribute Template Name: OWNER
Attribute Type: OWNER

Attribute Name * :

Label:

Description:

Default Value:

Unit: or
New Unit:

Data Type: Number

Display Order:

Required Flag: Yes No

ACA Displayable: Yes No

Record Searchable: Yes No

Status: Enable Disable

5. Complete the necessary fields as described in [Table 175: Address, Parcel, and Owner Template Attribute Fields](#).

6. Click **Submit**.

Table 175: Address, Parcel, and Owner Template Attribute Fields

Attribute Name	Enter the name of the attribute.
Label	Enter the label for the attribute that displays when a user adds or edits address, parcel, or owner information.
Description	Enter a description of the attribute that helps to identify its purpose.
Default Value	If you want to supply a default value, enter it here. If you are setting up a drop-down list, you can add values to the drop-down list so that a user has multiple values to choose from.
Unit	If you want to attach a unit such as "square feet," "dollars," or "miles" to the first field value, enter it here. You can choose from standard choices, or enter a new unit.
Data Type	Choose the type of the attribute. You can choose from Date, Number, Radio, or Drop-down List types.
Display Order	Enter a number to determine the position of the first field in your Application Specific Information group. For example, if you want the field to display before any other fields, enter 1.
Required Flag	If you want this attribute to be mandatory for the Address, Parcel, and Owner template, select Yes ; otherwise, select No .
Citizen Access Displayable	If you want Citizen Access to display this attribute, select Yes ; otherwise, select No . Note: If you select No for this attribute, when users associate an APO that contains the attribute with a record, the attribute does not display in Citizen Access, but its value is stored for the record.
RecordSearchable	If you want to allow users to search for records using this attribute, select Yes ; otherwise, select No .
Status	If you want to let users see this field in Civic Platform, select Enabled ; otherwise, select Disabled .

Editing an APO Template Attribute

After you add an attribute to a template, you might need to change it. You can update any attributes within the template by changing the label, data type, and any other features of the attribute.

You cannot change the attribute name or delete an attribute, but you can add a new attribute and disable attributes that you no longer use.

To edit an APO Template Attribute

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose **Property > APO Template**.

Civic Platform displays the Attribute Template—Search page.

Attribute Template - Search

Use this form to search or add Attribute Templates.

Attribute Template Name:

Attribute Type: OWNER

Description:

Status: All Enable Disable

Submit **or** **Add** **New Attribute Template**

3. Search for the APO template that you want. For instructions, see [Searching for an APO Template](#).

4. Click the red dot next to the template you want to edit.

Civic Platform displays the Attribute Template page for the template you selected:

Attribute Template

Use this form to edit Attribute Template.

Template Information

Attribute Template Name: OWNER

Attribute Type: OWNER

Description:

Status: Disable

Edit Info

Group: N/A							
Label	Description	Unit	Data Type	Required Flag	ACA Displayable	Record Searchable	Status
● Deed Date		Date	No	No	No	No	Disable
● Deed Page		Text	No	No	No	No	Disable
● Deed Book		Text	No	No	No	No	Disable

Add **Cancel**

5. Click the red dot that appears next to the attribute that you want to edit.

Civic Platform displays the Attribute Template's Attribute—Edit page.

Attribute Template's Attribute - Edit

Attribute Template Name: OWNER
Attribute Type: OWNER
Attribute Name * : DEEDPAGE

Label: Deed Page

Description:

Default Value:

Unit: or

Data Type: Text

Display Order: 20

Required Flag: Yes No

ACA Displayable: Yes No

Record Searchable: Yes No

Status: Enable Disable

Submit **Cancel**

6. Complete the necessary fields as described in [Table 175: Address, Parcel, and Owner Template Attribute Fields](#).

7. Click **Submit**.

Setting Up Values for a Drop-Down List

Templates a collection of several attributes. You can add an attribute to a template that displays as a drop-down list. After you add a drop-down list attribute to a template, you must set up the values that you want to include in the list. Users can then choose from the values when adding or updating addresses, parcels, or owners.

To set up values for a drop-down list

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose **Property > APO Template**.

Civic Platform displays the Attribute Template—Search page.

Attribute Template - Search

Use this form to search or add Attribute Templates.

Attribute Template Name:

Attribute Type: OWNER

Description:

Status: All Enable Disable

Submit **or** **Add** **New Attribute Template**

3. Search for the APO template that you want. For instructions, see [Searching for an APO Template](#).

4. Click the red dot next to the template you want.

Civic Platform displays the Attribute Template page for the template you selected:

Attribute Template

Use this form to edit Attribute Template.

Template Information

Attribute Template Name: PERMIT_PARCEL
 Attribute Type: PARCEL
 Description:
 Status: Disable

[Edit Info](#)

Group: N/A

Label	Description	Unit	Data Type	Required Flag	ACA Displayable	Record Searchable	Status
• PARCEL_1		RADIO	Radio	Yes	No	No	Disable
• PARCEL_2			DropdownList	Yes	No	No	Disable Edit

[Add](#) [Cancel](#)

5. Click Edit next to the drop-down list attribute that you want.

**Note:**

The Edit button is only available next to the drop-down list attribute.

Civic Platform displays a page where you can add, edit, or delete drop-down list values:

Attribute Template Name: PERMIT_PARCEL
 Attribute Type: PARCEL
 Attribute Name: PARCEL_2

Use Shared Drop Down Lists: [Search](#)

[Delete](#) (User Default Value)

[Update](#) [Add](#) [Close](#)

6. Do one or more of these options:

- If you want to add a new value, click **Add**, enter the value in the **Attribute Value** field, and then click **Save**.

Attribute Template Name: PERMIT_PARCEL
 Attribute Type: PARCEL
 Attribute Name: PARCEL_2

Attribute Value: [Save](#) [Cancel](#)

- To update an existing value, replace the value text and then click **Update**.
- To delete a value, click **Delete**.

7. Click **Close** to return to the list of fields in your template.

Structures and Establishments

This topic describes the configuration tasks for the Structures and Establishments module, and contains detailed information on creating structure and establishment types.

The first step in managing Structures and Establishments is to create structure and establishment types. After you define a type, you can customize the fields that display in records of that type. You do this by creating attributes, characteristics of structures or establishments that display as data entry fields, and gathering groups of attributes into templates. After you attach a template to a type, the fields contained in the template display in records created from that type. Both attributes and templates share information between the structures and establishments module and the asset management module of Civic Platform. You can find complete details about managing attributes and setting up templates in [Attributes and Templates](#).

You can also use the Form Layout Editor to customize the layout of structure and establishment records. Design a layout for a template, then attach the template to structure and establishment type. All structure and establishment types that you attach this template to display this layout. For complete information on working with the Form Layout Editor, refer to [Designing Forms for Portlets](#).

You can configure your system to synchronize address, parcel, or owner information associated to structures that users add to or remove from records. When you associate a parcel to a structure, if a user adds that structure to or removes it from a record, the parcel information can populate the record as well, either automatically or following a message prompt. For information on configuring reference data synchronization, see [Managing Property: Addresses, Parcels, and Owners](#).

Click a topic title below for full details.

Related Information

[Configuring Structures and Establishments](#)

[Managing Structure and Establishment Types](#)

Configuring Structures and Establishments

When you associate an establishment with a structure, you can configure your system to take the APO data associated to the establishment and automatically associate it to the structure.

Enabling Structures and Establishments for Application Intake Forms

You can make sections for structures and establishments on the Application Intake Form. Enable the Structure and Establishment fields in an Intake Form Configuration Group. Any application type associated with this Intake Form Configuration Group includes the Structure and Establishment sections. For more information on Intake Form Configuration Groups, see [Creating and Configuring Records](#).

To enable structures and establishments for application intake form

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Application > Intake Form Configuration Group**.
Civic Platform displays the Intake Form Configuration Group Search page.
3. In the **Group Name** field enter the name of the Intake Form Configuration Group for which you want to enable the Structures and Establishments sections.
To see a complete list of Intake Form Configuration Groups, leave this field blank.
To create a new group, see [Creating and Configuring Records](#).

4. Click Submit.

Civic Platform returns a list of Intake Form Configuration Groups that match your search criteria.

5. Click the red dot beside the Intake Form Configuration Group you want to edit.

Civic Platform displays the Intake Form Configuration Group Details - Edit page.

SmartChoice Group Details - Edit

Use this form to edit the group details

Group Name: BLD_GENERAL

	Display	Required	Validate	Default Value	Display Button	Display Order
CAP Detail:						1
Address:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No			2
Parcel:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No			3
Owner:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			4
Licensed Professional:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			5
Applicant:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	6
Contact1:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	7
Contact2:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	8
Contact3:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	9
Multiple Contacts:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Click to add contact types	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	10
Complainant Info:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				11
Complaint Info:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				12
Additional Info:	<input checked="" type="radio"/> Yes <input type="radio"/> No					13
Application Status:	<input checked="" type="radio"/> Yes <input type="radio"/> No					14
Application Specific Info:	<input checked="" type="radio"/> Yes <input type="radio"/> No					15
Associated GIS Features:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				
Structure:	<input type="radio"/> Yes <input checked="" type="radio"/> No			AAA	<input checked="" type="checkbox"/>	16
Establishment:	<input type="radio"/> Yes <input checked="" type="radio"/> No					17
Event:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				18
Asset:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				19
Application Specific Info Table:	<input type="radio"/> Yes <input checked="" type="radio"/> No					20
Documents:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				21
Education:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				23
Continuing Education:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				24
Examination:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				25
Comments:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				26

Save **Cancel**

6. To enable the Structure and Establishment sections in application intake forms for application types associated to this Intake Form Configuration Group, select the **Yes option in the **Structure** and **Establishment** fields.**

7. Click Save.

Civic Platform saves your changes.

Managing Structure and Establishment Types

This section discusses the creation and editing of Structure and Establishment types. When you create structure and establishment types, you determine the kinds of structure and establishment records users can create, including the data entry fields that display in the record forms.

You can attach templates to your structure and establishment types. These consist of groups of attributes, which are pieces of information users need to track structures and establishments. Civic Platform shares attributes and templates between the structures and establishments module and the asset management module. For information on attributes and templates, see [Attributes and Templates](#).

You can also design the form layout for templates, automatically applying the layout to any structure or establishment type that uses the template. For information on the Form Layout Editor, see [Designing a Form Layout](#).

Topics

- [Creating a Structure or Establishment Type](#)
- [Searching for a Structure or Establishment Type](#)
- [Editing a Structure or Establishment Type](#)
- [Deactivating a Structure or Establishment Type](#)
- [Activating a Structure or Establishment Type](#)

Creating a Structure or Establishment Type

Accela users can create structure and establishment records to track complex properties, such as malls, that contain multiple business and residential establishments within one structure. You create structure and establishment types that users choose from to create these records. You can customize each type with specialized fields and layout.

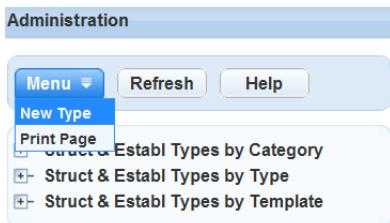
Some examples of structure types are Mall and Apartment/Commercial. You can create establishment types for the Apartment/Commercial structure type, such as Apartment, Restaurant, Coffee House, and Book Store.

To include customized fields in a structure or establishment type, you can attach a template to the type. For information on templates, see [Working with Templates](#).

To create a structure or establishment type

1. Access the Structures and Establishments Types portlet ([Accessing the Structures and Establishments Types Portlet](#)).
2. Click **New** in the Structure and Establishment Types portlet.

- a. You can also click or hover over the **Menu** button in the Structure and Establishment Type navigation tree.



- b. Click the **New Type** option.

Civic Platform displays the New Structure and Establishment portlet.

Category*		Type*	Template ID*
<input type="button" value="--Select--"/>		<input type="text"/>	<input type="button" value="--Select--"/>
Description		<input type="text"/> Mask Name* <input type="button" value="--Select--"/> <input type="text" value="Mask Name"/>	
check spelling			

3. Complete the following required fields:

Category	Select either Structure or Establishment from this drop-down menu.
Type	Enter a name for the Structure or Establishment type you are creating.
Template ID	Select a template from this drop-down menu. For information on templates, see Working with Templates .

4. If you choose, you can complete the **Description** field.

5. Click **Submit**.

Civic Platform creates the structure or establishment type.

Searching for a Structure or Establishment Type

To find a structure or establishment type using the navigation tree

1. Access the Structures and Establishments Types portlet ([Accessing the Structures and Establishments Types Portlet](#)).

2. In the navigation tree, use the + and - buttons to expand and contract the following categories:

Struct & Establ Types by Category	Lists all Structure and Establishment types; organizes the types by Structure and Establishment category.
Struct & Establ Types by Type	Lists all Structure and Establishment types; organizes the types by Structure and Establishment type.
Struct & Establ Types by Template	Lists all Structure and Establishment types; organizes the types by Structure and Establishment template.

3. Click the name of the type you want to view.

Civic Platform displays the type detail portlet.

To find a structure or establishment type in the primary portlet

- Access the Structures & Establishments Types portlet ([Accessing the Structures and Establishments Types Portlet](#)).

- In the **Structure & Establishment Types** portlet, click **Search**.

Civic Platform displays the Structure and Establishment Type search portlet.

The screenshot shows the 'Structure & Establishment Types' search interface. It includes a 'Category' dropdown set to '-Select-', a 'Type' input field, a 'Template ID' dropdown set to '-All-', a 'Description' text area, and a 'Record Status' dropdown set to 'Active'. At the top are buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'.

- Complete any fields that display.

- Click **Submit**.

Civic Platform returns a list of structure and establishment types that match your search criteria.

Editing a Structure or Establishment Type

To edit a structure or establishment type

- Find the structure or establishment type you want to edit. For instructions on how to find a structure or establishment type, see [Searching for a Structure or Establishment Type](#).

Civic Platform displays the Structure and Establishment Type detail portlet.

Category	Type	Template ID	Description	Last Updated	Updated By	Record Status
STRUCTURE	Mall	QS-Temp-01	test	01/03/2009	ADMIN	A

Type: Mall

Category: STRUCTURE
Type: Mall
Template ID: QS-Temp-01
Description:
Record Status: Active
Mask Name:

- You can edit the following fields:

Template ID Select a template from this drop-down menu. Templates are groups of attributes that display as data entry fields in a structure or establishment record. When you change the template, you change the field content of the structure or establishment type.

Description Edit the description of this structure or establishment type.

- Click **Save**.

Civic Platform saves the changes to the structure or establishment type.

Deactivating a Structure or Establishment Type

After you create a structure or establishment type, you cannot delete it from the database. You can, however, deactivate the type. When you deactivate a type, it no longer displays in the Structure and Establishment Types list, but it still appears in the navigation tree for structure and establishment types.

To deactivate a structure or establishment type

1. Find the structure or establishment type you want to delete. For instructions on how to find a structure or establishment type, see [Searching for a Structure or Establishment Type](#).
 2. Select the structure or establishment type(s) you want to delete.
 3. Click the **Deactivate** button.
- Civic Platform deactivates the type and removes it from the Structures and Establishments Types list.

Activating a Structure or Establishment Type

You can activate a deactivated structure or establishment type. Locate the type in the navigation tree and then click its name to restore it to the Structures and Establishments Types list.

To activate a structure or establishment type

1. Access the Structures & Establishments Types portlet ([Accessing the Structures and Establishments Types Portlet](#)).
2. In the navigation tree, use the + and - buttons to locate the structure or establishment type you want to activate by expanding and contracting the following categories:

Struct & Establ Types by Category	Lists all Structure and Establishment types; organizes the types by Structure and Establishment category.
Struct & Establ Types by Type	Lists all Structure and Establishment types; organizes the types by Structure and Establishment type.
Struct & Establ Types by Template	Lists all Structure and Establishment types; organizes the types by Structure and Establishment template.

Category	Type	Template ID	Description	Last Updated	Updated By	Record Status
STRUCTURE	Mail	QS-Temp-01	test	01/03/2009	ADMIN	A

3. Click the hyper linked name of the structure or establishment type you want to activate.
- Civic Platform activates the type and restores it to the Structures and Establishments Types list.

Inspections

This topic describes the configuration tasks involved with setting up all of the different inspections that users need to complete for a certain type of application. You determine which inspections that you deem required in an inspection group, and the order in which users must complete them. For example, if you require a Foundation Wall, Electrical, and Plumbing inspection before issuing a building permit, you can set up a Building inspection group that includes those inspections for all Building application types.

There can be one or more inspection types in an inspection group. With each inspection type you must specify the checklist group, result group and grade group, which are the guidelines to follow for performing the actual inspection and for resulting the inspection score, inspection status, and inspection grade.

You can activate the auto assign feature for individual inspection types that automatically schedules inspections and assigns them the appropriate inspectors.

After you create an inspection group and add inspection types, you can set up an inspection flow process. The inspection flow process is an outline of all the inspections that a user group needs to complete between the application submittal and the issuance of a permit or license to the applicant. For explanations of these steps refer to [Managing Inspection Flows and Milestones](#).

Click a topic title below for full details.

Related Information

[Managing Inspection Groups](#)

[Establishing Inspection Types](#)

[Setting Up an Inspector Profile](#)

[Managing Inspection Scheduling](#)

[Working with Inspection Result Groups](#)

[Working with Inspection Grade Groups](#)

[Managing Checklist Groups](#)

[Establishing Checklists](#)

[Configuring Inspection Route Sheets](#)

[Assigning Inspection Categories](#)

[Managing Inspection Flows and Milestones](#)

Managing Inspection Groups

Topics

- [Creating an Inspection Group](#)
- [Searching for an Inspection Group](#)
- [Editing an Inspection Group](#)

Creating an Inspection Group

When you create an inspection group, you determine the group code, the group name, and the inspection types the group includes.

To create an inspection group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

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"/>
<input type="button" value="Submit"/> or <input type="button" value="Add"/>	
New Inspection Group	

3. Click **Add**.

4. Complete these fields:

Inspection Group Code Enter a unique group code. You might want to enter a shortened version of the inspection group name as the group code. For example, you might name an inspection group Restaurant Build Out and shorten the title to RestBuildOut for the inspection group code.

Inspection Group Name Enter a unique group name. Inspection Group Name is the full-length version of a short name for an inspection group code. For example, you might name an inspection group Restaurant Build Out and shorten the group code to RestBuildOut.

5. Click **Submit**.

Civic Platform displays the Inspection-Edit page.

6. Add one or more inspection types. For information on how to add inspection types to inspection groups, see [Adding an Inspection Type](#).

Searching for an Inspection Group

You can search for any inspection group in Civic Platform, including disabled inspection groups. Conduct a search when you want to modify inspection group information, such as inspection types or inspection auto-assignment. To view all inspection groups, click **Submit** on the Inspection Search page without completing the Search fields.

To search for an inspection group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

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"/>
<input type="button" value="Submit"/> or <input type="button" value="Add"/>	
New Inspection Group	

3. Complete these fields:

Inspection Group Code Enter the inspection group code for the inspection group you want to find.

Inspection Group Name Enter the inspection group name for the inspection group you want to find.

4. Click Submit.

Civic Platform displays the inspection group(s) that matches your search criteria on the Inspection - Browse page.

5. Click the red button next that appears in the **Edit column next to the inspection group you want.**

Civic Platform displays the Inspection - Edit page.

Editing an Inspection Group

After you add an inspection group, you might need to modify the group information, including associated inspection types, checklist groups, inspection point values, and their display order.

To edit an inspection group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

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:
Inspection Group Name:

Submit
or
Add
New Inspection Group

3. Search for the inspection group that you want.

For instructions on searching for an inspection group, see [Searching for an Inspection Group](#).

Civic Platform displays the Inspection - Edit page.

Inspection - Edit
Use this form to set up an Inspection Group.

Inspection Group Code: AutoAssign
Inspection Group Name(Default): AutoAssign
Inspection Group Name * : AutoAssign **Inspection Flow**

Configure By: **Inspection Flow** **Inspection Milestone** **None**

Inspection Type(Default)	Inspection Type	Guide Sheet Group	Result Group
Fire inspect	Fire inspect	No group assigned	Electrical

Allow Failed Guidesheet Items: Yes
Capture and carry over failed guide sheet items: None
Reschedule Restriction: No Restriction Hours Prior 1 Days Prior 0 at AM PM
Cancel Restriction: No Restriction Hours Prior 1 Days Prior 0 at AM PM

4. Make any necessary changes to the inspection group. For a complete list of editable fields, see [Table 176: Inspection Group Fields](#).

5. Click **Update.**

Civic Platform updates the selected inspection group.

Establishing Inspection Types

You can create different inspection types for a particular inspection group. For example, you can have a building inspection group, but there might be different inspection types for the different inspections that fall under the building category. You can add as many inspection types to an inspection group as you need. Inspection types within a group form the list of required inspections for any application associated with the inspection group.

Topics

- [Adding an Inspection Type](#)
- [Editing an Inspection Type](#)
- [Deleting an Inspection Type](#)
- [Assigning Disciplines to an Inspection Type](#)

Adding an Inspection Type

After you create an inspection group, you can add inspection types to the group. For example, you can include a Foundation Wall inspection and a Fire inspection in the same group. You can later edit an inspection type.



Note:

You cannot associate an inspection result group with an inspection type at the same time you create the inspection type. You can do that when you edit the inspection type.

To add an inspection type

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Inspection**.
3. Search for the inspection group that you want.
For instructions, see [Searching for an Inspection Group](#).
4. Click the **Inspection Group Code** link corresponding to the inspection for which you want to add an inspection type.
For field descriptions see [Table 176: Inspection Group Fields](#).
Civic Platform displays the Inspection - Edit page.
5. Scroll to the Inspection - Edit screen and click the **Add Type** button.
Civic Platform displays the following.

Add Inspection Type
Inspection Group Code: AutoAssign

Inspection Type:

Save **Cancel**

6. Enter the name of the type in the **Inspection Type** field.
7. Click **Save**.

Table 176: Inspection Group Fields

Citizen Access Inspection Display	Select Yes to enable the display of these inspections in ACA. Select No to hide the inspections from Citizen Access. You can set a specific inspection to display in or hide from Citizen Access in V360. For complete information, see “Displaying an Inspection in Citizen Access,” in the “Inspections” chapter of the Accela Civic Platform User Guide.
Citizen Access Multi-Inspection Schedule	Select Yes to enable the scheduling of multiple inspections for this inspection type in Citizen Access. Select No to limit the number of inspections to one time only for each application intake form in Citizen Access. Use this feature to allow a customer to schedule repeat inspections. For example, contractors typically require multiple concrete inspections for a large project requiring many pours.
Allow Failed Checklist Items	Select Yes to allow the inspection to pass with failed checklist items for the current inspection type or from previous inspections. Select No to require all current and failed checklist items to pass inspection prior to signing off on the inspection.
Allow to edit inspection result / inspection grade / checklist total score / checklist major violation	After users go through the inspection checklist items and enter their statuses, Civic Platform automatically populates the inspection result, inspection grade, checklist total score and checklist major violation option for the inspection. Inspection supervisors always have the right to override these auto-populated values. Select Yes to enable normal users (other than inspection supervisors) to edit the auto-populated values. Select No to forbid normal users from editing the auto-populated values.
Auto Assign	To activate the auto assign inspection scheduling feature, choose Yes from the drop-down list. To de-activate the auto assign inspection scheduling feature, choose No from the drop-down list.
Cancel Restriction	Select an option based on your agency’s policy for cancelling inspections. This restriction applies only to Citizen Access public users. If you want no restrictions on inspection cancellation, select No Restriction . If you want to restrict inspection cancellation, select the Hours Prior or Days Prior option and then enter a time and a date. For example, if you want to restrict inspection cancellation to 11:00 AM one day prior to the inspection date, select Days Prior and choose One Day Prior at 11:00 AM in the associated drop-down lists.
Capture and Carry Over Failed Checklist Items	Select a value from this drop-down list if you want failed checklist items to be transferred to the checklist of the next inspection that users schedule for the same application in Civic Platform or Citizen Access. Select one of these values: Auto: Select this option if you want selected failed checklist items automatically transferred to the checklist of the next inspection. Auto-All: Select this option if you want all failed checklist items automatically transferred to the checklist of the next inspection. Prompt: Select this option if you want a prompt to display that allows agency users to select which failed checklist items should be transferred to the next inspection checklist for an application. Note that with this option, Citizen Access does not carry over any failed checklist items. For complete instructions on how to configure checklist items for carry-over, see Carrying Over Failed Checklist Items .

Configuration	<p>Select one of the following options from the drop-down menu.</p> <p>Inspection Disciplines:</p> <p>Select this option if you want to assign a discipline to the selected inspection type. Civic Platform uses disciplines to categorize inspections. For example, you might assign Electrical inspection types, including Rough Electric and Electrical Outlet inspection types, to the Electrical Discipline. Administrators can set up discipline values with the Standard Choice <code>USER_DISCIPLINES</code>. For instructions on configuring this Standard Choice, see the <i>Accela Civic Platform Configuration Reference</i>. Civic Platform also uses disciplines as filtering criteria for automatic inspection scheduling. For more information on automatic inspection scheduling, see Setting Up Automatic Inspection Scheduling.</p> <p>Click Recurrence & Relationship Setting to configure those elements. You can configure automatic scheduling of recurring inspections based on a set period of time. You can base the time on the completion date of the previous inspection or on the initial creation date of the record. See Working with Recurring and Related Inspections.</p> <p>This link provides a visual of related inspections and reportable linkage between inspections. It enables you to differentiate the parent inspection from follow-up inspections. To allow users to modify related inspections, see Relating Inspections.</p> <p>Inspection Categories:</p> <p>Click the Inspection Categories link to assign the inspection type to one or more inspection categories. Civic Platform uses categories to organize inspection types. This helps public users, for example, to easily locate the desired inspection type when they try to schedule or request an inspection for a record in Citizen Access. Inspection categories are pre-defined by the Standard Choice <code>INSPECTION_CATEGORY</code>. For instructions on configuring this Standard Choice, see <i>Accela Civic Platform Configuration Reference</i>.</p>
Configure By	<p>Select an inspection option, based on your agency's preferences and best practices:</p> <p>Inspection Flow: Choose this option if you want to require public users to complete inspections in a certain order. With this option, you can enable the simultaneous completion of tasks, and you can allow public users to skip tasks that become unnecessary due to the completion of another task.</p> <p>Inspection MileStone: Choose this option to implement inspection milestones as checkpoints in the inspection process. These checkpoints require public users to complete an inspection before they can move on to the next set of inspections within the inspection group.</p> <p>To learn about setting up an inspection flow process, see Assigning Inspection Categories.</p>
Department	Click the Department button to select the department responsible for the inspection type.
Display Order	Enter a number to determine the position of the inspection type within a list of types. For example, if you want users to complete one type of inspection before any others, enter "1."
Flow Enabled	<p>To include the inspection in the inspection flow process, choose Yes from the drop-down list.</p> <p>For an explanation of setting up an inspection flow process, see Assigning Inspection Categories.</p>
Grade Group	Choose an active grade group that you want to assign to the inspection type. For instructions, see Managing Checklist Groups .

Checklist Group	Choose an existing group that you want to edit. For instructions, see Establishing Checklists . The Checklist Group field has a Configure the Required Checklist icon next to it. You can click the icon to set required checklists in the checklist group that inspectors must complete in the inspections of the inspection type.
Inspection Flow	Click this button to configure inspection flow process for a selected inspection group. To learn about setting up an inspection flow process, see Assigning Inspection Categories .
Inspection Score	<p>Select the method for calculating total scores based on the sub scores of the checklist items. These are your options:</p> <p>Total sub scores (the default method) Displays the sum of all the checklist item scores.</p> <p>Average of subtotal scores Displays the average score of all the checklist items.</p> <p>Lowest subtotal scores Displays the lowest checklist item score.</p> <p>Highest subtotal scores Displays the highest checklist item score.</p> <p>Subtracted sum of the scores (this option works with the Total Score field) Subtracts the total score of all the checklist items from the Total Score defined for the inspection type.</p>
Inspection Type	Enter the name of the inspection type.
IVR Number	Enter a unique number for the inspection type within the inspection group if IVR access is available.
Max Points	Enter the maximum number of points allowed before this type of inspection fails. If the total score of an inspection (the sum of points for all items on all checklists) is equal to or greater than this maximum, the Inspection Result Code list does not display the Passed option and the Inspection fails.
Required/Optional	Specify whether you want to make inspections required or optional. Each inspection that specify as Required must pass for the application to be complete.
Reschedule Restriction	<p>Select an option based on your agency's policy for rescheduling inspections. This restriction applies only to Citizen Access public users.</p> <p>If you want no restrictions on inspection rescheduling, select No Restriction.</p> <p>If you want to restrict inspection rescheduling, select Hours Prior or Days Prior and specify a time and date. For example, if you want to cut off inspection rescheduling at 11:00 AM one day prior to the inspection date, select Days Prior and choose One Day Prior at 11:00 AM in the associated drop-down lists.</p>
Result Group	Choose an existing group that you want to edit. See Working with Inspection Result Groups .
Total Score	<p>If you select the Subtracted sum of the scores option in the Inspection Score drop-down list, enter the total score from which to subtract the sum of the inspection sub scores for calculating the inspection total score.</p> <p>This field is not valid with other options in Inspection Score.</p>
Units	<p>Enter the number of inspection units used as criteria when automatically scheduling inspections. An inspection type unit indicates the shortest length of time it takes to complete an inspection. Civic Platform measures all inspections as multiples of the unit value. For example, you might determine that the unit value equals the duration of electrical inspections, 30 minutes. Civic Platform then measures all inspections in 30 minute increments: hour-long inspections are two units and ninety-minute inspections are three units.</p> <p>The unit value should relate to the default time block you configure in your inspection calendars.</p>

Editing an Inspection Type

After you add an inspection type to a group, you can change the type. For example, you can change the type name or the display order.

To edit an inspection type

1. Access the Classic Administration page ([Navigating to the Setup Portlet](#)).
2. Choose **Inspection > Inspection**.
3. Search for the inspection group that you want.
For instructions, see [Searching for an Inspection Group](#).
4. Click the **Inspection Group Code** link corresponding to the inspection for which you want to add an inspection type.
Complete the necessary fields as described in [Table 176: Inspection Group Fields](#).
5. Click **Update**.

Deleting an Inspection Type

After you add an inspection type to a group, you can delete a type.

To delete an inspection type

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Inspection**.
3. Search for the inspection group that you want.
For instructions, see [Searching for an Inspection Group](#).
4. Click the **Inspection Group Code** link corresponding to the inspection for which you want to add an inspection type.
5. Click **Delete** next to the **Inspection Type** that you want.
6. Click **OK**.

Assigning Disciplines to an Inspection Type

To assign disciplines to an inspection type:

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Inspection**.
3. Search for the inspection group that you want.
For instructions, see [Searching for an Inspection Group](#).
4. Click the red dot for the **Inspection Group Code** link corresponding to the inspection type you want to modify.
Refer to field descriptions in [Table 176: Inspection Group Fields](#).
5. Click the **Configuration** button at the far right side of the page.
The Configuration drop-down menu displays.



6. Click the **Inspection Disciplines** option.

Civic Platform displays the Inspection - Disciplines List.

7. Click the **Add** button on the **Disciplines** section of the Inspection Disciplines.

Civic Platform displays the Disciplines List.

8. Select each discipline that you want to assign to the inspection type. To choose all disciplines, click **Disciplines**.

9. Click **Submit**.

The selected districts display in the bottom section of the Inspection Disciplines List.'

To remove any of the listed disciplines click the corresponding **Delete** button located to the right of the discipline

10. Click **Cancel**.

Setting Up an Inspector Profile

Set up a user account and a user profile for an inspector in Civic Platform. This profile identifies the inspector, and provides details such as daily inspection maximums or units, districts, disciplines, and scheduling availability. You can then use this information to assign and schedule the appropriate inspector when automatically scheduling inspections. This profile also identifies the default start location, the default end location, and the default routing type for an optimized inspection route. You can create a batch job to generate the sequence of inspection route sheet items for each inspector based on this information.

Configure your agency's inspector profiles so inspectors get assignments to inspections that correspond to inspector units, districts, disciplines, and inspection calendars.

Daily inspector units reflect the number of inspections an inspector can conduct each day. For example, if an inspector has six hours available for inspections each day and each unit equals 30 minutes, then the inspector can accommodate twelve units per day.

To automatically schedule inspections, the feature must be active for each type of inspection. For information on how to turn this feature on, see [Establishing Inspection Types](#).

Topics

- [Identifying Daily Inspection Units](#)
- [Defining Location and Type Information for Inspection Routes](#)
- [Assigning and Unassigning Inspector Districts](#)
- [Assigning Inspection Disciplines](#)
- [Assigning a Calendar to an Inspector](#)

Identifying Daily Inspection Units

You can automatically assign and schedule inspectors by using the inspector profile information. When you configure inspector profiles you specify the maximum daily inspection units for an inspector, such as hours, number of inspections per day, or any type of unit, according to your agency's objectives and best practices. For example, if an agency identifies the daily inspections units as number of inspections per day and an inspector generally completes five fireplace inspections a day, the daily inspection unit is 5.

Inspection units must be consistent from one inspector to the next for automated inspection scheduling to work properly. These units form the basis of criteria for assigning an appropriate inspector.

To identify daily inspection units

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > User**.
3. Search for the user you want to work with and click the **User Information** link next to the user. Civic Platform displays the User - Information page.

The screenshot shows the 'User - Information' page. At the top, there is a 'User Information' section with fields for User Full Name (Adams, Thomas), User Login ID (TADAMS), and Status (ENABLE). Below this is a 'Daily Inspection Units' field, which is currently empty. There are also fields for Inspector Status (radio buttons for Enable and Disable, with Enable selected), Start Location, End Location, and Default Route Type. A 'Submit' button is located below these fields. Below the main section are several tabs: 'Districts' (Service: SAC_AGIS, GIS, Select District, No district), 'Disciplines' (User Discipline Name, Add, No Records Found), 'Inspector Calendars' (User Group Level, Add, No Records Found), and 'User Level' (Add, No Records Found).

4. Enter a value in the **Daily Inspection Units** field.
5. Click **Submit**.

Civic Platform updates the daily inspection units.

Defining Location and Type Information for Inspection Routes

You can define the start location, the end location, and the default routing type for an inspection route. And then create a batch job to generate the sequence of inspection route sheet items for each inspector based on this information. For more information about the batch job, see

To define location and type information for inspection routes

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > User**.
3. Search for the user you want to modify and click the **User Information** link next to the user. Civic Platform displays the User - Information page.

User - Information

User Information
User Full Name: Adams, Thomas
User Login ID: TADAMS
Status: ENABLE
Daily Inspection Units:
Inspector Status: <input checked="" type="radio"/> Enable <input type="radio"/> Disable
Start Location:
End Location:
Default Route Type: <input type="button" value="▼"/>
<input type="button" value="Submit"/>
Districts
Service: SAC_AGIS <input type="button" value="GIS"/> <input type="button" value="Select District"/>
No district.
Disciplines
User Discipline Name
No Records Found
<input type="button" value="Add"/>
Inspector Calendars
User Group Level
No Records Found
<input type="button" value="Add"/>
User Level
No Records Found
<input type="button" value="Add"/>

4. Complete these fields:

- | | |
|----------------------|---|
| Start Location | Enter the full address of the start location for an inspection route. For example, 1001 Adler CIR, Sacramento CA 95864. |
| End Location | Enter the full address of the end location for an inspection route. For example, 1001 Adler CIR, Sacramento CA 95864. |
| Default Routing Type | Enter the default routing type for inspection route optimization. |

5. Click **Submit.**

Assigning and Unassigning Inspector Districts

You can assign an inspector to one or more districts within their inspector profile. This information is a critical component when automatically scheduling inspections. Civic Platform uses this information when searching for an available inspector.

To assign or un-assign inspection districts

- Access the Classic Administration page ([Accessing Classic Administration](#)).
- Choose **User Profile > User**.
- Search for the user you want to work with and click the **User Information** link next to the user. Civic Platform displays the User - Information page.

User - Information

User Information
User Full Name: Adams, Thomas
User Login ID: TADAMS
Status: ENABLE
Daily Inspection Units:
Inspector Status: <input checked="" type="radio"/> Enable <input type="radio"/> Disable
Start Location:
End Location:
Default Route Type: <input type="button" value="▼"/>
<input type="button" value="Submit"/>
Districts
Service: SAC_AGIS <input type="button" value="GIS"/> <input type="button" value="Select District"/>
No district.
Disciplines
User Discipline Name
No Records Found
<input type="button" value="Add"/>
Inspector Calendars
User Group Level
No Records Found
<input type="button" value="Add"/>
User Level
No Records Found
<input type="button" value="Add"/>

4. To assign a district:

- Click the **Select District** button.

Civic Platform displays the User Districts - Add From Standard Choices page.

User Districts - Add From Standard Choices
Use this form to add User District from Standard Choices
User Login ID: TADAMS
All Available Districts
 District
 Alice_Districts
 Building Inspection Areas-2
 Building Inspection Areas-4
 Building_Inspection_Areas-1
 Building_Inspection_Areas-3

Submit Cancel

- Mark the appropriate check box next to each district that you want to assign to the inspector. To select all districts, mark the **District** check box.

- Click **Submit**.

The selected districts display in the bottom section of the User - Information page.

5. To remove any of the listed districts from the inspector's profile, click the corresponding **Delete** button located to the right of the district.

Assigning Inspection Disciplines

You can assign an inspector to one or more disciplines. Civic Platform uses these disciplines as criteria in searches for an applicable inspector when automatically scheduling inspections.

To assign inspection disciplines to an inspector

- Access the Classic Administration page ([Accessing Classic Administration](#)).
- Choose **User Profile > User**.
- Search for the user you want to work with and click the **User Information** link next to the user.

Civic Platform displays the User - Information page.

User - Information
User Information
User Full Name: Adams, Thomas
User Login ID: TADAMS
Status: ENABLE
Daily Inspection Units:
Inspector Status: Enable Disable
Start Location:
End Location:
Default Route Type: ▾

Submit

Districts	Service: SAC_AGIS ▾	GIS	Select District
No district.			
Disciplines			
User Discipline Name Add			
No Records Found			
Inspector Calendars			
User Group Level			
No Records Found			
User Level			
No Records Found			

- Click the **Add** button on the **Disciplines** section of the Inspector Profile.

Civic Platform displays the Disciplines List page.

Disciplines List
Use this form to add User Disciplines.

User Disciplines

<input type="checkbox"/>	Disciplines
<input type="checkbox"/>	Alice_DISCIPLINES
<input type="checkbox"/>	Building Inspection Areas
<input type="checkbox"/>	Building_Inspection_Areas
<input type="checkbox"/>	Health

Submit **Cancel**

5. Mark the appropriate check box next to each discipline that you want to assign to the inspector. To choose all disciplines, mark the **Disciplines** check box.
6. Click **Submit**.

The selected districts display in the bottom section of the User - Information page.



Note:

You can remove any of the listed disciplines from the inspector's profile by clicking **Delete**.

Assigning a Calendar to an Inspector

You can assign one or more calendars to an inspector. If you identify a calendar for a user group, the inspector automatically inherits the calendar and its availability and blackout days. You can associate additional calendars with the inspector at the user level. Civic Platform uses the user group and user level calendars to confirm the availability of an inspector when automatically scheduling inspections.

For more information on using calendars, see [Setting Up Calendars](#).

To assign a calendar to an inspector

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **User Profile > User**.
3. Search for the user you want to work with and click the **User Information** link next to the user.

Civic Platform displays the User - Information page.

User - Information

User Information

User Full Name:	Adams, Thomas
User Login ID:	TADAMS
Status:	ENABLE
Daily Inspection Units:	<input type="text"/>
Inspector Status:	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Start Location:	<input type="text"/>
End Location:	<input type="text"/>
Default Route Type:	<input type="text"/>

Submit

Districts

Service:	SAC_AGIS	GIS	Select District
No district.			

Disciplines

Add
No Records Found

Inspector Calendars

User Group Level
No Records Found

User Level

Add
No Records Found

4. Click the **Add** button on the User Level section under Inspector Calendars.

Civic Platform displays the Inspector Calendar - Search page.

Inspector Calendar - Search

Use this form to search for Inspector Calendars

Calendar Name:

Submit **Cancel**

5. Search for the calendar by entering a portion or all of the calendar name.
6. Click **Submit**.
Civic Platform displays the Inspector Calendar Search Result pop-up window.
7. Click **Select** next to the applicable inspector calendar you are looking for.
Civic Platform updates the Inspector Calendar - User Level section with the selected calendar and returns to the User - Information page.

Managing Inspection Scheduling

Topics

- [Setting Up Automatic Inspection Scheduling](#)
- [Defining Re-Schedule and Cancel Inspection Parameters](#)
- [Working with Recurring and Related Inspections](#)
- [Configuring Multiple Inspection Scheduling](#)
- [Understanding Same Day Next Day Inspection Scheduling](#)
- [Scheduling Requests and Pending Inspections](#)

Setting Up Automatic Inspection Scheduling

You can configure Civic Platform to automatically assign inspectors. Before automatic inspection scheduling can work properly, you must set up the inspector profile, inspection conditions (including inspection disciplines, districts, and calendar availability), and you must enable the automatic inspection scheduling feature.

When performing automatic inspection scheduling, Civic Platform checks for available inspectors meeting the conditions. The candidate inspectors display in the Inspector Calendar list with an order in which those most largely meet the conditions display on the top of those less able to meet the conditions.

You must configure the following to properly enable and use automatic inspection scheduling:

- Inspector districts: This feature enables Civic Platform to check the inspection districts of the applications against the inspectors' districts.
 - Civic Platform follows gets inspection district information in this order: (1) The inspection district setting of the parcel; (2) The inspection district setting of the address; (3) The inspection district that the parcel belongs to in the GIS map.

**Note:**

A parcel can overlap multiple GIS inspection districts. If you configure the Standard Choice GIS_BUFFER_DISTANCE, Civic Platform can artificially shrink the parcel to a degree, and get the inspection district that the major portion of the parcel maps to. For instructions on adding the Standard Choice, refer to the “Standard Choices Reference” chapter in the Civic Platform Configuration Reference.

- For configuring inspectors district, see [Assigning and Unassigning Inspector Districts](#).
- Inspection disciplines: This feature enables Civic Platform to check the discipline of the inspection type against the inspectors' districts. For configuration details, see [Assigning Disciplines to an Inspection Type](#).
- Inspector profiles: Each inspector has an inspector profile that contains their daily inspection units, district location, identified disciplines, and availability. Civic Platform checks this profile and the conditions identified for the inspection to assign the appropriate inspector. For configuration details, see [Setting Up an Inspector Profile](#).
- Configure inspection calendars: This feature enable Civic Platform to get the available dates and times from the inspection calendars with matching inspection type and district settings. For configuration details, see [Setting Up Automatic Inspection Scheduling](#).
- Enable automatic inspection scheduling, as described in the following procedure.

Enabling automated inspection scheduling:

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Inspection**.
3. Search for the inspection group code you want to activate auto assign.
4. Click the **Inspection Group Code** link corresponding to the inspection for which you want to activate auto assign.

For field descriptions see see [Table 176: Inspection Group Fields](#).

Civic Platform displays the Inspection-Edit page.

ACA Display	ACA Multi-Inspection Schedule	Auto Assign	Unit	Flow Enabled
<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Yes"/>	<input type="text" value="3"/>	<input type="button" value="Yes"/>
<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Yes"/>	<input type="text" value="4"/>	<input type="button" value="Yes"/>

5. Use the **Auto Assign** drop-down list for the inspection you want and select ‘Yes’ to activate the auto assign inspection feature.

6. Click **Update**.

Civic Platform turns on the auto assign feature for the inspection and returns to the Inspection -Edit window.

Defining Re-Schedule and Cancel Inspection Parameters

You can configure reschedule and cancel parameters to determine when inspections are eligible for rescheduling and cancelling from Citizen Access. Inspection type parameters control whether public users can reschedule or cancel inspections. This feature prevents public users from rescheduling or cancelling 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. Meaning that public users can only reschedule a Code Enforcement inspection until 5:00 PM the day before the inspection's scheduled date.

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, you can determine how each inspection type displays in Citizen Access using the Cancel Inspection in Citizen Access, Reschedule Inspection in Citizen Access, and Schedule Inspection in Citizen Access drop-down lists.

Select a value of Yes for the Reschedule Inspection in Citizen Access and Cancel Inspection in Citizen Access 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 Citizen Access and Cancel Inspection in Citizen Access drop-down lists if you do not want public users to have the option of rescheduling or cancelling inspections in ACA.

When you enable reschedule and cancel features, public users can only reschedule and cancel inspections based on the parameters you set for each inspection type.

For a complete description of how to configure inspection calendars for Citizen Access, see [Setting Up Inspection Calendars for Public Users](#).

To set inspection type reschedule and cancel parameters

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
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:

Inspection Group Name:

Submit

OR

Add

[New Inspection Group](#)

3. Complete the fields below or click **Submit** to search all inspection group codes:

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 **Submit**.

Civic Platform displays the search results on the Inspection-Browse page.

Inspection - Browse

Use this form to edit an Inspection Group.

Edit Inspection Group Code	Inspection Group Name(Default)	Inspection Group Name
• 0001	0001	0001
• AIVR	AIVR	AIVR
• ASI Security	ASI Security	ASI Security
• AutoAssign	AutoAssign	AutoAssign
• BLD_CALENDAR	Building With Calendar	Building With Calendar
• BLD_FLOW	BLD_FLOW	BLD_FLOW
• BLD_INSP_GRP	BLD_INSP_GRP	BLD_INSP_GRP
• BLD_NEW_DEMO	New Building	New Building
• BLD_NO_CALND	Building Without Calendar	Building Without Calendar
• BLD_NO_FLOW	BLD_NO_FLOW	BLD_NO_FLOW

◀ 1 2 3 4 5 6 7 8 9 ▶

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: **AutoAssign**
 Inspection Group Name(Default): **AutoAssign**
 Inspection Group Name * : **AutoAssign** **Inspection Flow**

Configure By: **Inspection Flow** **Inspection Milestone** **None**

Inspection Type(Default)	Inspection Type	Guide Sheet Group	Result Group
Fire inspect	Fire inspect	No group assigned	Electrical

Allow Failed Guidesheet Items: **Yes**

Capture and carry over failed guide sheet items: **None**

Reschedule Restriction: **No Restriction** Hours Prior **1** Days Prior **0** at **10** **AM**

Cancel Restriction: **No Restriction** Hours Prior **1** Days Prior **0** at **10** **AM**

- Select an option and set time values and date values for the Cancel Restriction and Reschedule Restriction fields. For a description of these fields, see [Table 176: Inspection Group Fields](#).

- Click **Update**.

Civic Platform updates the inspection type.

Inspection - Edit

Use this form to set up an Inspection Group.

Inspection Group Code: **AutoAssign**
 Inspection Group Name(Default): **AutoAssign**
 Inspection Group Name * : **AutoAssign** **Inspection Flow**

Configure By: **Inspection Flow** **Inspection Milestone** **None**

Inspection Type(Default)	Inspection Type	Guide Sheet Group	Result Group
Fire inspect	Fire inspect	No group assigned	Electrical

Allow Failed Guidesheet Items: **Yes**

Capture and carry over failed guide sheet items: **None**

Reschedule Restriction: **No Restriction** Hours Prior **1** Days Prior **0** at **10** **AM**

Cancel Restriction: **No Restriction** Hours Prior **1** Days Prior **0** at **10** **AM**

Working with Recurring and Related Inspections

You can configure a relationship between an inspection and one or more follow-up inspections. You can create an inspection as a child inspection of a parent inspection. You can also relate inspections manually. The recurring and related inspections functionality works together. From the inspection group code you add and configure inspection types, specifying related inspection groups and then setting up your agency's requirements to automate the scheduling of required inspections.

This section provides instructions for scheduling related inspections, based on the status of a previous inspection. Related inspections can be a follow-up or recurring inspections, based on the status of the original inspection type.

The first set of steps, from through enable you to configure statuses for inspection types so that when an inspection achieves that status, the inspection type automatically reschedules as a recurring annual inspection in one year. You set this type of recurring inspection by using the Next Recurring Inspection option in the Related Type field. For example, each year a restaurant is subject to annual food establishment inspections to ensure continued compliance with city ordinances.

If an inspection attains a negative status (e.g., Denied), you can use this procedure (start with) to create a related follow-up inspection. You might, for example, apply a follow-up inspection to occur in 15 days after the failure. Doing so gives the restaurant owner time to make any corrections and it can help ensure availability in the inspector's schedule. You set this type of recurring inspection by using the Status of Denied with the Follow-up Inspection option in the Related Type field.

To allow users to modify relationships, see [Relating Inspections](#).

To schedule a recurring inspection when it attains a certain status

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Inspection**.
3. Search for the inspection group that you want.
4. Click the red dot for the **Inspection Group Code** link corresponding to the inspection type you want to modify. The Inspection - Edit field descriptions are in [Table 176: Inspection Group Fields](#).

Civic Platform displays the Inspection - Edit screen.

Inspection - Edit
Use this form to set up an Inspection Group.

Inspection Group Code: AutoAssign
Inspection Group Name(Default): AutoAssign
Inspection Group Name *: AutoAssign Inspection Flow

Configure By: Inspection Flow Inspection Milestone None

Inspection Type(Default)	Inspection Type	Guide Sheet Group	Result Group
Fire inspect	Fire inspect	No group assigned	Electrical

Allow Failed Guidesheet Items: Yes

Capture and carry over failed guide sheet items: None

Reschedule Restriction: No Restriction Hours Prior 1 Days Prior 0 at _____ AM _____

Cancel Restriction: No Restriction Hours Prior 1 Days Prior 0 at _____ AM _____

5. Locate the Inspection Type. In this example, to automatically schedule the annual food establishment compliance inspection, click the **Configuration** button at the far right side of the page.

The Configuration drop-down menu displays.



6. Select the **Recurrence & Relationship Setting** option.

You can use disciplines as filtering criteria for automatic inspection scheduling. To use the Inspection Disciplines option, see [Assigning Inspection Disciplines](#). For more information on automatic inspection scheduling, see [Setting Up Automatic Inspection Scheduling](#).

The Inspection Recurrence & Relationship Setting page displays.

Inspection Type - Recurrence & Relationship Setting
Use this form to set Inspection Recurrence and Relationship.

Inspection Recurrence & Relationship Setting

Submit Help

Inspection Group: AutoAssign Inspection Type: Fire inspect

Related Inspections [Add Inspection Type](#)
No related inspection types have been added.

Cancel

7. Click the Add Inspection Type link.

The Add Related Inspection Type window displays.

Add Related Inspection Type

Inspection Group *: --Select--

Status *: --Select-- Not Relevant to Status

Inspection Type *: --Select--

Continue Cancel

8. Specify these required fields for the type of inspection: Status, Inspection Group, and Inspection Type. To continue with this example to automatically schedule the annual food establishment compliance inspection, set the **Status** to **Approved** and specify an appropriate Inspection Group and Inspection Type.

To bypass any Status on an inspection, select **Not Relevant to Status**. This means that no matter what the inspection status is, Civic Platform sets the inspection to the Next Recurring Inspection, and it initiates upon the creation of the next application.

9. Click Continue.

The Add Related Inspection Type window displays other fields.

Add Related Inspection Type

Settings for Electrical

Related Type *: Next Recurring Inspection

Initiate From: Completion Date of the Previous Inspection

Interval *: 6 Day(s)

Schedule # of Days Earlier *: 5 Day(s)

Finish Back Cancel

10.Specify these required fields: **Related Type**, **Interval**, and **Schedule # of Days Earlier**. To continue with this example to automatically schedule the annual food establishment compliance inspection, set the Related Type to the **Next Recurring Inspection** option. Doing so automatically sets when the inspection type is Initiated From which is the **Completion Date of the Previous Inspection**. You must enter the **Interval** using either 365 Days or 1 Year. You also need to enter the number of days prior to the interval that Civic Platform can schedule the inspection. Enter this number in the **Schedule # of Days Earlier** field.

11.Click **Finish**.

The inspection type displays under the Status - Approved list.

Inspection Group	Inspection Type	Related Type	Action
Electrical	Electrical	Recurring	Actions▼

[Add Another Inspection Type](#)

[Cancel](#)

12.Next, configure the follow-up inspection if the inspection achieves a status of Fail. Doing so automates the scheduling for the annual building structure inspection.

13.Click the **Add Inspection Type** link.

The Add Related Inspection Type window displays.

Inspection Group *	HouseBuild
Status *	Fail
<input type="checkbox"/> Not Relevant to Status	
Inspection Type *	Final Electrical

[Continue](#) [Cancel](#)

14.Specify these required fields for the type of inspection: **Status**, **Inspection Group**, and **Inspection Type**. To continue with this example to automatically schedule the annual food establishment compliance inspection, set the **Status** to **Denied** and specify an appropriate Inspection Group and Inspection Type.

15.Click **Continue**.

The Add Related Inspection Type displays.

Add Another Inspection Type

Settings for Final Electrical

Related Type *
Follow-up Inspection

Follow-up Method *
Automatically

of Days Later *
15 Day(s)

Finish Back Cancel

- 16.**Specify these required fields: **Related Type**, **Follow Up Method**, and the**# of Days Later**. To continue with this example to automatically schedule the annual food establishment compliance inspection, set the Related Type to the **Follow-up Inspection** option. Doing so sets the **Follow-up Method** to automatically. Enter 15 days for the number in the **# of Days Later** field. Doing so means Civic Platform automatically schedules the follow-up inspection for 15 days after the inspection status reaches Denied. Alternately, you can specify Prompt in the **Follow-up Method** field to require the user to acknowledge the rescheduling.

17.Click **Finish**.

Civic Platform displays all recurring and related inspection settings.

Inspection Recurrence & Relationship Setting

Submit Help

Inspection Group	Inspection Type
AutoAssign	Fire inspect

Related Inspections Add Inspection Type

Status - Pass			
Inspection Group	Inspection Type	Related Type	Actions
Electrical	Electrical	Recurring	Actions

Add Another Inspection Type

Status - Fail			
Inspection Group	Inspection Type	Related Type	Actions
HouseBuild	Final Electrical	Follow-up	Actions

Add Another Inspection Type

Cancel

18.Click **Submit**.

Civic Platform saves all related inspection type data.

Relating Inspections

You can relate an inspection manually to another inspection in a relationship. When a daily user accesses the Inspection Detail page the parent with child inspections displays caret signs next to it, like so: >>. In the Related Inspections tab it lists a hierarchy with parent and related child inspections that provide a visual of related inspections and reportable linkage between inspections to allow you to differentiate the parent inspection from its follow-up inspections.

A menu item populates as shown in [Figure 64: Schedule Related Inspections Menu Option](#).

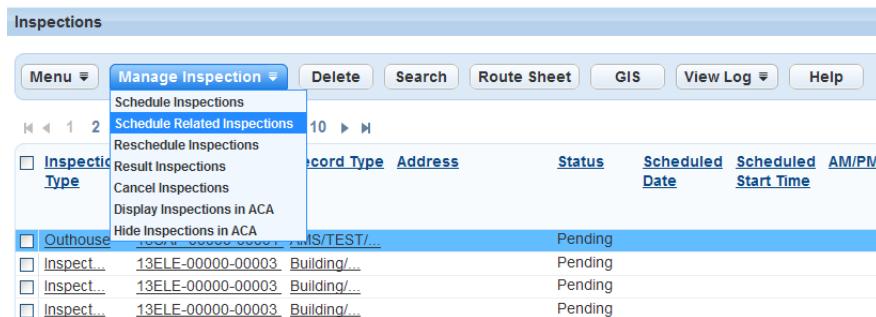


Figure 64: Schedule Related Inspections Menu Option

Configuring Multiple Inspection Scheduling

Civic Platform provides a way for your agency to allow public users to schedule or re-schedule inspections. When your agency implements Citizen Access, you can provide public users with the ability to request/schedule multiple or repeat inspections. For example, a contractor might require multiple concrete pours for a large project and thus require numerous concrete inspections. This feature allows the contractor to schedule multiple concrete inspections for their project based on their pour days.

To implement this feature, you must set the Citizen Access Multi-Inspection Schedule field to Yes for an Inspection type. See [Table 176: Inspection Group Fields](#). Then, you must enable multiple inspection scheduling for a module in Citizen Access Configuration on the Module Settings page. If you do not enable multiple inspection scheduling for a module in Citizen Access, public users do not have the ability to schedule multiple inspections for an inspection type, even if the configuration in Civic Platform allows for it. For complete configuration instructions for this feature, see the “Managing Inspections” section in the *Citizen Access Administrator Guide*.

Understanding Same Day Next Day Inspection Scheduling

You can specify how public users schedule inspections online by configuring inspection calendars. Civic Platform provides different inspection scheduling configuration options, including same day and next business day scheduling. This section describes the steps necessary to configure inspection scheduling for Citizen Access.

The configuration that you complete in Civic Platform affects the inspection scheduling options in Citizen Access. In Civic Platform, you set the scheduling options for each inspection type. For example, if you want to give public users the option of choosing the date and time on which they schedule an inspection, then set the calendar display by configuring the dates and times from which public users can choose. You can also configure inspection scheduling so that public users can only choose from three inspection scheduling options: Same Day, Next Business Day, and Next Available Day. When public users choose one of these three scheduling options, Civic Platform schedules the inspection on the date and time that best match the selected option.

Scheduling Requests and Pending Inspections

Civic Platform provides the ability to manage inspection scheduling for public users and user groups. You do this through the request/pending inspection feature for Civic Platform and Citizen Access. This feature allows a public user to request an inspection date. Civic Platform does not set the appointment, but it sets a flag on the inspection and assigns a pending status to it until the agency approves the inspection date and time.

For example, a public user logs into their Citizen Access account and requests a plumbing inspection on September 6th during AM hours. After the public user submits their request through Citizen Access, the inspection maintains a pending status until the agency approves the inspection appointment by using the inspection calendar. Upon approval, Civic Platform uses EMSE to send an email confirmation of the inspection appointment to the public user.

Users can view which inspections are in the pending status at any time by filtering the Inspection Calendar to show Requested Pending Inspections. You can view approved inspections in the inspection list by selecting All Inspections in the Calendar Show drop-down list.

Administrators must do the following configuration tasks in Civic Platform to implement the request and pending feature. First, you must pre-define the inspection types and must set the scheduling parameters. Then, you must navigate to the inspection type tab in the inspection calendar administrator portlet and choose the Request Only - Pending option from the Schedule Inspection in Citizen Access 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 in Citizen Access. Then, you must navigate to the Content Customize portlet to define the emails to use for the request and pending feature.

Administrators must also can navigate to a Module in Citizen Access Configuration and customize the content or labels to use with the modular inspection scheduling web page. For additional information on customizing web pages and complete inspection scheduling configuration details for Citizen Access, refer to the *Citizen Access Administrator Guide*.

To configure request only and pending inspections

1. As a prerequisite, verify that you have correctly defined each inspection type and inspection schedule parameter. For information on how to configure inspection types, refer to [Establishing Inspection Types](#).
2. Configure Request Only-Pending scheduling option for Inspection Types in the Inspection Calendar.
 - a. Click the **Admin** primary tab.
 - b. Navigate to the inspection calendar portlet and click the **Inspection Type** tab.
Civic Platform displays the inspection calendar details.
 - c. Choose the **Request Only - Pending** option from the **Schedule Inspection in Accela CitizenAccess** drop-down list for those inspections to which you want to apply the request only feature.

The screenshot shows two Civic Platform screens related to inspection configuration:

- Top Screen (Inspection Calendar):** Shows a table with one row: "ACA_Commercial_Inspect..." (Type: INSPECTION, Status: Active). Buttons include: Menu, Search, New, Delete, Help, Calendar, Daily, Weekly, Monthly.
- Bottom Screen (Inspection Type):** Shows a table with multiple rows under "BLD Commercial". The columns are: Inspection Group, Inspection Type, Schedule Inspection In ACA, Cancel Inspection In ACA, Reschedule Inspection in ACA. The "Schedule Inspection In ACA" dropdown is set to "Request Only - Pending" for all items. Buttons include: Menu, Submit, Assign, Delete, Help, Details, Districts, Permissions, Inspection Types.

- d. Click **Submit**.
3. Customize related emails.
 - a. Click the **Admin** primary tab.
 - b. Navigate to the **Content Customize** portlet.
Civic Platform displays the Content Customize portlet.
 - c. Configure the email sent to the public user after they request an inspection online.
ACA_EMAIL_INSPECTION_STATUS_CHANGE_CONTENT

ACA_EMAIL_INSPECTION_STATUS_CHANGE SUBJECT

- d. Configure the email 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 a module in Citizen Access Configuration. For steps, refer to “Working With Web Pages” in the *Citizen Access Administrator Guide*.

Working with Inspection Result Groups

Inspection result groups let you set up predefined results for inspections. In an inspection result group, you can divide inspection results into several ranges based on the inspection scores and the number of major violations. You can then map each range to an inspection status of “result” in the inspection result group.

Topics

- Creating an Inspection Results Group
- Adding a Result to an Inspection Results Group
- Editing an Inspection Results Group

Creating an Inspection Result Group

You can add inspection result groups to the groups you already have. When you create an inspection result group you must add at least one result. Otherwise, Civic Platform does not save the new inspection result group.

To create an inspection result group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
 2. Choose **Inspection > Inspection Result Group**.
 3. Click **Add**.
 4. Type in the **Group Name** that you want to add.
 5. Click **Save**.
- Civic Platform displays the Inspection Results group - Edit screen.
6. Add results to the new results group as needed. For instructions, see [Adding a Result to an Inspection Result Group](#).

Adding a Result to an Inspection Result Group

After you create an inspection result group, you can add more results to that group.

To add a result to an inspection result group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Inspection Result Group**.

3. Click **Edit** next to the group you want.
4. Click **Add**.
5. Type in the **Result** that you want to add.
6. Click **Save**.
7. Add more results by repeating step 3 as needed.
8. Click **Update**.

Editing an Inspection Result Group

After you set up an inspection result group, you can edit its results.

To edit an inspection result group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Inspection Result Group**.
3. Click **Edit** next to the group you want.
4. To delete an inspection result, click its **Delete** button.
5. To edit an inspection result, complete the fields [Table 177: Inspection Result Fields](#).
6. Click **Update**.

Table 177: Inspection Result Fields

Result	Enter the name of the inspection result.
Display Order	Enter a number to determine the position of the inspection result within a list of results. For example, if you want to display one result before another result, enter "1."
Result Type	Select the Result type from the drop-down list that you want. There are three options: Approved, Denied and Pending. Only when a user results an inspection to an approved or denied status, Civic Platform regards the inspection as completed.
Display in Citizen Access	Select the option you want to display in the Food Facility Inspection Details page in Citizen Access. ScoreThe total scores of the checklists associated with the inspection. ResultThe inspection result. BothDisplay both the Score field and the Result fields. NoneDo not display the Score field or the Result field.
Maximum Score Minimum Score	Set the inspection score range that the Result maps to. If you set both the inspection score range and the major violation range (Maximum Major Violation and Minimum Major Violation) for a result, Civic Platform links the ranges by the AND logical conjunction before mapping to the result. If the score and the major violation range does not fit with any result, the inspection result (status) displays nothing.
Maximum Major Violation Minimum Major Violation	Set the range of the number of major violations that the Result maps to. If you set both the inspection score range (Maximum Score and Minimum Score) and the major violation range for a result, Civic Platform links the ranges by the AND logical conjunction before mapping to the result. If the score and the major violation range do not fit with any result, the inspection result (status) displays nothing.

Working with Inspection Grade Groups

Inspection grade groups let you set up predefined grades for inspections. In an inspection grade group, you can divide inspection results to several ranges based on the inspection scores and the number of major violations. You can then map each range to an inspection grade.

Topics

- [Creating an Inspection Grade Group](#)
- [Adding a Grade to an Inspection Grade Group](#)
- [Editing an Inspection Grade Group](#)

Creating an Inspection Grade Group

To create an inspection grade group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Inspection Grade Group**.
3. Click **New** in the Grade Group List.
4. Type in the **Grade Group** that you want to add, create a **Grade**, and complete the fields described in [Table 178: Inspection Grade Fields](#).
5. Click **Submit**.
Civic Platform adds the new grade group to the Grade Group List.
6. Add more grades to the new grade group as needed. For instructions, see [Adding a Grade to an Inspection Grade Group](#).

Adding a Grade to an Inspection Grade Group

After you create an inspection grade group, you can add more grades to that group.

To add a grade to an inspection grade group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Inspection Grade Group**.
3. Click the link at the grade group name to which you want to add a grade.
Civic Platform displays the grade details of the group in the Grade List.
4. Click **New**.
5. Type in the **Grade** that you want to add. Complete the fields described in [Table 178: Inspection Grade Fields](#).
6. Click **Submit**.
7. Add more grades by repeating step 3 as needed.

Editing an Inspection Grade Group

After you set up an inspection grade group, you can edit its grades.

To edit an inspection grade group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Inspection Grade Group**.
3. Click the **link of the grade group** to which you want to edit.

Civic Platform displays the grade details of the group in the Grade List.

Grade Group	Grade	Maximum Score	Minimum Score	Maximum Major Violations	Minimum Major Violations	Grade Image
RHI_GRADE_GRP_A	A	100	91			Grade A
RHI_GRADE_GRP_B	B	90	81			Grade B
RHI_GRADE_GRP_C	C	80	0			Grade C

4. To delete an inspection grade, select it and click **Delete**.
5. To edit an inspection grade, click the grade name, and then edit the grade fields in the Grade Form. For field descriptions of the Grade Form refer to [Table 178: Inspection Grade Fields](#).

Grade Form		
<input type="button" value="Submit"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/>		
Grade Group *	RHI_GRADE_GRP	
Grade *	<input type="text" value="C"/>	
Minimum Score	<input type="text" value="0"/>	
Grade Image	Grade C	
Maximum Score	<input type="text" value="80"/>	
Minimum Major Violations	<input type="text"/>	

6. Click **Submit**.

Table 178: Inspection Grade Fields

Grade	Enter the name of the inspection grade.
Grade Image	Click the Associate Image link to associate an image to the inspection grade.
Maximum Score Minimum Score	Set the inspection score range that the Grade maps to. If you set both the inspection score range and the major violation range (Upper Major Violation and Lower Major Violation) for a grade, Civic Platform links the ranges by the AND logical conjunction before mapping to the grade. If the score and the major violation range do not fit with any grade, the inspection grade displays nothing.
Maximum Major Violation Minimum Major Violation	Set the range of the number of major violations that the Result maps to. If you set both the inspection score range (Upper Score and Lower Score) and the major violation range for a grade, Civic Platform links the ranges by the AND logical conjunction before mapping to the grade. If the score and the major violation range does not fit with any grade, the inspection grade displays nothing.

Managing Checklist Groups

A checklist group is a collection of checklists. You can associate a checklist group with an inspection type or a document type, so that inspectors or document reviewers perform their inspections or review tasks following the checklists in the checklist group.

Topics

- [Creating a Checklist Group](#)
- [Editing a Checklist Group](#)
- [Removing a Checklist from a Group](#)

Creating a Checklist Group

You first create a checklist group and then add individual checklists to the group. You must create a checklist before you can add to a checklist group. For instructions, see [Creating a Checklist](#). A checklist can belong to only one checklist group.

To create a checklist group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).

2. Choose **Inspection > Checklist Group**.

Civic Platform displays the Checklist Group—List window.

3. Click **Add**.

Civic Platform displays the Checklist Group—Add window.

4. Enter the new group name in the **Group Name** field.

5. Click **Submit**.

Civic Platform displays the Checklist Group—Edit window.

6. Click **Add**.

Civic Platform displays the Add Checklist to Group window.

7. Select the checklists that you want to add to the group.

8. Click **Add**.

9. Update these fields:

Display Order

Enables you to sort the checklists in the order you specify.

Auto Create

If you enable Auto Create, if the checklist group is associated with an inspection type, Civic Platform automatically add the checklist to inspections of the inspection type; if the checklist group is associated with a document type, Civic Platform automatically adds the checklist as document review checklist for documents of the document type.

Ad Hoc

Not currently used.

10. If you made changes, click **Update**.

11. Click **Add**.

Editing a Checklist Group

You can change the checklists that appear in a group or the order in which checklists appear in a group.

To edit a checklist group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Checklist Group**.
3. Click Edit next to the name of the group you want to edit.
Civic Platform displays the Checklist Group—Edit window.
4. Update these fields:

Display Order	Enables you to sort the checklists in the order you specify.
Auto Create	When Auto Create is enabled, if the checklist group is associated with an inspection type, Civic Platform automatically adds the checklist to inspections of the inspection type. If the checklist group is associated with a document type, Civic Platform automatically adds the checklist as a document review checklist for documents of the document type.
Ad Hoc	<i>Not currently used.</i>
5. Click **Update**.

Adding a Checklist to a Group

You can add additional checklists to a checklist group. You must create a checklist before you can add to a checklist group. For instructions, see [Creating a Checklist](#). A checklist can belong to only one checklist group.

To add a checklist to a group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Checklist Group**.
3. Click Edit to the right of the group that you want.
Civic Platform displays the Checklist Group—Edit window.
4. Click **Add**.
Civic Platform displays the Add Checklist to Group window.
5. Select the checklist that you want to add to the group.
6. Click **Add**.

Removing a Checklist from a Group

If you no longer want a checklist within a particular group, you can remove it, enabling you to associate a checklist with a different group.

To remove a checklist from a group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Inspection > Checklist Group**.
3. Click Edit next to the group name.

4. Click **Remove** next to the checklist you want to remove.
5. Click **OK**.

**Note:**

These steps remove the checklist from the current group only. You can still add the checklist to another group. To add a checklist to another group, see [Adding a Checklist to a Group](#).

Establishing Checklists

Topics

- [Creating a Checklist](#)
- [Editing a Checklist](#)
- [Deleting a Checklist](#)
- [Working with Checklists](#)
- [Carrying Over Failed Checklist Items](#)

Creating a Checklist

You can create checklists and add them to your system as necessary. Users can choose from any checklists defined on your system to help them complete a certain inspection or document review. When you add a checklist, you must set up the values you want to appear in the individual checklist items. For instructions, see [Adding an Item to a Checklist](#).

To create a checklist

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Checklist**.

Civic Platform displays the Reference Checklist page.

Order	Title	Default Comment	Required	Carry Over Failed Items	Major Violation/Critical Item	Default Status	Default Score	Max Points	Application Spec Info Group
1	checklist test1	default comment test1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No	100	300	

3. Click the **Add** button next to the **Checklist** drop down list.

Civic Platform displays the Reference Checklist—Add page.

Reference Checklist - Add

Use this form to add new Reference Checklist

Checklist Name * :

Save **Cancel**

4. Enter the name of the checklist in the **Checklist Name** field.

5. Click **Save**.

Civic Platform adds the new checklist and displays the Reference Checklist page.

- Add one or more items. For instructions, see [Adding an Item to a Checklist](#).

Editing a Checklist

After you create a checklist you can determine the sequence order of checklist items; add title (guide text) for the user; set defaults for comments, statuses, and scores; and set a points threshold for inspections. To change a checklist item, see [Working with Checklists](#).

To edit a checklist

- Access the Classic Administration page ([Accessing Classic Administration](#)).

- Choose **Inspection > Checklist**.

Civic Platform displays the Reference Checklist page.

Order	Title	Default Comment	Required	Carry Over Failed Items	Major Violation/Critical Item	Default Status	Default Score	Max Points	Application Spec Info Group	Add
	checklist test1	default comment test1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No	100	300		<button>Edit</button> <button>Delete</button>

- Choose the checklist that you want from the **Checklist** drop-down list.
- Update the fields for each checklist item as described in [Table 179: Checklist Fields](#).

Table 179: Checklist Fields

Custom Fields Group	Select the Custom Fields group you want to display for the checklist item. The Custom Fields Group might not be visible, depending on the settings for the reference checklist item. For more information, see Associating Checklist Items with Custom Fields Groups .
Carry Over Failed Items	Select this option to indicate that you want the item to automatically appear on a new checklist if it fails (the user results the item with a denied status). If the item fails in a checklist for an inspection, the item is transferred to the next inspection(s) that users schedule on the record (in either Civic Platform or Citizen Access). If the item fails in a checklist for a document review task, the item is transferred to the document that users resubmit.
Default Comment	Enter a default comment to display in the Comment field. The Default Comment might not be visible, depending on the settings for the reference checklist item.
Default Status	Choose the default status from the drop-down list. This status appears in the status field for any inspection or document review task that uses this checklist, and the user can modify it. The default status might not be visible, depending on the settings for the reference checklist item.
Default Score	Choose a default score from the drop-down list. This is a number that appears in the score field for any inspection that uses this checklist, but the user can modify it in the specific inspection. The default score might not be visible, depending on the settings for the reference checklist item.
Title	Enter a question or provide instructions for the user.

Major Violation/Critical Item	Select this option if you want to display the “Major Violation” check box for the checklist item. If users select a status for a “Major Violation/Critical Item” checklist item, Civic Platform applies the critical score of the status for the checklist item. If users select a status for a non-“Major Violation/Critical Item” checklist item, Civic Platform applies the non-critical score of the status for the checklist item. Civic Platform automatically assigns the “Major Violation” status for the checklist item, only when you select a “Major Violation” status for a “Major Violation/Critical Item” checklist item.
Max Points	If desired, enter the maximum number of points allowed before this type of inspection cannot pass.
Order	Enter the sequence in which Civic Platform should display the different checklist items. If multiple items share the same order number, Civic Platform reorders duplicate sequence numbers by increasing duplicates by one.
Required	Select this option if you want the checklist item to be required in the checklist. During inspections, inspectors must specify the status and score for every required checklist item in a checklist to complete the checklist. During document reviews, reviewers must complete all the required checklist items in a document review task (that is, setting their statuses to an Approved result type) before updating the task to a status that the Standard Choice for the document review status group specifies as validation required.

Deleting a Checklist

If you no longer want users to follow a certain checklist when recording inspection or document review results, you can delete it from your system.

To delete a checklist

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Checklist**.
Civic Platform displays the Reference Checklist window.
3. Use the **Checklist** drop-down list to choose the checklist that you want.
4. Click **Delete**.
Civic Platform displays a confirmation.
5. Click **OK**.

Working with Checklists

Topics

- [Adding an Item to a Checklist](#)
- [Editing an Item on a Checklist](#)
- [Deleting an Item from a Checklist](#)
- [Associating Checklist Items with Custom Fields Groups](#)
- [Managing Checklist Status Groups](#)

Adding an Item to a Checklist

After you create a checklist, you should add at least one checklist item. At any time, you can add and delete checklist items.

To add an item to a checklist

- Access the Classic Administration page ([Accessing Classic Administration](#)).

- Choose **Inspection > Checklist**.

Civic Platform displays the Reference Checklist page.

Order	Title	Default Comment	Required	Carry Over Failed Items	Major Violation/Critical Item	Default Status	Default Score	Max Points	Application Spec Info Group
1	checklist test1	default comment test1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No	100	300	

Save Cancel

- Use the **Checklist** drop-down list to choose the checklist that you want to work with.

- Click the **Add** button that appears to the right of the **Checklist Items** section.

Civic Platform displays the Reference Checklist Item—Add page.

Reference Checklist Item - Add

Use this form to add new Reference Checklist Item

Checklist: App Guidesheet

Title: (max 2000 characters)

Status Group: 22

Status Visible:

Score Visible:

Comment Visible:

Max Points Visible:

Application Spec Info Group Visible:

Save Cancel

- Complete the fields as described in [Table 180: Checklist Item Fields](#).

- Click **Save**.

Table 180: Checklist Item Fields

Title	Enter the details about the item as you want it to display to users. You can use this text to ask a question, or provide instructions. For example, you can ask the inspector whether the builder used approved building materials.
Status Group	Select the status group, or click Add or Edit . to choose the values that users see in a status drop-down list. You can choose a group of statuses from the drop-down list, edit the list to meet your needs, or add a new group of selections that users can choose from. For instructions, see Creating a Status Group .
Status Visible	Select this option if you want the status drop-down list visible.
Score Visible	Select this option if you want the score value visible.
Comment Visible	Select this option if you want the comment box with your comments visible.
Max Points Visible	Select this option if you want the Max Points column to display on the Admin Checklist Item and Daily Checklist Detail pages. If you select this option, you must also select the Score Visible option.

Custom Fields Group Visible	Select this option if you want the application-specific information group fields to display on the Admin Checklist Item and Daily Checklist Detail pages. For more information, see Associating Checklist Items with Custom Fields Groups .
-----------------------------	---

Editing an Item on a Checklist

If you want to change one of the items in a checklist, you can edit it. To change the checklist itself, see [Editing a Checklist Group](#).

To edit an item from on a checklist

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Checklist**.

Civic Platform displays the Reference Checklist page.

The screenshot shows a table titled 'Checklist Items' with one row. The columns are: Order (1), Title ('checklist test1'), Default Comment ('default comment test1'), Required (checkbox checked), Carry Over Failed Items (checkbox checked), Major Violation/Critical Item (checkbox checked), Default Status ('No'), Default Score ('100'), Max Points ('300'), Application Spec Info Group (empty), and Action buttons (Edit, Delete). Below the table are 'Save' and 'Cancel' buttons.

3. Use the **Checklist** drop-down list to choose the checklist that you want.
4. Click **Edit** next to the item you want.

Civic Platform displays the Reference Checklist Item—Add page.

The screenshot shows the 'Reference Checklist Item - Edit' form. It includes fields for Checklist (App Guideshet), Title ('checklist test1'), Status Group ('Unlicensed Business'), Status Visible (checkbox checked), Score Visible (checkbox checked), Comment Visible (checkbox checked), Max Points Visible (checkbox checked), Application Spec Info Group Visible (checkbox checked), and Save/Cancel buttons.

5. Complete the fields as described in [Table 180: Checklist Item Fields](#).
6. Click **Save**.

Deleting an Item from a Checklist

If you no longer want to include a certain item on a checklist, you can delete it. When recording inspection results, users are no longer able to see any item that you delete.

To delete an item from a checklist

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Checklist**.

Civic Platform displays the Reference Checklist page.

The screenshot shows a table-based form for editing a checklist item. The columns are labeled: Order, Title, Default Comment, Required, Carry Over Failed Items, Major Violation/Critical Item, Default Status, Default Score, Max Points, Application Spec Info Group. A single row is present with the following values: Order 1, Title 'checklist test1', Default Comment 'default comment test1', Required checked, Carry Over Failed Items checked, Major Violation/Critical Item checked, Default Status dropdown set to 'No', Default Score 100, Max Points 300, and Application Spec Info Group empty. There are buttons for Save, Cancel, and Delete.

3. Use the **Checklist** drop-down list to choose the checklist that you want.
4. Click **Delete** next to the checklist item that you want to delete.
Civic Platform displays a confirmation.
5. Click **OK**.

Associating Checklist Items with Custom Fields Groups

Administrators can customize checklist item templates by associating the item with a Custom Fields group. Checklist items are the actual specifications on a checklist. For example, an Electrical checklist might contain items necessary for the inspector to pass off, such as Required Lighting Outlets, Required Branch Circuits, and Ground Fault Protection. When you attach a Custom Fields group to a checklist item, the information determined within the custom field displays on the checklist as an additional field.

With this feature, you can use Custom Field and Custom List definitions for checklist items such as fields, lists, and check boxes. Custom Fields add a single line to the checklist item, and Custom Lists add multiple options. This enables you to associate the Custom Fields group code to a record type or checklist item. You can arrange these Custom Fields items according to your agency's preferences with the Form Layout Editor.

To associate a checklist item template to a Custom Fields group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Checklist**.
Civic Platform displays the Reference Checklist page.
3. Locate the existing checklist that contains the item you want to associate to the Custom Fields group, or create a new checklist. For example, you want to associate the Required Lighting Outlets with a Custom Fields group that contains the option to enter the number of lighting outlets currently installed and the total number of outlets.
For instructions on creating a new checklist, see [Creating a Checklist](#).
Civic Platform displays the selected checklist.
4. Add a new or edit an existing checklist item by clicking the **Add** button or the **Edit** button next to the Checklist Item.
Civic Platform displays the Reference Checklist Item - Add or Reference Checklist Item - Edit page.
5. Select **Custom Fields Group Visible** and click **Save**. Update the other fields as necessary.
For a description of the fields, see [Table 180: Checklist Item Fields](#).
Civic Platform displays the Custom Fields Group field next to the checklist item on the Reference Checklist page.

The screenshot shows a table-based form for editing a checklist item. The columns are labeled: Order, Title, Default Comment, Required, Carry Over Failed Items, Major Violation/Critical Item, Default Status, Default Score, Max Points, Application Spec Info Group. A single row is present with the following values: Order 1, Title 'checklist test1', Default Comment 'default comment test1', Required checked, Carry Over Failed Items checked, Major Violation/Critical Item checked, Default Status dropdown set to 'No', Default Score 100, Max Points 300, and Application Spec Info Group empty. There are buttons for Save, Cancel, and Delete.

6. Click **Search** to locate the Custom Fields group you want to associate with the checklist item template.



Note:

If Civic Platform displays the Custom Fields group in the field, you cannot search for another unless you delete the current Custom Fields group.

Civic Platform displays the Custom Fields - Browse screen.

The screenshot shows a web browser window titled "Application Specific Info - Browse". The URL is https://www.accela.com:52443/i18n/admin/index.cfm?FUSEACTION=RefGSheetList42ForSearchASI&i=Window. The page contains a table with columns "Application Spec Info Group Code" and "Subgroups". The rows list various groups like ABANDVEHICAL, ALAN, ANNY, APPTEST, ASI GROUP, ASI SECURITY, ASI-FOR-DEM, ASI-FOR-DEMO, ASI-TN, and ASI2156, each with their respective subgroups and a "Select" button. At the bottom are navigation buttons for page 1 to 10 and a "Search" button.

7. Click **Select** next to the Custom Fields group you want to associate with the checklist item.

Civic Platform displays the group in the Custom Fields Group field.

The screenshot shows a "Checklist Items" screen. A checklist item titled "checklist test1" has its "Application Spec Info Group" field set to "B.MASTERPLAN". Other fields include "Title" (checklist test1), "Default Comment" (default comment test1), "Required" (unchecked), "Carry Over Failed Items" (unchecked), "Major Violation/Critical Item" (checked), "Default Status" (No), "Default Score" (100), and "Max Points" (300). Buttons at the bottom include "Save" and "Cancel".

8. Edit the Custom Fields group as necessary.

9. Click **Save**.

Managing Checklist Status Groups

Checklist status groups allow you to have more than one set of status values for users to choose from when they complete a checklist. You can set up any number of statuses and group them together.

The status is like a disposition, or result, for a particular checklist item. You can assign scores to statuses. When users select a status for a checklist item, the score of the status automatically fills in the score of the checklist item. You can set a status as a major violation. When users select a "Major Violation" status for a "Major Violation/Critical Item" checklist item, the number of major violations in an inspection increments by 1.

After you create a checklist status group, you can associate it with a particular checklist item. For instructions, see [Associating a Status Group to a Checklist Item](#).

Topics

- [Creating a Status Group](#)
- [Associating a Status Group to a Checklist Item](#)
- [Editing a Status Group for a Checklist Item](#)

Creating a Status Group

To associate a status group with a checklist item, you must first create the status group. You can create more than one status group for any checklist item, but you can associate only one status group with a checklist item at any one time.

You can reuse checklist item status groups, so create an easily identifiable name. For example, you might name a checklist item status group YES NO if the options are “yes” and “no.”

To create a status group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Checklist**.

Civic Platform displays the Reference Checklist window.

3. Use the **Checklist** drop-down list to choose the checklist that you want.
4. Click **Edit** next to the item you want.

Civic Platform displays the Reference Checklist Item—Edit window.

Reference Checklist Item - Edit
Use this form to edit Reference Checklist Item

Checklist: App Guidesheet
Title: checklist test1
(max 2000 characters)

Status Group: Unlicensed Business

Status Visible:
Score Visible:
Comment Visible:
Max Points Visible:
Application Spec Info Group Visible:

5. Click the **Add** button next to the **Status Group** drop-down list.

Civic Platform displays the Checklist Item Status Group—Add page.

Checklist Item Status Group - Add
Use this form to add a Checklist Item Status Group

Status Group Name * :

6. Enter the Status Group Name that you want.

7. Click **Save**.

Civic Platform displays the Checklist Item Status Group—Edit page.

Checklist Item Status Group - Edit
Use this form to set up a Checklist Item Status Group.

Status Group Name: PASS_FAIL

Status	Display Order	Result Type *	Critical Score	Non-Critical Score	Major Violation LHS
<input type="button" value="Update"/> <input type="button" value="Add"/> <input type="button" value="Cancel"/>					

8. Click **Add**.

Civic Platform displays the Add Status to Checklist Item Status Group page.

Add Status to Checklist Item Status Group

Status Group Name: **PASS_FAIL**

Status * :	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

9. Enter the name of the new status in the **Status** field.

10. Click **Save**.

Civic Platform displays the Checklist Item Status Group—Edit window.

Checklist Item Status Group - Edit
Use this form to set up a Checklist Item Status Group.

Status Group Name: **PASS_FAIL**

Status	Display Order	Result Type *	Critical Score	Non-Critical Score	Major Violation	LHS
Pass	1	Approved	✓ 10		<input type="checkbox"/>	<input type="checkbox"/> <input type="button" value="Delete"/>

11. Complete the fields as described in [Table 181: Checklist Item Status Fields](#).

12. Click **Save**.

13. Click **Update**.

14. Click **Cancel** to return to the Edit window.

Table 181: Checklist Item Status Fields

Critical Score	Enter the critical score for the status. If a checklist item is a “Major Violation/Critical Item” in the reference checklist, when users select a status for the checklist item, the critical score of the status automatically fills in the score of the checklist item.
Display Order	Enter a number to indicate the position of this status within the list.
LHS	Select this option to designate the checklist item as LHS (Life/Health/Safety). For LHS-type items, the maximum point value becomes the default score. Inspectors can edit the number.
Major Violation	Specify whether or not a status is major violation. If a status is a major violation, when users select the status for a “Major Violation/Critical Item” checklist item, Civic Platform automatically selects the “Major Violation” check box for the checklist item.
Non-Critical Score	Enter the non-critical score for the status. If a checklist item is not a “Major Violation/Critical Item” in the reference checklist, when users select a status for the checklist item, the non-critical score of the status automatically fills in the score of the checklist item.
Result Type	There are three result types: Approved: Approves (passes) the checklist item. Denied: Denies (fails) the checklist item. Informational: Indicates that the checklist items do not need a status of approved or denied, but the agency wants to collect information in the checklist for that inspection.
Status	Enter the name of the status. What you enter here displays as a choice in the drop-down list of statuses for this checklist item. Users can choose this status from a list of values when completing a checklist. For more information, see “Completing a Checklist” in the <i>Accela Civic Platform User Guide</i> .

Associating a Status Group to a Checklist Item

If you want users to be able to choose from a list of statuses for a checklist item when completing a checklist, you can add a status group and associate it to a checklist item.

Before you begin, you must create a checklist item status group. For instructions, see [Creating a Status Group](#).

To associate a status group with a checklist item

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Checklist**.
Civic Platform displays the Reference Checklist window.
3. Use the **Checklist** drop-down list to choose the checklist that you want.
4. Click **Edit** next to the item you want.
Civic Platform displays the Reference Checklist Item—Edit window.
5. Choose the Status group that you want from the **Status Group** drop down list.
6. Click **Save**.

Editing a Status Group for a Checklist Item

You can edit the values in a status group.

To edit a status group for a checklist item

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Checklist**.
Civic Platform displays the Reference Checklist window.
3. Use the **Checklist** drop-down list to choose the checklist that you want.
4. Click **Edit** next to the item you want.
Civic Platform displays the Reference Checklist Item—Edit window.

Reference Checklist Item - Edit

Use this form to edit Reference Checklist Item

Checklist:	App Guidesheet
Title:	checklist test1 (max 2000 characters)
<input type="button" value="Add"/> <input type="button" value="Edit"/>	
Status Group:	Unlicensed Business
Status Visible:	<input checked="" type="checkbox"/>
Score Visible:	<input checked="" type="checkbox"/>
Comment Visible:	<input checked="" type="checkbox"/>
Max Points Visible:	<input checked="" type="checkbox"/>
Application Spec Info Group Visible:	<input checked="" type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

5. Click **Edit** next to the **Status Group** drop down list.
Civic Platform displays the Checklist Item Status Group—Edit window.

Checklist Item Status Group - Edit
Use this form to set up a Checklist Item Status Group.

Status Group Name:	PASS_FAIL				
Status	Display Order	Result Type *	Critical Score	Non-Critical Score	Major Violation LHS
Pass	1	Approved	10		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Delete
Fail	2	Denied	2		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Delete

Update **Add** **Cancel**

6. Update the fields as described in [Table 181: Checklist Item Status Fields](#).
7. If you want to add a status, click **Add**.
8. If you want to delete a status, click **Delete** next to the value you want to delete, then click **OK**.
9. Click **Update**.
10. Click **Cancel** to return to the Edit window.

Carrying Over Failed Checklist Items

If you enable the failed checklist item carry-over feature for an inspection type, Civic Platform or Citizen Access carries over the failed checklist items from an inspection to the subsequent inspection (or inspections) that users schedule in the same record, until all the failed items are resolved.

To enable the failed checklist item carry-over for an inspection type

1. Go to the Inspection - Edit page, and set the “Capture and carry over failed checklist items” option of the target inspection type to Auto or Auto-All. If you set it to Prompt, the carry-over feature works in Civic Platform and not in Citizen Access. For more information, see [Editing an Inspection Type](#).
2. Go to the Inspection Results Group - Edit page of the result group which is associated with the target inspection type, and set one or more results with the Result Type as Approved or Denied. For more information, see [Adding a Result to an Inspection Result Group](#).
3. Go to the Reference Checklist page, select the checklist which is associated with the target inspection type, and mark the Carry Over Failed Items check box for one or more checklist items in the checklist. For more information, see [Editing a Checklist](#).
4. Open the checklist item status group edit page, and create one or more statuses with the Result Type as Denied. For more information, see [Editing a Status Group for a Checklist Item](#).

Assigning Inspection Categories

You can associate an inspection type with one or more inspection categories. Locate the Inspection Group Code and click the Configuration button, and select Inspection Categories option from the drop-down menu. Following are complete instructions.

To assign an inspection type to one or several inspection categories

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Inspection > Inspection**.
3. Search for the inspection group that you want.
For instructions, see [Searching for an Inspection Group](#).

4. Click the red dot for the **Inspection Group Code** link corresponding to the inspection type you want to modify.
See [Table 176: Inspection Group Fields](#) for complete field descriptions.
Civic Platform displays the Inspection - Edit screen.
5. Click the Configuration button. The Configuration button is at the far right side of the page.
The Configuration drop-down menu displays.
6. Click the **Inspection Categories** option.
Civic Platform displays the Inspection Type - Categories List.
7. Click **Look Up**.
Civic Platform displays the Categories Name and Description fields.
8. Enter the name in the **Category** field and click **Submit**.
Civic Platform displays the Categories Names that match.
9. Select the inspection category to associate with the selected Inspection Type.
- 10. Click **Select**.**
Civic Platform associates the Inspection Type with the Category name.

Configuring Inspection Route Sheets

You can provide inspectors with the ability to create inspection route sheets so they can efficiently plan inspections. This feature helps inspectors minimize the time and distance they travel to complete inspections, which enables them to map their route with maximum efficiency for their business objectives. For example, inspectors can minimize travel distance using the Optimized by Distance option, and can minimize travel time using the Optimized by Time option.

Another example is that inspectors can click the Order By button and select a routing type from the drop-down menu to optimize the inspection route by choice of routing type such as walking, driving, and public transit. Before inspectors can have this feature, you must integrate a third-party route optimizer with Civic Platform. Civic Platform sends requests to this route optimizer and the optimizer returns the optimized route to Civic Platform. Civic Platform then updates the sequence of the inspections in a route sheet accordingly.

To configure inspection route sheet functionality, you must configure the corresponding Function Identifications (FIDs) and Standard Choices. For more information, see “Planning Inspection Route Sheets” in the Land Management chapter of the Civic Platform Configuration Reference.

This section provides you with instructions about integrating a third-party route optimizer. You can integrate a third-party route optimizer with Civic Platform with either of these approaches:

- [JAR Package Integration](#)
- [REST API Integration](#)

JAR Package Integration

To integrate a third party routing optimizer using the JAR Package approach

1. Write a class that implements the following interface:
`com.accela.aa.routeoptimize.RouteOptimizer`

- **Method:**

```
optimizeRoute
```

- **Description:**

```
List<String> optimizeRoute(TravelMode travelMode, Set<String> waypoints,
                           String startPoint, String endPoint) throws RouteOptimizeException
```

- **Parameters:**

travelMode	The parameter specifies the mode of travel for the route. The possible values are Driving, Walking, and Public Transit.
waypoints	The parameter specifies a set of waypoints.
startPoint	The parameter specifies the start location of a route.
endPoint	The parameter specifies the end location of a route.

2. Package your class into a JAR file.

3. Place the JAR file under the Civic Platform system classpath.

4. Configure Standard Choice: ROUTE_OPTIMIZER_PROVIDER.

For more information, see the Standard Choice listing in the Accela Civic Platform Configuration Reference.

REST API Integration

To integrate a third party routing optimizer using the REST API approach

1. Develop a route optimizing REST API.

- **Parameters:**

mode	The parameter specifies the mode of travel for the route. The possible values are driving, walking, and transit.
origin	The parameter specifies the start location of a route.
destination	The parameter specifies the end location of a route.
waypoints	The parameter specifies a set of waypoints, separated by a vertical bar:

- **Response:**

Success Result	The success result contains a set of waypoints in an optimized order, separated by a vertical bar:
Error Message	error: + error messageFor example, error: cannot calculate route.

- **Example:**

Request URL	http://www.bridgeview.gov/restful/route?
	mode=driving&origin=O&destination=H&waypoints=A B C D
Response	Success response: "A C D B" Error response: error: cannot calculate route

2. Configure Standard Choice: ROUTE_OPTIMIZER_PROVIDER.

For more information, see the Standard Choice listing in the Accela Civic Platform Configuration Reference.

Managing Inspection Flows and Milestones

Topics

- [Managing Inspection Flow Processes](#)
- [Managing Inspection Milestones](#)

Managing Inspection Flow Processes

Topics

- [Adding an Inspection Flow Process](#)
- [Reviewing an Inspection Flow Process and Status](#)

Adding an Inspection Flow Process

Each Inspection Group Code defines its own inspection flow process, which lists a series of tasks you must complete before issuing a certain type of permit or license. As necessary, you can set up additional inspection flow processes at any time. You can also add or delete tasks from a process at any time. However, as the inspection administrator, you must be certain to consider the effects when changing the inspection flow process after a specific inspection flow task has started.

To add an inspection flow process

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
 2. Choose Inspection > Inspection.
Civic Platform displays the Inspection - Search screen.
 3. Complete one of these options:
 - Search for an inspection group code and then click **Submit**.
Civic Platform displays the Inspection - Browse screen.
 1. Click **Search** or scroll through the list.
 2. Click the red dot of the inspection group code you want.
Civic Platform displays the Inspection - Edit screen.
 - Create a new inspection group code and then click **Add**. For further details on this task, refer to [Adding an Inspection Type](#).
Civic Platform displays the Inspection Group-Add window.
 1. Enter a name for the Inspection Group Code. The maximum number of characters for a group code name is twelve. This code is not case sensitive. You can use any combination of upper and lowercase characters.
 2. Click **Submit**.
- Refer to [Table 176: Inspection Group Fields](#) for complete field descriptions.
Civic Platform displays the Inspection - Edit screen.

Inspection - Edit
Use this form to set up an Inspection Group.

Inspection Group Code: AutoAssign
Inspection Group Name(Default): AutoAssign
Inspection Group Name : AutoAssign

Configure By: Inspection Flow Inspection Milestone None

Inspection Type(Default)	Inspection Type	Guide Sheet Group	Result Group
Fire inspect	Fire inspect	No group assigned	<input checked="" type="checkbox"/> Electrical

Allow Failed Guidesheet Items: Yes

Capture and carry over failed guide sheet items: None

Reschedule Restriction: No Restriction Hours Prior 1 Days Prior 0 at AM PM

Cancel Restriction: No Restriction Hours Prior 1 Days Prior 0 at AM PM

- Update any of the Inspection - Edit fields, specifying Yes in the Flow Enable drop-down list if the Inspection Type belongs in the inspection flow process.

Refer to [Table 176: Inspection Group Fields](#) for complete field descriptions.

To add inspection types, see [Establishing Inspection Types](#).

- Click **Update**.

- Click **Inspection Flow**.

Civic Platform displays the Inspection Flow Process - Edit screen.

Inspection Flow Process - Edit
Use this form to edit Inspection Flow Process.

Inspection Flow Process View - [Inspection Status View](#) - [Diagram View](#)

Process: AutoAssign

Status *: Enable Disable

Phase #	Next #	Inspection Name	Auto Reschedule	Reschedule (Days)	Next Inspection In Advance(Days)	
 0000000000000000	0000000000000000	Fire inspect	<input type="checkbox"/>	<input checked="" type="checkbox"/> No	0 0	<input type="button" value="Status Configuration"/> <input type="button" value="Delete"/> <input type="button" value="Department"/> <input type="button" value="Staff"/>
 0000000000000000	0000000000000000	Sound inspect	<input type="checkbox"/>	<input checked="" type="checkbox"/> No	0 0	<input type="button" value="Status Configuration"/> <input type="button" value="Delete"/> <input type="button" value="Department"/> <input type="button" value="Staff"/>

- Complete the fields.

Civic Platform supplies the default inspection flow process. Update the fields for each task in the inspection flow process. For a description of fields, see [Table 182: Inspection Flow Process Fields](#).



Note:

Click the yellow light bulb left of the task. Use the Task Flow Assistant to help you set up phase and next numbers.

- Click **Add** to add other inspection types to the inspection flow.

- Click **Update**.

Table 182: Inspection Flow Process Fields

Auto Reschedule	Choose "Yes" if you want to automatically reschedule the inspection when the previous inspection status attains Approved status.
Diagram View	To obtain a visual reference of the inspection flow process, the diagram view link displays a flow diagram of the inspection flow process. See Viewing a Process Diagram
Delete	To remove the Inspection Name from the inspection flow process. Note: If there is only one Inspection Name in the flow process and you delete it, you also delete the entire flow process from Civic Platform.

Department/Staff	Use the Department button to search for the department that is responsible for the task. To search for a specific staff member, complete only the Staff field. Civic Platform automatically populates the Department field with the corresponding department and Staff information.
Inspection Name	Enter the name of the inspection task you want to display for users.
Inspection Status View	Review the hierarchy of the inspection flow process set up for the inspection group code. See Viewing Process Status .
Next #	Enter the 15-digit number that identifies one or more tasks in the workflow process that you want to activate after this task is complete. For more information about each component of a Next number, see Designing Workflows .
Next Inspection In Advance (Days)	The number of days before you can schedule the next inspection in the flow. For example, if you set this field to "8" and you schedule "Initial Building Inspection" for 8 days, meaning its status does not change for 8 days, then you can schedule the next inspection type in the flow.
Phase #	Enter the 15-digit number that identifies the position of this task in the workflow process and its relationship to other tasks. For more information about each component of a Phase number, see Designing Workflows .
Reschedule (Days)	The number of days before you can schedule the inspection after it enters a pending status. For example, if you set this field to 5, and the "Sewer Inspection" status changes to Pending, you cannot reschedule this inspection until 5 days pass.
Staff	Use the Staff button to search for a department and a staff member that is responsible for the task.
Status Configuration	Specify the status that the inspection type must obtain in the flow process. You can also choose to define the next step or the resulting action for the inspection after attains this status.

Reviewing an Inspection Flow Process and Status

Topics

- [Viewing a Process Diagram](#)
- [Viewing Process Status](#)

Viewing a Process Diagram

Viewing an inspection flow process lets you see a visual representation of the process using a flowchart. Seeing a picture of a process can help to better understand how each task relates to other tasks, and can help you catch any errors.

To view a process diagram

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Inspection > Inspection.
Civic Platform displays the Inspection - Search screen.
3. Search for the inspection group code that you want.
 - Click **Submit** to locate all inspection group codes.
 - Enter part of the inspection code and then click **Submit**.

4. Click the red dot that next to the inspection code you want.
5. Click the **Inspection Flow** button.
6. Click the Diagram View link.
Civic Platform displays the flow chart.
7. To restore the size of the window, click **Restore**.
8. When you finish viewing the process, click Cancel or close the view window.

Viewing Process Status

You can view the status of every task in a workflow process. The Process Statuses view, lets you see the relationship between tasks and task statuses, and link to the Inspection Flow Process Status in [Figure 65: Inspection Flow Process Status](#).

Task	Status	Flow Control
B Electrical	Not Ready	On to Next Task
C Building Sewer	Pending	None
III RCCf Drain	Pending	None
IV Rough Grade	Pending	None

Figure 65: Inspection Flow Process Status

- A Process. Current inspection group code of this hierarchy.
- B Task. Inspection type in order of first to last task.
- C Status. Statuses set for the task. Click a status item to change it.
- D Flow Control. The resulting action of the status item. Click a status item to change the flow control.

To view an inspection flow process

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Inspection > Inspection.
Civic Platform displays the Inspection - Search screen.
3. Search for the inspection group code that you want.
 - Click **Submit** to locate all inspection group codes.
 - Enter part of the inspection code and then click **Submit**.

4. Click the red dot that next to the inspection code you want.

5. Click the **Inspection Flow** button.

Civic Platform displays the Inspection Flow Process - Edit screen.

6. Click the Inspection Status View link.

Civic Platform displays the Inspection Flow Process Status - Edit screen.

Inspection Flow Process Status - Edit

Use this form to edit inspection flow process status values.

[Inspection Flow Process View](#) - [Inspection Status View](#) - [Diagram View](#)

Process: Building

Task	Status	Flow Control
Electrical	Fail Not Ready Pass	Go To Next Task
Building Sewer		
Roof Drain		
Rough Grade		
Cancel		

7. Click the plus sign (+) to expand the task.

8. Click a Status item to modify its status.

Civic Platform displays the Inspection Flow Status - Edit screen.

Inspection Flow Status - Edit

Use this form to edit an Inspection Flow Status.

Inspection Code: Plumbing_Ins
 Inspection Type: Initial Plumbing Inspection
 Inspection Status*:

Resulting Action: No Change
 Go To Next Inspection
 Go To Branch Inspection
 Go To Loop Inspection

[Save](#) [Cancel](#)

9. Set the Inspection Status for the task, and modify the Resulting Action (in the flow control column) as needed.

10. Click Save.

Managing Inspection Milestones

After the supervisor updates the inspection milestone values in the application, Civic Platform re-generates the inspection flow data based on the new inspection milestone values. For more information about editing the inspection milestones for an application, see “Editing Inspection Milestones” in the *Accela Civic Platform User Guide*.

To configure Inspection Milestones

**Note:**

You receive a warning message when you update the process configuration type. For example, if you change the existing Inspection Flow to an Inspection Milestone flow, a confirmation displays, "Do you really want to change the selection of "Configure By"? Civic Platform deletes the configured inspection flow and related result status configuration information."

1. Create or edit the inspection milestone flow.

- a. Locate the Inspection Group Code for the inspection group to which you want to add milestones, or add a new Inspection Group.

For information about searching for, editing, or adding an inspection group, see [Managing Inspection Groups](#).

Civic Platform displays the Inspection - Edit page.

- b. Select the **Inspection Milestone** option and click **Update**.

- c. Click the **Inspection Flow** button.

Civic Platform displays the Inspection Flow Process - Edit page.

Inspection Flow Process - Edit

Use this form to edit Inspection Flow Process.

[Inspection Flow Process View](#) - [Diagram View](#)

Process: HouseBuild

Status*: Enable Disable

Inspection Name	Milestone
Electrical	10
Rough Grade	20
Storm Drain	20
Erosion Control	30
Misc. Grading	40
Insulation Walls	40
Insulation Ceiling	40
Exterior Lath	50
Final Grading	60
Final Electrical	60
Final Plumbing	60

- d. Enter a Milestone value for each inspection type.

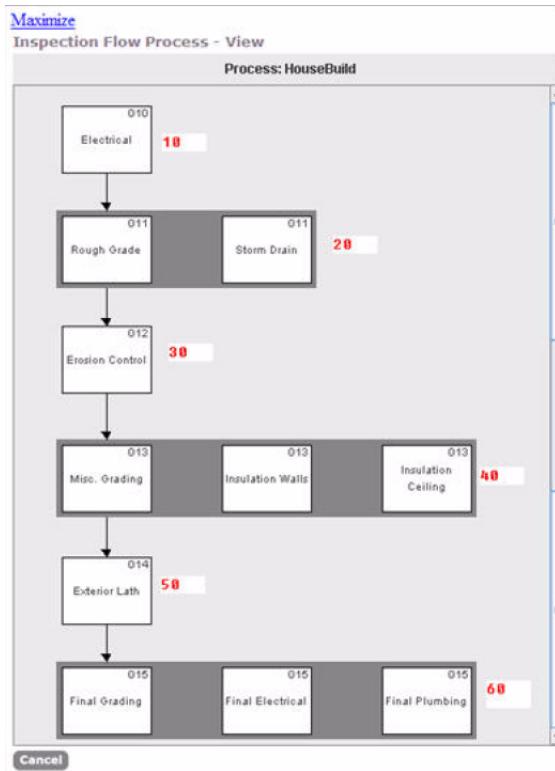
- e. Click **Update**.

**Note:**

Each Milestone listed on this page must have a value. To remove an inspection type, click **Delete**. To add an inspection type, click **Add**.

- f. Click **Diagram View** to view the flow order.

Civic Platform displays the inspection milestone flow.



2. Associate the inspection group code with the desired record type.

For information about adding the inspection group code to the application type, see [Creating and Configuring Records](#).

Right of Way Management

Accela's Right of Way Management (ROWM) solution has been integrated with Civic Platform. The Right of Way Management solution enhances communication between agencies, utility companies, and citizens. Configuring and using Right of Way Management is discussed in this topic.



Note: The implementation of the Right of Way Management solution requires an Accela Delivery Consultant.

Topics:

- [Configuring Right of Way Management in Civic Platform](#)
- [Configuring Right of Way Management Template in Civic Platform](#)
- [Viewing Right of Way Management Records in Civic Platform](#)

Configuring Right of Way Management in Civic Platform

Configure the following Standard Choices to integrate Right of Way Management with Civic Platform. The configuration of all three Standard Choices are required must be active to enable Right of Way Management Civic Platform conflict notification and detection.

- [ROWM_INTEGRATION](#)
- [ROWM_CONDITIONS](#)
- [LOCATION_TYPE](#)

ROWM_INTEGRATION

The Standard Choice ROWM_INTEGRATION is new and available with this release. Configure this Standard Choice to integrate the ROWM API with Civic Platform. After you configure this Standard Choice when you subsequently create a record type with Right of Way Management as the category, a record is created automatically with a link to the Right of Way Management site. This Standard Choice is used by both Civic Platform and Citizen Access.

- **Status** - Select **Enable**
- **Type** - Select **System Switch**

Add the required Standard Choice values.

Standard Choice Value	Value Description
DISTANCE	Numerical distance value
ROWM_API_SYSTEM_NAME	Name of agency system
ROWM_API_URL	Agency URL
UNIT	Unit of measure for distance

ROWM_CONDITIONS

The Standard Choice, ROWM_CONDITIONS is new and available with this release. Configure this Standard Choice to notify the user that a conflict exists on a date and location they applied for a permit or event. This Standard Choice is used by both Civic Platform and Citizen Access.

- **Status** - Select **Enable**

- **Type - Select System Switch**

Add the required Standard Choice values. The Standard Choice Values in the following table are provided as examples and are customizable by your agency.



Note: The mapping values for this Standard Choice element are: The Standard Choice Value = Right of Way Management Event, Activity Type; Value Description = Civic Platform Condition Type.

Standard Choice Value (Right of Way Management)	Value Description (Civic Platform)
Building Permit	Building Permit Notice
Communication	Communication - Event
Music	Music - Event
Roadway	Roadway
Sanitary Sewer	Sanitary Sewer Required
Water	Water - Project

LOCATION_TYPE

The Standard Choice, LOCATION_TYPE is new and available with this release. Configure this Standard Choice to specify a specific location for the event or permit. The Standard Choice Values provided in the following table are exact values and should not be modified. This Standard Choice is used by both Citizen Access and Civic Platform.

- **Status - Select Enable**
- **Type - Select System Switch**

Add the required Standard Choice values.

Standard Choice Value	Value Description
Address	Address
Intersection	Intersection
Street Segment	Street Segment

Configuring Right of Way Management Template in Civic Platform

To implement the Right of Way Management solution, configure the ROWM TEMPLATE. Configure this template to specify the pre-defined event start date and event end date for a specific event. These dates are used in checking for potential event conflicts.



Note: If this template does not exist, you must add it. Once added, ensure that the template is associated to the **Attribute Type of Address** as highlighted in the graphic below.

1. In the Civic Platform Classic UI navigate to **Administrator Tools > Property > APO Template**.
2. In the **Attribute Template Name** field, enter ROWM TEMPLATE and click **Submit**.
3. Click the red dot to the left of ROWM TEMPLATE.
4. Click the red dot to the left of the ROWM TEMPLATE to select it.

Attribute Template

Use this form to edit Attribute Template.

Template Information									Edit Info
Attribute Template Name: ROWM TEMPLATE Attribute Type: ADDRESS Description: ROWM - Event Start Date, Event End Date Status: Enable									
Group: N/A									
Label(Default)	Label	Description	Unit	Data Type	Required Flag	ACA Displayable	Record Searchable	Status	
● Event Start Date	Event Start Date			Date	No	Yes	Yes	Enable	
● Event End Date	Event End Date			Date	No	Yes	Yes	Enable	

[Add](#) [Cancel](#)

5. Click the red dot to the left of **Event Start Date** or **Event End Date** to edit attributes.

Accela Automation: Attribute Template Attribute Add - R0085-E - Intern... — □ X

<https://devint2325.dev.accela.com:4443/i18n/admin/index.cfm>

Attribute Template's Attribute - Edit**Attribute Template Name:** ROWM TEMPLATE**Attribute Type:** ADDRESS**Attribute Name * :** EVENT START DATE**Label:** Event Start Date**Label(Default):** Event Start Date**Description:****Default Value:****Default Value(Default):****Unit:** or**New Unit:** **Data Type:** Date **Display Order:** **Required Flag:** Yes No**ACA Displayable:** Yes No**Record Searchable:** Yes No**Status:** Enable Disable[Submit](#) [Cancel](#)**Mapping Right of Way Record Types between Civic Platform and the Right of Way Management site**

As many Record Types that are needed for an agency in Civic Platform, these Records must have an equivalent Record Type mapping on the Right of Way Management site. This Record type mapping equivalency is performed by an Accela Delivery Consultant.

Viewing Right of Way Management Records in Civic Platform

When you create a Record in either Citizen Access or Civic Platform mapped to a Right of Way Management Record, the Record is created automatically with a link which allows access to the Right of Way Management solution. Users may then view Right of Way Management details by clicking on the link in Civic Platform.

1. Go to the Records portlet in Civic Platform.
2. Look up the Civic Platform Record with the related Right of Way Management Record.
3. Click the **Related Records** detail tab.
4. Click the link under **ROWM Detail**.

The screenshot shows the 'Related Records' detail tab in the Civic Platform. The tab bar includes 'Menu', 'List View', 'Clone Sgl', 'Clone Mult', 'Update Related Records', 'Search', 'Look Up', 'Create a Set', and 'Delete'. Below the tab bar, there is a 'Go To' dropdown and several tabs: 'Related Records' (selected), 'Renewal (0)', 'Renewal Info', 'Status', 'Structures', and 'Structures & Establishments (0)'. Under the 'Related Records' tab, there is a list of items with checkboxes:

- 17BLD-00000-00119; [Building, Building Permit, Residential, New] ;17-2017-4-0361;Accepted;06/26/2017 00:00:00;06/26/2017 12:01:37;208 S Beaver St, Flagstaff, AZ 86001
- Legislative Management: Agenda & Minutes
- ROWM Detail

 A link labeled '17-2017-4-0361 at City Engineer on Building Permit' is shown below the list, with a blue underline indicating it is a hyperlink.

5. Log in to the Right of Way Management site to view Right of Way details for the Record.
- Note:** The staff user will need valid credentials to access the Right of Way Management solution.

The screenshot shows the Accela Right of Way Management application interface. At the top, there is a navigation bar with links for 'Projects', 'Events', 'Permits' (selected), 'Assets', 'Conflicts', 'Documents', 'Tasks', and 'Mailbox'. On the right side of the header, there are links for 'Admin', 'Help', and 'Log Out'. The main content area is titled 'Permit Information' and shows the following details for Permit #17-2017-4-0365:

ID:	17-2017-4-0365	Permit Name:	17BLD-00000-00123
Application Number:		Application Date:	
Description:		Permit Type:	Residential
Permit Issuer:	City Of Flagstaff	Permit SubType:	Residential
Facility Type:		Status:	Submitted for Review
Contact:	City Engineer		
Url:	https://devsite225.accela.com/FLAGSTAFF/Cap/CapDetail.aspx?Module=Default&RecordID=17BLD&accID=8000&accID2=8012&armacyCode=FLAGSTAFF		
Master Permit:			

 Below this, there is a 'Schedule' section with start and end dates, and a 'Location' section specifying the address as 567 S Beaver St, Flagstaff, Arizona, 86001. To the right of the form, there is a map of the area around Northern Arizona University, showing streets like W Beaver Ave, W Benton Ave, E Clay Ave, E Franklin Ave, and E Phoenix Ave. A red dot marks the location of the permit. At the bottom of the map, there is a copyright notice: '©2014 Accela Inc., Data - ©2014 NAVTEQ'.

Part 9: Asset Management

Civic Platform provides functions specific to an asset management solution.

Related Information

[Attributes and Templates](#)

[Asset Types](#)

[Asset Condition Assessments](#)

[Setting Up a Parts Inventory](#)

[Configuring Work Order Templates](#)

[Attaching Assets to Records](#)

Attributes and Templates

Attributes are characteristics of assets, structures, and establishments. When you define attributes in your system, you create fields that can display in records to track information. Attributes enable you to customize your asset, structure, and establishment records.

For instance, if your agency owns complex structures that contain both private residences and commercial establishments, you can define attributes for the apartments such as keyed or code entry, available parking, and elevators. For the commercial establishments, you can define attributes such as type of cuisine, capacity, and number of employees. Some attributes the two types of establishment might share are number of rooms and dimensions.

Define as many attributes as your agency requires. You can use each attribute in multiple templates. You then use templates to create asset, structure, and establishment types, and you use these types to create records. The asset, structure, or establishment records then contain fields that correspond to the attributes included in their templates. As your agency adds new assets and asset types, you might need to create new attributes for your system. You might also need to add attributes to existing asset templates to accommodate the need for more information. To create an asset directly from an Asset Template, see [Creating a Template](#).

Click a topic title below for full details.

Related Information

- [Working with Attributes](#)
- [Working with Templates](#)
- [Working with Attribute Tables](#)
- [Managing Associated Attributes](#)

Working with Attributes

For information on working with asset types, see [Asset Types](#). For information on working with structure and establishment types, see [Structures and Establishments](#).

Topics

- [Creating an Attribute](#)
- [Searching for an Attribute](#)
- [Editing an Attribute](#)
- [Deleting an Attribute](#)
- [Defining Attribute Values](#)

Creating an Attribute

To create an attribute

1. Access the Structures & Establishments Attribute portlet ([Navigating to the Setup Portlet](#)) or the Assets Attribute portlet ([Navigating to the Setup Portlet](#)).
2. Click **New**.
Civic Platform displays the Attribute Detail entry form to create an attribute.

3. Complete the required fields and other fields as described in [Table 183: Attribute Fields](#).



Note:

If you select **Yes** from the **Is Dropdown List** field, you must define the attribute values for the item. You define attribute values after clicking **Submit** for the attribute. The attribute values you define display in a drop-down list when the user creates an asset, structure, or establishment with this attribute type. For more information about defining attribute values, see [Defining Attribute Values](#).

4. Click **Submit**.

Civic Platform adds the attribute details.

Table 183: Attribute Fields

Attribute Group	Use this field to organize the attributes. Choose a group for the attribute from the drop-down list.
Attribute Label	<p>Enter the label of the attribute the user sees when adding or editing an asset, structure, or establishment.</p> <p>The label is what the user sees on the Asset, Structure, or Establishment Detail form. This identifier need not be unique for all attributes. For example, you can have an attribute called “District” for an asset, but different assets have different districts. You can create multiple district attributes, for example DistrictWater and DistrictPark, but give them all the same label.</p>
Attribute Length	Enter the number of characters the attribute field allows.
Attribute Name	The attribute name is a unique name for the attribute. This name is only for administrative organization, it does not display to users.
Default Value	Set a default value for the attribute. When a user creates an asset, structure, or establishment that includes this value or attribute, the field has this default value, making the user experience more efficient. To apply a date, click the date picker.
Description	Enter a description for the attribute.
Display Color	This field is currently active.
Is Dropdown List	Select Yes if you want the attribute to have a drop-down list providing specific values for the user. These values display to the user when they create an asset with this attribute.
Searchable Flag	Set an attribute searchable flag to “Yes” to display the field when a user begins a search for an asset, structure, or establishment. When searching, the search form displays the appropriate attributes when the user selects a Group and a Type.
Unit Type	Use the drop-down list to identify the unit type for the attribute such as dollars, feet, hours, miles, and yards.
Use Shared Drop-down Lists	<p>Select this option to associate shared drop-down lists with an asset attribute. When you select this option, a search field enables you to search for existing shared drop-down lists. If you search for a shared drop-down list that does not match any existing shared drop-down lists, then the Shared Drop-down List Search page opens. Use this page to search for existing shared drop-down lists. If you search for a shared drop-down list that matches one existing shared drop-down list, then the existing shared drop-down list displays on the Attribute form.</p> <p>If you search for a shared drop-down list that matches multiple existing shared drop-down lists, then the Shared Drop-down List Select page opens and you can select the desired drop-down list.</p>

Value Data Type	Use the drop-down list to identify the data value for the attribute such as text, date, Y/N, number, drop-down list, text, and time.
	This selection controls the behavior of the field validation on the form. For example, if you select "date" the field displays the calendar button next to the field and only accept valid dates.
Value Required Flag	Use the drop-down list to identify whether or not the attribute is mandatory upon entry.

Searching for an Attribute

Your agency can have thousands of attributes for the different assets, structures, and establishments your agency manages. Before you can modify or review details about an asset, you must find it.

To search for an attribute

1. Access the Structures & Establishments Attribute portlet ([Navigating to the Setup Portlet](#)) or the Assets Attribute portlet ([Navigating to the Setup Portlet](#)).

2. Click **Search**.

Civic Platform displays the Attribute Search page.

3. Enter any search criteria in the fields. For a description of the fields, see [Table 183: Attribute Fields](#).

4. Click **Submit**.

Civic Platform displays the attributes that match your search criteria.

5. Click the link of the attribute you want to work with.

Civic Platform displays the details of the selected attribute.

Editing an Attribute

You can edit existing attributes. You might need to change the size of the attribute's field to accommodate longer words, or change other elements of an attribute. For example, you might have an attribute for your agency's vehicles that records whether they have diesel engines or gasoline engines. As technology advances, you can modify that attribute to include a classification for a hybrid electric engine.

To edit an attribute

1. Access the Structures & Establishments Attribute portlet ([Navigating to the Setup Portlet](#)) or the Assets Attribute portlet ([Navigating to the Setup Portlet](#)).

2. Click the **Attribute Name** link for the attribute you want to edit.

Civic Platform displays the Attribute Detail portlet.

3. Make changes to any fields that display in the Attribute Detail secondary tab.

4. Click **Submit to save changes.**

Civic Platform saves the modifications for that attribute.

Deleting an Attribute

If you no longer need a particular attribute, you can delete it. If you include the attribute in a template, you cannot delete it. Before you attempt to delete an attribute from your system, delete it from any templates. To delete attributes from a template, see [Deleting an Attribute Table from a Template](#).

To delete an attribute

- 1. Access the Structures & Establishments Attribute portlet ([Navigating to the Setup Portlet](#)) or the Assets Attribute portlet ([Navigating to the Setup Portlet](#)).**
 - 2. Select each attribute you want to delete.**
 - 3. Click **Delete**.**
- Civic Platform removes the attribute.

Defining Attribute Values

Standardize attribute value options by defining a set of possible values in a drop-down list. If you create the attribute Asset Inspection Category, you can provide the three category options of red, green, and yellow to indicate that an asset is in good condition (green), in need of repairs (yellow), or in need of replacement (red).

Use the attribute value secondary tab when you want to create new attribute values, view details of an attribute value, or delete attribute values that are unnecessary.

Topics

- [Creating an Attribute Table](#)
- [Deleting an Attribute Table](#)
- [Editing the Weighting Factor of an Attribute Value](#)

Creating an Attribute Value

You might need to create attribute values to populate a drop-down list. For example, if you are creating an attribute for inspection categories, you can create three categories of red, green, and yellow to indicate that an asset is in good condition, in need of repairs, or in need of replacement.

To create an attribute value

- 1. Find or create an attribute. For instructions see either [Searching for an Attribute](#) or [Creating an Attribute](#).**
 - 2. Click the **Attribute Value** secondary tab.**
- Civic Platform displays a list of existing attribute values for the attribute.
- 3. Click **New**.**
- Civic Platform displays the create Attribute Value form portlet.
- 4. Enter the **Attribute Value**. Attribute Value is the value that displays to the user from a drop-down list.**
 - 5. Specify a value for the **Weighting Factor**. See [Editing the Weighting Factor of an Attribute Value](#).**

An attribute value is a value that administrators assign to an attribute. You can give each attribute value a weighting factor that indicates the priority or importance of the attribute value. A larger number gives

a higher priority, a smaller number is a lower priority. Users identify attribute values in the drop-down list associated with an attribute field during creation or editing.

6. Click **Submit**.

Civic Platform adds the value to the attribute value list portlet.

7. Repeat through to add attribute values until the list of attribute values is complete.

Deleting an Attribute Value

If you no longer need a particular attribute value, you can delete it. For example, if you made a mistake when creating an attribute value, you can delete the attribute value. Attributes you delete become historical data.

To delete an attribute value

- Find the attribute name whose values you need to delete or modify. For instructions, see [Searching for an Attribute](#).

If the Attribute Detail form portlet has Yes as the option in the **Is Dropdown List** field then the **Attribute Value** tab activates.

- Click the **Attribute Value** tab.

Civic Platform displays a list of existing attribute values for the attribute.

- Select each attribute value you want to delete.

- Click **Delete**.

Civic Platform removes the attribute value.

Editing the Weighting Factor of an Attribute Value

An attribute value is a value that administrators assign to an attribute. You can give each attribute value a weighting factor that indicates the priority or importance of the attribute value. A larger number gives a higher priority, and a smaller number is a lower priority. Users identify attribute values in the drop-down list associated with an attribute field during asset, structure, or establishment creation or editing.

Civic Platform uses weighting factors as part of a rating formula to calculate the condition of an asset. This helps to determine which assets need maintenance first, and which can wait. You can update the weighting factor to change the priority of a specific attribute value. Users do not interact with the weighting factor or the rating formula. For information on asset ratings, see [Asset Condition Assessments](#).

For example, an inspector inspects a section of sewer line (asset) and discovers a leak (attribute). For this agency, the leak sizes are 1/32", 1/16", 1/8", 1/4", and None (attribute values). See [Table 184: Example Leak Sizes and Weighting Factors](#). After the inspection, the inspector reports the size of the leak. Each leak size has a different weighting factor, beginning at 1 for None and ranging to 5 for 1/4". The larger the leak, the higher the priority. If the inspector lists the leak as 1/4", it receives attention before a leak listed as 1/32" or None.

Table 184: Example Leak Sizes and Weighting Factors

Leak Size	Weighting Factor
None	1
1/32"	2
1/16"	3
1/8"	4
1/4"	5

The weighting factor is part of a rating formula that you use to prioritize which assets to take care of first or need the most work. For more information about rating formulas, see [Asset Condition Assessments](#). Users do not interact with the weighting factor or the rating formula. Users can only view the attributes values in the drop-down list. For example, an inspector views the size of the leak when viewing an asset.

To edit the weighting factor of an attribute value

- Access the Structures & Establishments Attribute portlet ([Navigating to the Setup Portlet](#)) or the Assets Attribute portlet ([Navigating to the Setup Portlet](#)).
- Click the **Attribute Name** link you want to update.
For details on how to find an attribute, see [Searching for an Attribute](#).
- Click the **Attribute Value** tab. If you set the **Is Dropdown List** to **Yes** then the Attribute Value tab activates. Each attribute value you define here is available for users to choose from a drop-down list.
Civic Platform displays the Attribute Value list portlet.

Attribute Name	Attribute Value	Weighting Factor	Updated Date	Updated By	Record Status
Direction...	Clockwise		05/22/2008	MBRADLEY	Active
Direction...	Counter C...		05/22/2008	MBRADLEY	Active

- Click the link for the attribute value you want to view.
Civic Platform displays the Attribute Value detail portlet.

Attribute Name	DirectionToOpen	Attribute Value	Clockwise	Weighting Factor	<input type="text"/>
----------------	-----------------	-----------------	-----------	------------------	----------------------

- Update the **Weighting Factor** field.
- Click **Submit**.

Civic Platform updates the Attribute Value list portlet.

Attribute Name	Attribute Value	Weighting Factor	Updated Date	Updated By	Record Status
Direction...	Clockwise	20	03/17/2013	ADMIN	Active
Direction...	Counter C...		05/22/2008	MBRADLEY	Active

Working with Templates

For information on working with asset types, see [Asset Types](#). For information on working with structure and establishment types, see [Structures and Establishments](#).

Topics

- [Creating a Template](#)

- [Searching for a Template](#)
- [Editing a Template](#)
- [Deleting a Template](#)
- [Managing Template Attributes](#)
- [Managing Template Attribute Tables](#)

Creating a Template

A template is a collection of selected attributes associated with a specific class of asset, structure, or establishment. A template might also include a collection of selected attribute tables associated with a specific asset class. You can attach templates to asset, structure, and establishment types, and the records created from those types display the attribute fields contained in the template.

For example a vehicle template can have tire size, tread depth, tire pressure, engine size, and transmission type as attributes. These fields display in any asset record created from an asset type based on this template. For more information about creating an asset type see [Asset Types](#). For information on working with structure and establishment types, see [Structures and Establishments](#).

To create a template

1. Access the Structures & Establishments Template portlet ([Navigating to the Setup Portlet](#)) or the Assets Attribute Template portlet ([Navigating to the Setup Portlet](#)).
2. Click **New**.

Civic Platform displays the Create New Template portlet.

The screenshot shows the 'Attribute Template' portlet interface. At the top, there's a toolbar with buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. Below the toolbar, there are three tabs: 'Attribute Template' (which is selected), 'Attributes', and 'Attribute Tables'. On the left, there's a field labeled 'Template ID *' with a placeholder value '1'. On the right, there's a larger text area labeled 'Template Description' with a 'check spelling' link at the bottom right. The overall layout is clean and organized, typical of a Civic Platform application.

3. Complete the following fields:

Template ID	Enter the number used to identify the template.
Template Description	Enter the description to identify the template.

4. Click **Submit**.

Civic Platform updates the Template detail portlet.

5. Click the **Attributes** tab.

Civic Platform displays the Attribute Template list portlet.

Attribute Group	Attribute Name	Attribute Label	Description	Attribute Length	Default Value	Is Dropdown List	Value Data Type	Unit Type
Structural	SM_Cathodic...	Cathodic ...	10		No	Date		
Structural	SM_Corrosive	Corrosive	10		No	Y/N		
Structural	SM_Diameter	Diameter	10		No	Number		
Structural	SM_Lining...	Lining Date	10		No	Date		
Structural	SM_Material	Material	10		Yes	Text		

6. Add attributes to the template.

To add existing attributes, complete these steps:

a. Click **Look Up**.

Civic Platform displays the Attribute Template search page.

b. Complete any fields that display. For a description of the fields, see [Attribute Fields](#).

c. Click **Submit**.

Civic Platform returns a list of attributes that match your search criteria.

d. Select any attribute(s) you want to add to the template.

e. Click **Select**.

Civic Platform adds the attribute(s) to the template.

7. To create new attributes for the template, see [Creating an Attribute](#) or complete these steps:

a. Click **New**.

Civic Platform displays the Create New Attribute page.

b. Complete these fields:

Attribute Label Enter the label of the attribute the user sees when adding or editing an asset, structure, or establishment.

Attribute Name Enter a unique attribute name, such as Commercial Establishment Capacity. This name only displays for administrators.

Value Data Type Use the drop-down list to identify the data value for the attribute such as text, date, Y/N, number, drop-down list, text, and time.

c. Complete any other fields that display. For a description of the fields, see [Attribute Fields](#).

d. Click **Submit**.

Civic Platform creates the attribute and adds it to the template.

8. Add attribute tables to the template.

a. Click **Look Up**.

Civic Platform displays the Attribute Table search page.

b. Complete these fields:

Attribute Table Name Enter the name of the attribute table you want to find.

Description	Enter a description of the attribute table you want to find.
Record Status	Select the status of the attribute table you want to find.

c. Click **Submit**.

Civic Platform displays a list of attribute tables that match your search criteria.

d. Select the attribute table(s) you want to add to the template.

e. Click **Select**.

Civic Platform adds the attribute table(s) to the template, then displays a confirmation message.

Searching for a Template

Use the following procedure to search for a template. If you do not know the full name of the template, you can perform a partial search by typing in part of the template name. For example, to find the backflow east valve template, type backflow in to the Template ID field. Civic Platform returns all template IDs that have "backflow" as part of the Template ID.

To search for a template

1. Access the Structures & Establishments Template portlet ([Navigating to the Setup Portlet](#)) or the Assets Attribute Template portlet ([Navigating to the Setup Portlet](#)).
2. Click **Search**.
Civic Platform displays the Template search portlet.
3. Enter any search criteria in the fields.
4. Click **Submit**.
Civic Platform returns a list of templates that match the search criteria.

Editing a Template

After you create a template, you might need to update the template. For example, an agency adds lift loaders to the bed of all trucks in the fleet. The assets need to indicate which vehicles have loaders. You must add a loader attribute to the template so the attribute can display in the asset portlet for the user.

To edit a template

1. Access the Structures & Establishments Template portlet ([Navigating to the Setup Portlet](#)) or the Assets Attribute Template portlet ([Navigating to the Setup Portlet](#)).
2. Click the **Template ID** link for the asset template you want to update.
Civic Platform displays the Template detail portlet.
3. Do any of the following:
 - On the Attribute Template tab, update the template description as necessary.
 - On the Attributes tab, manage template attributes as explained in [Managing Template Attributes](#).
 - On the Attribute Tables tab, manage template attribute tables as explained in [Managing Template Attributes](#).

Deleting a Template

You can only delete templates that are not the basis for an asset, structure, or establishment type. For information about creating a template, see [Creating a Template](#).

To delete a template

1. Access the Structures & Establishments Template portlet ([Navigating to the Setup Portlet](#)) or the Assets Attribute Template portlet ([Navigating to the Setup Portlet](#)).
 2. Select the **Template ID** for each template you want to delete.
 3. Click **Delete**.
- Civic Platform deletes the templates and updates the Asset Template list portlet.

Managing Template Attributes

Topics

- [Creating Template Attributes](#)
- [Copying Template Attributes](#)
- [Editing the Display Order of Template Attributes](#)

Creating Template Attributes

To create template attributes

1. Access the Structures & Establishments Template portlet ([Navigating to the Setup Portlet](#)) or the Assets Attribute Template portlet ([Navigating to the Setup Portlet](#)).
2. Click the **Template ID** link for the asset template you want to update.
Civic Platform displays the Template detail portlet.
3. Click the **Attributes** tab.
Civic Platform displays the Template Attribute list portlet.
4. Click **New** to add template attribute information to this template.
Civic Platform displays the Attribute Detail form portlet for the template.
5. Complete the fields you need to define the new template attribute.
6. Click **Submit**.
Civic Platform updates the Template detail portlet.

Copying Template Attributes

You do not need to create new attributes for every template. When you create an attribute for another template, you can copy that attribute to any template you create.

To search and copy a template attribute

1. Find the template from which you want to delete an attribute. For instructions, see or [Creating a Template](#).
2. Click the **Template Attribute** tab.
Civic Platform displays a list of existing attributes for the selected template.
3. Click **Look Up**.
Civic Platform displays the Template Attribute Search form.
4. Enter any search criteria in the fields.

5. Click **Submit.**

Civic Platform displays the attributes that match your search criteria.

6. Select each attribute you want to copy to the current template

7. Click **Submit.**

Civic Platform copies the selected attributes to the current template.

Editing Template Attributes

When you edit an attribute for a particular asset template, be aware that the attribute can have other templates. Any changes you make to the attribute affect all templates that the attribute resides on. Be careful that your changes do not negatively affect other templates.

To edit a template attribute

- Find the template from which you want to delete an attribute. For instructions, see [Searching for a Template](#).

- Click the **Template Attribute** tab.

Civic Platform displays a list of existing attributes for the selected template.

- Click the link for the attribute you want to modify.

Civic Platform displays the attribute details.

- Edit the necessary fields.

- Click **Submit**.

Deleting an Attribute from a Template

If you want to remove an attribute from a template, you can delete it. However, Civic Platform removes all relevant data stored in the database for asset, structure, and establishment types created using this template when you delete an attribute.

To delete a template attribute

- Find the template from which you want to delete an attribute. For instructions, see [Searching for a Template](#).

- Click the **Attributes** tab.

Civic Platform displays a list of existing attributes for the selected template.

- Select each attribute that you want to remove from the template.

- Click **Delete**.

Civic Platform displays a dialogue box informing you that deleting the attribute removes all relevant data stored in the database for asset types using this template and asks you to confirm if you want to delete the attribute.

- Click **OK** to continue or **Cancel**.

If you Click **OK**, Civic Platform removes the selected attributes from the asset template. If you click **Cancel**, Civic Platform returns to the Attributes list portlet.

Editing the Display Order of Template Attributes

Because you can use template attributes for multiple templates, you might need to order them differently for each template. For example, suppose that you have an attribute called diameter that you use to record

the diameter of pipes, couplings, and drains. You can change the diameter attribute listed fourth for pipes, seventh for couplings, and twelfth for drains.

In such a case, the display order field in the attributes detail are not sufficient to define the display order for all three templates. You can override an attribute's display order on each template.

To edit the display order of template attributes

1. Find an existing asset template or create a new one. For instructions, see [Searching for a Template](#) or [Creating a Template](#).
2. Click the **Attributes** tab.
Civic Platform displays a list of existing attributes for the selected template.
3. Locate the attribute for which you want to change the order. Scroll to the right until you find the **Display Order** link.
4. Click the **Display Order** link.
Civic Platform displays the attribute display order form.
5. Enter the number of the order for the attribute in this particular template.
6. Click **Submit**.
Civic Platform overrides the attribute display order for the chosen template.

Managing Template Attribute Tables

Topics

- [Associating an Attribute Table with a Template](#)
- [Deleting an Attribute Table from a Template](#)

Associating an Attribute Table with a Template

After you create an attribute table, you can associate it with a template. This way, you can associate multiple attributes with a template simultaneously.

For example, you might associate an attribute table named Pavement Inspection with a template named Street Segment. When you associate the Pavement Inspection attribute table with the Street Segment template, you also associate all the table attributes with the template. This includes the inspection date, pavement rating, and inspection comment attributes.

You can associate each attribute table with multiple templates. Use templates to create asset, structure, and establishment record types. When an agency user creates a new record, attributes display as fields in the record form.

To associate an attribute table with a template

1. Find the template from which you want to delete an attribute table. For instructions, see [Searching for a Template](#).
2. Click the **Attribute Tables** tab.
Civic Platform displays a list of existing attribute tables for the selected template.
3. Click **Look Up**.
Civic Platform displays the Attribute Table Lookup page.
4. Complete these fields:

Attribute Table Name	Enter the name of the attribute table you want to find.
----------------------	---

Description	Enter the description of the attribute table you want to find.
Record Status	Enter the status of the attribute table you want to find.

5. Click **Submit.**

Civic Platform displays the attribute tables that match your search criteria.

6. Select the attribute table(s) you want to associate with the template.

7. Click **Select.**

Civic Platform associates the selected table(s) with the template and displays a confirmation message.

Deleting an Attribute Table from a Template

You can remove the association between an attribute table and a template. When you delete an attribute table from a template, you also delete all relevant data stored in the database for asset types created using the associated template.

To delete an attribute table from a template

1. Find the template from which you want to delete an attribute table. For instructions, see or [Creating a Template](#).

2. Click the **Attribute Tables tab.**

Civic Platform displays a list of existing attribute tables for the selected template.

3. Select each attribute table that you want to remove from the template.

4. Click **Delete.**

Civic Platform displays a dialogue box informing you that deleting the attribute table removes all relevant data stored in the database for asset types using this template and asks you to confirm if you want to delete the attribute.

5. Click **OKto continue or **Cancel**.**

If you Click **OK**, Civic Platform removes the selected attribute tables from the asset template. If you click **Cancel**, Civic Platform returns to the Attribute Tables list portlet.

Working with Attribute Tables

For more information on how to manage attributes collected in an attribute table, see [Managing Associated Attributes](#).

For more information on working with templates see [Working with Templates](#).

Topics

- [Creating an Attribute Table](#)
- [Searching for an Attribute Table](#)
- [Editing an Attribute Table](#)
- [Deleting an Attribute Table](#)

Creating an Attribute Table

Before you create an attribute table, decide which common attributes you want to collect in the table. When you create an attribute table, you can associate existing attributes with the table or create new attributes.

When you create an attribute table, you identify the table name and provide a table description.

For more information on how to collect attributes in an attribute table, see [Managing Associated Attributes](#).

To create an attribute table

1. Access the Assets Attribute Table portlet ([Navigating to the Setup Portlet](#)).

2. Click **New**.

Civic Platform displays the New Attribute Table page.

3. Complete these fields:

Attribute Table Name	Enter a unique name to identify the attribute table, such as Pavement Inspection or Street Light.
----------------------	---

Description	Enter a description of the attribute table.
-------------	---

4. Click **Submit**.

Civic Platform creates the attribute table and then displays a confirmation message.

Searching for an Attribute Table

You can search for and edit attribute tables as required.

To search for an attribute table

1. Access the Assets Attribute Table portlet ([Navigating to the Setup Portlet](#)).

2. Click **Search**.

Civic Platform displays the Attribute Table search page.

3. Complete these fields:

Attribute Table Name	Enter the name of the attribute table you want to find.
----------------------	---

Description	Enter a description of the attribute table you want to find.
-------------	--

Record Status	Select the status of the attribute table you want to find.
---------------	--

4. Click **Submit**.

Civic Platform displays the attribute tables that match your search criteria.

5. Click the attribute table link you want to work with in the Attribute Table Name column.

Civic Platform displays the attribute table details.

Editing an Attribute Table

You can edit an attribute table description as required.

To edit an attribute table

1. Access the Assets Attribute Table portlet ([Navigating to the Setup Portlet](#)).
2. Find the attribute table you want to edit. For instructions on how to find an attribute table, see [Searching for an Attribute Table](#).
3. Click the attribute table link in the Attribute Table Name column.
Civic Platform displays the attribute table details.
4. Edit the attribute table description as required.
5. Click **Submit**.
Civic Platform saves the changes to the attribute table and then displays a confirmation message.

Deleting an Attribute Table

To delete an attribute table, you must first delete any associations between the attribute table and a template. For instructions on how to delete an attribute table from a template, see [Deleting an Attribute Table from a Template](#).

When you delete an attribute table, Civic Platform changes the table's record status to Inactive.

To delete an attribute table

1. Access the Assets Attribute Table portlet ([Navigating to the Setup Portlet](#)).
2. Find the attribute table you want to edit. For instructions on how to find an attribute table, see [Searching for an Attribute Table](#).
3. Select the attribute table you want to delete.
4. Click **Delete**.
Civic Platform deletes the selected attribute table and then displays a confirmation message.

Managing Associated Attributes

Attributes are characteristics of assets, structures, and establishments. When you create an attribute table, you collect common attributes in one form.

You can associate existing attributes with an attribute table or create new attributes. When you create a new attribute, you automatically add the attribute data to the Civic Platform database.

Topics

- [Associating an Attribute with an Attribute Table](#)
- [Deleting the Association Between an Attribute and an Attribute Table](#)

Associating an Attribute with an Attribute Table

Populate an attribute table by associating attributes with the table. For example, you might have an attribute table named Street Light. You could populate the table with street light attributes, such as bulb type.

To associate an attribute with an attribute table

1. Access the Assets Attribute Table portlet ([Navigating to the Setup Portlet](#)).

2. Find the attribute table you want to associate attributes with. For instructions on how to find an attribute table, see [Searching for an Attribute Table](#).
3. Click the attribute table link in the Attribute Table Name column.
Civic Platform displays the attribute table details.
4. Click the **Attributes** tab.
Civic Platform displays a list of attributes associated with the selected table.



The screenshot shows a web-based application interface for managing attribute tables. At the top, there's a header bar with tabs for "Attribute Table Name: MyAttributeTable", "Menu", "New", "Look Up", "Delete", and "Help". Below the header, there are two tabs: "Attribute Table" (which is selected) and "Attributes (1)". A table below lists one attribute entry:

Attribute Group	Attribute Name	Attribute Label	Description	Attribute Length	Default Value	Is Dropdown List	Value Data Type	Unit Type	Value Required Flag
Location	Table	Attribute		10		No	Number		No

5. Complete one of these steps:
 - To add existing attributes to the table
 1. Click **Look Up**.
Civic Platform displays the Attribute search portlet.
 2. Complete the fields that display. For a complete list of fields, see [Table 183: Attribute Fields](#).
 3. Click **Submit**.
Civic Platform displays a list of attributes that match your search criteria.
 4. Select the attribute(s) you want to add to the table.
 5. Click **Select**.
Civic Platform associates the attributes with the table.
 - To create a new attribute for the table
 1. Click **New**.
Civic Platform displays the Create New Attribute page.
 2. Complete the fields that display. For a complete list of fields, see [Table 183: Attribute Fields](#).
 3. Click **Submit**.
Civic Platform creates the attribute and associates it with the attribute table.

Deleting the Association Between an Attribute and an Attribute Table

You can delete an attribute from an attribute table. When you delete an attribute from a table, you also delete the link between the attribute table and any associated templates.

You can recreate the association between an attribute table and a template as required. For instructions on how to associate an attribute table with a template, see [Creating a Template](#).

To delete the association between an attribute and an attribute table

1. Access the Assets Attribute Table portlet ([Navigating to the Setup Portlet](#)).
2. Find the attribute table you want to remove attributes from. For instructions on how to find an attribute table, see [Searching for an Attribute Table](#).
3. Click the attribute table link in the Attribute Table Name column.

Civic Platform displays the attribute table details.

4. Click the **Attributes** tab.

Civic Platform displays a list of attributes associated with the selected table.

5. Select the attribute(s) that you want to remove from the attribute table.

6. Click **Delete**.

Civic Platform displays a message informing you that deleting the attribute removes all relevant data for templates that use this table and asks you to confirm if you want to delete the attribute.

7. Click **OK** to continue or **Cancel**.

If you Click **OK**, Civic Platform removes the selected attributes from the attribute table. If you click **Cancel**, Civic Platform returns to the Attributes list portlet.

Asset Types

Asset types are categories used to group assets together. Each asset type has a set of standard attributes that provide basic information about the asset type. When you create an asset type in the administration portlet, it displays in the asset type drop-down list in other areas of Civic Platform.

Click a topic title below for full details.

Related Information

[Creating an Asset Type](#)

[Assigning an Asset ID Mask](#)

[Searching for Asset Types](#)

[Editing an Asset Type](#)

[Deleting an Asset Type](#)

[Requiring the Asset Size Field](#)

[Associating an Asset Type with Work Order Types](#)

[Synchronizing Assets with GIS](#)

[Viewing Rating Types under Asset Type](#)

[Creating Usage Types](#)

[Working with Asset Class Types](#)

Creating an Asset Type

Create a new asset type each time an agency gets a new type of asset. For example, your agency adds gas flow meters to the natural gas lines to track the amount of gas consumed each month. Add flow meters as an asset type. The agency can now track and maintain the flow meters by associating work orders to it. You can also maintain the assets in the legacy Accela GIS.

You can create the asset usage Unit Types and associate one or more to each asset type, which enables administrators to specify the unit types that are applicable to specific asset types. Daily agency users can then associate the appropriate unit type to the asset type in Asset management and Preventative Maintenance Schedule portlets. Refer to the overview and steps in [Creating Usage Types](#).

You can specify the type of work orders associated with Asset Types.

After you create a new asset, a tab called **Node Types** activates for those assets that belong to the **Node-Link Linear** class type only. For more information about node types, see [Associating Node Types with Assets](#).

The screenshot shows a web-based application interface for managing assets. At the top, there's a navigation bar with buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. Below this is a tab bar with 'Asset Detail' selected, along with other tabs like 'Address', 'Work Order', 'Linked Assets', 'Documents', 'PM Schedules', 'Cost Rates', 'Condition', and 'Condition'. The main area contains several input fields and dropdown menus. On the left, there's a group for 'Asset Group' (set to 'Water') and 'Status' (set to '--Select--'). In the center, there's a 'Asset Type' dropdown menu open, showing options like '--Select--', 'Fire Hydrant', and 'Check spelling'. To the right, there are fields for 'Class Type', 'Asset Name', 'Comments', 'Start Value', 'Salvage Value', 'Depreciation Start Date' (set to '03/17/2013'), 'Depreciation End Date', 'Depreciation Value', and 'Depreciation Amount'. There's also a 'Parent Asset ID' field. A 'check spelling' link is visible near the bottom left.

Figure 66: Asset Detail with Asset Type Drop-down List

Assigning an Asset ID Mask

The asset identification mask is the default prefix for an asset type. Enter an asset ID mask if your agency uses customized abbreviations or number schemes for assets. Civic Platform adds this code as a prefix to any new assets of this asset type.

An ID mask defines the format of the asset number. ID masks support 2-digit and 4-digit year, or any length of sequence number. An asset ID mask can contain strings that show part of the asset number that Civic Platform recognizes and acts on before showing the asset ID to users. The basic keys that Civic Platform recognizes and defines are in [Table 185: Asset ID Mask Keys](#). The delimiter to separate the keys from the text is the '\$' sign. Enclose all of the keys in a pair of '\$' signs. For example, to make it easy to identify a ball field the asset ID mask might start with BLF, which indicates ball fields. Examples of asset ID mask numbering schemes and their output are in [Table 186: Asset ID Mask Examples](#).

Table 185: Asset ID Mask Keys

Key	Description	Example
YY	Two digit year	07 for 2007
YYYY	Four digit year	2007
DD	Two digit day	20 for 4/20/07
MM	Two digit month	06 for June
MMM	Three character month	APR for April

Key	Description	Example
TSEQAzz	Generates a sequence number. This key must be after a hyphen or at the end of the ID Mask so the sequence number is at the end of the asset ID. The sequence number depends on the values of T and zz. T specifies the level where you set the sequence. For example, generate sequence number at the Type level. A specifies that the sequence number resets annually, as the year changes. zz specifies the size of the sequence number generated, which should not be greater than 09. The sequence number generated plus the rest of the asset ID must not exceed thirty characters.	<p>TSEQ03 generates a 3 digit sequence number. Many asset ID masks include a brief description before the sequence number such as BLD for the buildings asset types or BLF for baseball fields</p> <p>Assets with the same group type share sequence numbers. For example, a hydrant and manhole are both nodes, which share the same sequence number such as 131.</p> <p>Assets with the same asset type have different sequence numbers. For example, a water line and a sewer line are different asset types. The sewer line might have 012 as a sequence number and the water line might have 023 as a sequence number. For example: \$YY\$-\$TSEQA05\$,\$MM\$-\$TSEQA02\$, but it does not support "\$YY\$-\$GSEQA04\$"</p>

Table 186: Asset ID Mask Examples

Mask	Output
Anything \$YY\$-\$DD\$-\$MM\$-\$MM\$-anything-\$GSEQ04\$-anything	Anything -07-20-04-APR-anything-013- anything
B\$YY\$-\$GSEQ03\$	B07-123
BP\$YY\$-\$GSEQ03\$	BP07-234
EP-\$GSEQ04\$	EP-2237
X\$YY\$-\$GSEQ05\$	X07-71984
\$YY\$BLD-00000-\$TSEQ03\$	07BLD-00000-121

When you clone an asset ID, Civic Platform uses the Asset ID Mask if you leave the Asset ID prefix blank. For example, you have set the Asset ID Mask for a hydrant to \$YY\$SW-\$TSEQ03\$. When a user clones a hydrant asset, they have the choice of entering a custom asset ID prefix or leaving the field blank. If the user leaves the asset ID prefix blank, all of the new clones start with generated Asset ID Mask. For example, if you clone a hydrant in March 2008 the generated ID mask is 08SW-151.

Searching for Asset Types

Use the following procedure to search for an asset type. If you do not have the full name of the asset type, you can use partial text. For example, to find a water line asset type, enter "water" into the Asset Type field. The search returns all asset types that start with "water."

To search for an asset type

1. Access the Asset Type Administration portlet ([Accessing the Asset Type Administration Portlet](#)).
 2. Click **Search**.
- Accela Civic Platform - Asset displays the Asset Type Search detail portlet.

The screenshot shows the 'Asset Type' administration interface. At the top, there are buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. Below these are several input fields and dropdowns:

- Asset Group:** A dropdown menu with options like '--Select--', 'All', and 'Description'. Below it is a text area with a scroll bar and a link 'check spelling'.
- Asset Type:** A text input field.
- Asset Type Code:** A text input field.
- Comments:** A text area with a scroll bar and a link 'check spelling'.
- Class Type:** A dropdown menu with options like '--Select--', 'Asset ID Mask', and 'Record Status'.
- Asset ID Mask:** A dropdown menu with options like '--Select--'.
- Record Status:** A dropdown menu with options like 'Active'.
- Master Inventory in GIS:** A checkbox labeled 'Master Inventory in GIS'.
- Asset Type as Resource:** A dropdown menu with options like '--Select--'.

3. Enter the search criteria in the Asset Type detail fields that display. For a description of the fields, see [Table 188: Asset Type Fields](#).
4. Click **Submit**.

Accela Civic Platform - Asset returns a list of asset types that match the search criteria.

The screenshot shows a table listing asset types. The columns are: Icon, Asset Group, Asset Type, Class Type, Template ID, Asset Type Code, and Asset ID Mask. The rows are:

Icon	Asset Group	Asset Type	Class Type	Template ID	Asset Type Code	Asset ID Mask
	Water	Fire Hydrant	Point	Fire Hydrant		Default
	Street	Light	Point	Street Light		Street/Light

5. Click the link to the Asset Type you want to work with.

Editing an Asset Type

You can make modifications to existing asset types when information changes. For example, if the icon changes or you need to update the asset ID mask. For more information about updating the asset ID mask, see [Assigning an Asset ID Mask](#).

When you update the asset type, Accela Civic Platform - Asset updates system data so users can view the updated data in the asset portlet.

To edit an asset type

1. Access the Asset Type Administration portlet ([Accessing the Asset Type Administration Portlet](#)).
2. Click the **Asset Type** link you need to update.

Accela Civic Platform - Asset displays the Asset Type detail portlet.

Asset Type: Fire Hydrant

Asset Type: Fire Hydrant

Asset Group: Water

Asset Type: Fire Hydrant

Class Type: Point

Asset ID Mask: Default

Record Status: Active

Icon: water_hydrant.gif

Asset Type as Resource:

Master Inventory in GIS:

3. Update the Asset Type fields that display. For a description of the fields, see [Table 188: Asset Type Fields](#).
4. Click **Submit**.

Accela Civic Platform - Asset updates the Asset Type detail portlet.

Deleting an Asset Type

You can delete asset types when they become outdated or you no longer need them. For example, an agency starts outsourcing all small maintenance tasks to a local company. For example, if you do not keep small maintenance supplies in the agency offices, you can delete the small maintenance asset types.

After you delete an asset type, it no longer displays in the asset type drop-down when a user creates a new asset. However, Civic Platform does not delete the assets within the asset types, it just labels them inactive.

To delete an asset type

1. Access the Asset Type Administration portlet ([Accessing the Asset Type Administration Portlet](#)).
2. Select each asset type you want to remove. You can do a search for assets to locate them before deleting. See [Searching for Asset Types](#) for more information.
3. Click **Delete**.

Accela Civic Platform - Asset deletes the selected asset type and then updates the Asset Type list portlet.

Requiring the Asset Size Field

You can track the size of certain types of asset, for example if you want to use asset size information when reporting costs from work orders to assets. You can require that users complete the Asset Size field for asset types that belong to the Linear, Node-Link Linear, and Polygon asset class types.

The asset type you edit or create must belong to the Linear, Node-Link Linear, or Polygon asset class type to require the Asset Size field.

For more information on asset class types, see [Working with Asset Class Types](#).

To require the asset size field for an asset type

- Find an asset type or create a new asset type for which you want to require the Asset Size field.

To find an existing asset type, see [Searching for Asset Types](#).

To create a new asset type, see [Creating an Asset Type](#).



Note:

The asset type you edit or create must belong to the Linear, Node-Link Linear, or Polygon asset class type to require the Asset Size field.

- Select **Require Size** in the asset type detail portlet.

The screenshot shows the 'Asset Type' detail page for 'Sewer Main'. The 'Require Size' checkbox is checked and highlighted with a red border. Other fields shown include 'Asset Group' (Sewer), 'Asset Type' (Main), 'Class Type' (Linear), 'Template ID' (Sewer Main), 'Asset Type Code' (Default), 'Description' (Main), and 'Comments' (Default). The 'Asset ID Mask' dropdown is set to 'Default'. The 'Icon' section shows a standard icon for 'sewer_main.gif'. The 'Record Status' is 'Active'. The 'Master Inventory in GIS' checkbox is unchecked. The 'GIS Layer' dropdown is set to 'Select'. The 'Asset Type as Resource' checkbox is unchecked.

- Click **Save**.

Accela Civic Platform - Asset updates the asset type to require users to complete the Asset Size field.

Associating an Asset Type with Work Order Types

When you create an association of an Asset Type with types of Work Orders, you consolidate and filter data displayed for users to view during daily processing. As a result, the user only sees applicable work order types for that particular asset type, which eliminates the possibility of accidentally choosing an invalid option from a large list of choices.

You can define, edit, and remove the Work Order types and Asset Types resulting in the ability to have many Work Order types associated with many Asset Types and many Asset Types associated with many Work Order types.

To associate an Asset Type with a Work Order type

1. Access the Asset Type Administration portlet ([Accessing the Asset Type Administration Portlet](#)).
2. Choose an Asset Type to which you want to assign a Work Order type. Use one of the options below:
 - Click an Asset Type in the navigation tree.
 - Click an Asset Type from the Asset Type portlet list.
3. Click the tab **Work Order Types** in the **Asset Type** detail portlet.

Civic Platform displays a list of Work Orders associated with the Asset Type

Asset Type: Main				
Asset Type		Work Order Types (4)		Rating Types (0)
Record Type	Updated Date	Updated By	Record Status	Record Type Alias
AMS/Sewer/Main/Install	01/31/2012	ASSET_ADMIN	Active	Install Sewer Main
AMS/Sewer/Main/Mainten...	01/31/2012	ASSET_ADMIN	Active	Sewer Main Maintenance
AMS/Sewer/Main/Repair	01/31/2012	ASSET_ADMIN	Active	Sewer Main Repair
AMS/Sewer/Main/Televise	01/31/2012	ASSET_ADMIN	Active	CCTV

4. Click **Assign**.

Civic Platform displays a Record Type navigation tree.

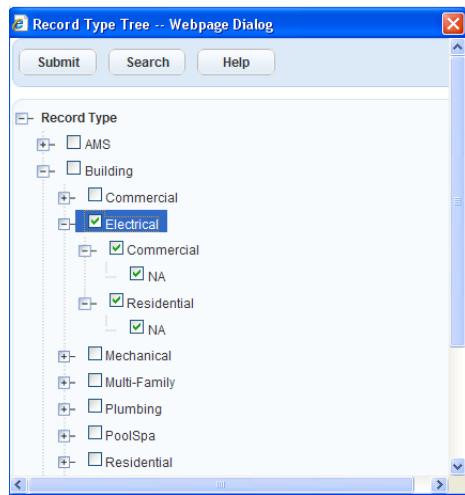


5. Select the Work Order types that you want to associate with the Asset Type.

You can click **Search** to locate a Work Order by typing all or part of the Work Order name.

6. Click **OK**.

If you select a higher level of organization, you also select its subordinate levels.



7. Click **Submit**.

Civic Platform displays a success message.

Synchronizing Assets with GIS

An agency can designate GIS as the master asset inventory, in which case Civic Platform reads the asset inventory from GIS and provides spatial representation of assets on the Accela GIS map.

A GIS asset sync:

- Synchronizes asset records of selected asset types with GIS data.
- Can be submitted on the Asset Type administration portlet or through a batch job on the Batch Jobs portlet using the Asset/GIS Sync service category.
- Requires asset type and GIS mapping configuration on the Asset Type administration portlet.
- Gets the GIS objects from the configured GIS layer, compares them with Civic Platform assets of the selected asset types, and synchronizes GIS objects and assets as follows:
 - If a GIS object ID matches an asset ID, asset sync updates the existing asset with any GIS attributes that are mapped to asset attributes. If GIS attributes are not mapped to asset attributes on the Asset Type administration portlet, the asset is not updated.
 - If a GIS object ID does not match an asset ID, asset sync creates a new asset using the GIS object ID as its asset ID. The asset attributes are populated with GIS attributes, if GIS attribute mapping has been defined.
 - Writes informational and error messages to a log during the sync process. When an error is encountered, asset sync does not stop; it writes the error details in the log and continues until the sync process is complete.

After you perform a GIS asset sync, back-office users can plot up-to-date asset records on the Accela GIS map. From an Asset list, users can select assets and show them on the map. From the map dashboard, users can select assets and show associated records or create records.

Topics

- [Using the JavaScript GIS asset sync version](#)
- [Performing a GIS asset sync](#)
- [Reviewing the GIS Sync Log](#)
- [Linking GIS Attribute Fields to Asset Type Fields](#)
- [Syncing Asset Types with Feature Classes and Related Tables](#)
- [Creating a GIS Asset Sync Batch Job](#)

Related documentation:

- For details about creating or editing an asset type, see [Creating an Asset Type](#) and [Editing an Asset Type](#).
- For details about configuring Accela GIS, see [Accela GIS Administrator Guide](#).
- For details about creating and managing an asset inventory, see [Accela Civic Platform User Guide > Assets](#).

Using the JavaScript GIS asset sync version

By default, GIS asset sync uses the legacy implementation which invokes SOAP-based web services or SOAP-based API. If your agency intends to transition from the legacy version into the more modern version which uses internal REST API asset sync functions, set the **USE_GIS_REST_API** standard choice to **Yes** in Civic Platform Administration.

Otherwise, if you want to continue using the legacy version of GIS asset sync, do not configure the **USE_GIS_REST_API** standard choice or set it to **No**.

Performing a GIS asset sync

Performing a GIS asset sync consists of the following general steps:

1. For each asset type to be synchronized with GIS, configure the GIS service, layer, and ID mapping information. Optionally specify additional GIS attribute mapping if you want to synchronize additional GIS attributes. See [Configuring an asset type with GIS mapping information](#).
2. For each asset type to be synchronized, submit a GIS asset sync either manually (see [Manually synchronizing asset type records with Accela GIS](#)) or through a batch job at regular intervals (see [Creating a GIS Asset Sync Batch Job](#)).

Configuring an asset type with GIS mapping information

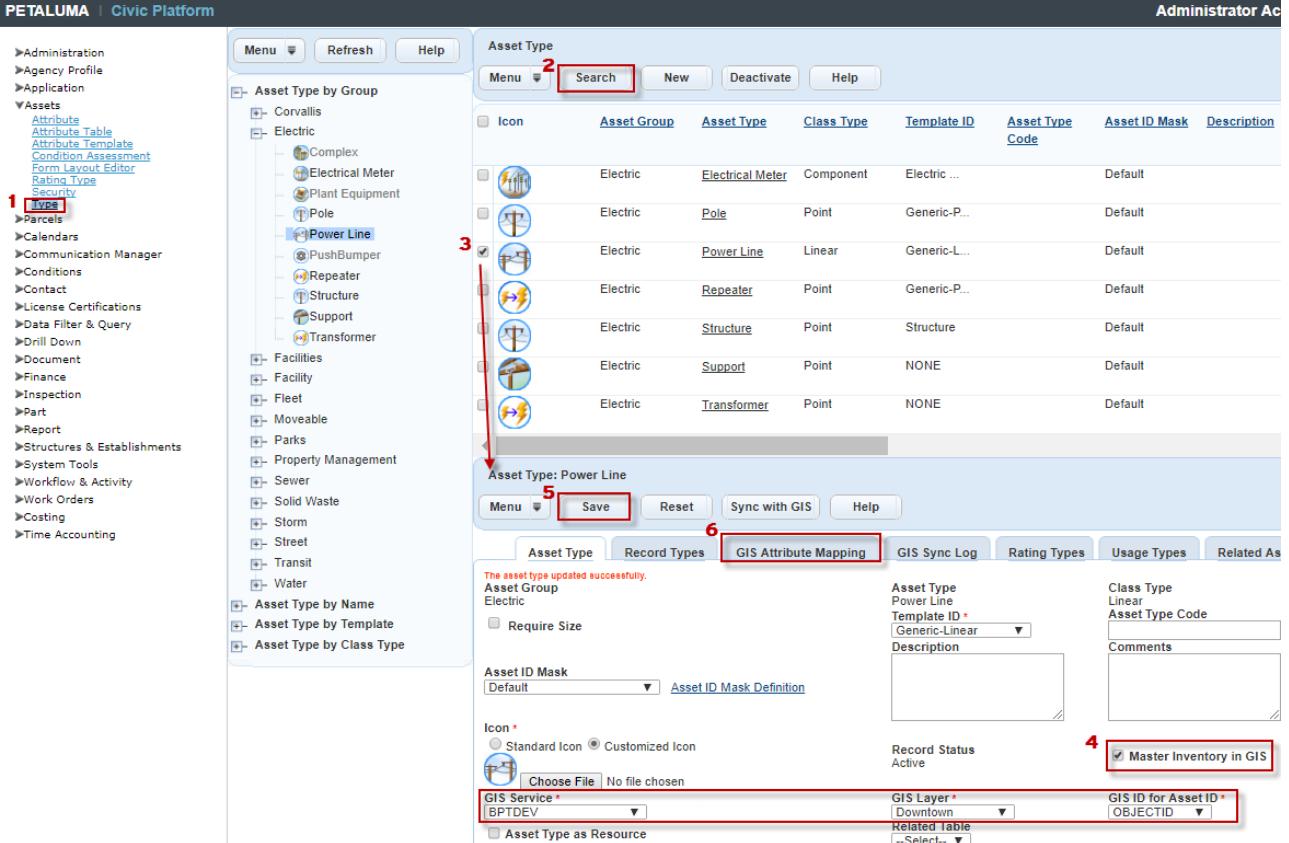
To configure the GIS mapping information for each asset type that needs to be synchronized with GIS data:

1. Go to **Civic Platform Administration > Assets > Types > Asset Type** administration portlet.
2. Search for the asset types you want to synchronize with Accela GIS.
3. Select the asset type you want to configure. Civic Platform shows the **Asset Type** details at the bottom of the asset type list.
4. Mark the **Master Inventory in GIS** checkbox, and fill-in the following GIS information:
 - **GIS Service** - The GIS service that stores the information about GIS objects. The GIS services listed on the dropdown list are configured in Accela GIS administration site.
 - **GIS Layer** - The GIS layer on the selected GIS service that stores the GIS objects. In Esri ArcMap, a feature class is represented visually on the map as a layer.
 - **GIS ID for Asset ID** - The GIS ID field that you want to map to the asset ID. If you specify a related table, this drop-down list is populated with the fields in the table. Otherwise, this drop-down list is populated with the fields in the GIS layer (feature class).
 - **(Optional) Related Table** - If the asset type is the parent of other asset types or if the asset type does not relate to any other asset types, you do not need to complete this field. If the asset type is considered as the child of another asset type, select the table that this asset type maps to. This drop-down list is populated with all the stand-alone tables that the GIS layer (feature class) relates to in the geodatabase.
5. Click **Save**.

6. If you want to copy GIS attributes to Civic Platform fields during the asset sync, click the **GIS Attribute Mapping** tab to map the GIS attributes. For details, see [Linking GIS Attribute Fields to Asset Type Fields](#).

 **Note:** The **GIS Attribute Mapping** tab only shows if you mark the **Master Inventory in GIS** checkbox and select GIS service, layer, and ID.

The following diagram illustrates the steps to configure GIS information on the Asset Type administration portal:



The screenshot shows the Asset Type administration portal for the PETALUMA Civic Platform. The left sidebar shows navigation links under Assets, with 'Types' selected. The main area displays a list of Asset Types categorized by Group (e.g., Electric, Facilities) and Sub-type (e.g., Power Line, Pole, Transformer). A red box labeled '2' highlights the 'Search' button. A red box labeled '3' highlights the 'Select' checkbox for the 'Power Line' asset type. A red box labeled '5' highlights the 'Save' button. A red box labeled '6' highlights the 'GIS Attribute Mapping' tab. A red box labeled '4' highlights the 'Master Inventory in GIS' checkbox, which is checked. The bottom section shows GIS mapping configuration fields: Asset Type (Power Line), Asset Group (Electric), Template ID (Generic-Linear), Class Type (Linear), Asset ID Mask (Default), Record Status (Active), and GIS Service (BPTDEV). The 'Master Inventory in GIS' checkbox is checked.

Manually synchronizing asset type records with Accela GIS

This procedure assumes that the asset types you want to synchronize with Accela GIS have been [configured with GIS mapping information](#). You can manually synchronize one asset type or multiple asset types.

1. Go to Civic Platform Administration > Assets > Types > Asset Type administration portlet.
2. Search for the asset types you want to synchronize with Accela GIS.
3. If you want to synchronize multiple asset types at a time:
 - a. On the asset type list, select the asset types you want to synchronize.
 - b. Choose **Menu > Sync Selected with GIS**. For example:

Asset Group	Asset Type	Class Type	Template ID	Asset Type Code	Asset ID Mask
STRUCTURE	DEMO TYPE	Point	Sewer Main	Component...	
Vater	Hydrant	Point	Manhole	HY	Water/Hyd...
Wastewater...	Manhole	Point	Manhole	MH	Wastewater...
Street	Street Light	Point	Street Light	SL	Street/St...
Water	Water Valve	Point	AAM0821		Water Valve
Component	Ioo	Point	Asset-1		

4. If you want to synchronize only one asset type, select the asset type on the list, and click **Sync with GIS** on the **Asset Type** detail pane below the asset type list. For example:

The screenshot shows the Asset Type administration portlet. At the top, there is a list of asset types. In the second row, the 'Wastewater...' asset type is selected, indicated by a checked checkbox and a highlighted row. Below the list, a detailed view for the selected 'Manhole' asset type is displayed. The 'Sync with GIS' button is highlighted with a red box. The detailed view includes fields for Asset Group (Wastewater - Sewer), Asset ID Mask (Wastewater - Sewer/Manhole), Icon (Standard Icon), Record Status (Active), and various class and template details.

5. After the GIS asset sync is complete, click the **GIS Sync Log** tab to view any errors from the synchronization. Error messages are listed by date, time, and asset ID.

For a list of common error messages, see [Table 187: GIS Sync Log Error Messages](#).

Reviewing the GIS Sync Log

Review the GIS Sync Log for each asset type after you synchronized it with Accela GIS. There is no master GIS sync log if you synchronize multiple asset types at a time. The error messages displays by date, time, GIS ID, Asset ID, Attribute Name, and reason.

To review the GIS Sync Log list

- On the **Asset Type** administration portlet, search and select the asset type which you want to review. Civic Platform displays the asset type details in the detail portlet.
- Click the **GIS Sync Log** tab.

Asset Type: Establishment_ObjectID		Menu		Delete	Delete All	Help																																																																													
Asset Type		Work Order Types (0)		GIS Attribute Mapping (0)		GIS Sync Log (12102)																																																																													
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3. Review the error messages. See [Table 187: GIS Sync Log Error Messages](#) for a list of common error messages.
 4. Make any adjustments or corrections, if applicable.
 5. Clean up the GIS Sync Log by doing one of the following options.
 - To clear the entire GIS Sync Log, click **Delete All**.
 - To delete one record at a time, select the error and click **Delete**.

Table 187: GIS Sync Log Error Messages

Error Message	Description and Resolution
Duplicated in GIS	This error means that the specified GIS ID exists multiple times in the GIS layer. Civic Platform already created the relationship between Accela GIS and the asset record during a previous synchronization. Civic Platform does not allow for duplicate asset ID's in the same Asset Type. The second attempt to save the record in GIS triggers this error message.
ID field NULL or Blank in GIS	This error means that the returned GIS object's ID (for Asset ID) is null or blank. Resolution: Edit the GIS data and make sure each record has a unique value for the ID.
ID exists in Civic Platform as expired or inactive asset	This error means that the Asset ID in Accela Civic Platform - Asset not current or inactive, so it did not synchronize with GIS. Resolution: Determine if the asset is active or expired. If expired, remove from the GIS layer. If active, then correct the data in Accela Civic Platform - Asset.
ID in Civic Platform has no match in GIS	This error means that there is an existing record in Civic Platform that did not have a match in GIS. Resolution: Verify that the record in Civic Platform is valid. If it is, then add the record to GIS and synchronize. If the asset is no longer active, then expire the asset in Civic Platform.
GIS ID links to another asset record in Civic Platform	This error means that the listed GIS feature already has a link to another asset record in Civic Platform. Resolution: Research the existing link and remove it or correct the GIS data to map to the correct Asset Type.

Linking GIS Attribute Fields to Asset Type Fields

Civic Platform can import attribute information from Accela GIS to an asset type during synchronization. If you want to do this, you must specify the fields where you want the attribute data stored in Civic Platform.

You do this by mapping GIS attribute fields to their corresponding Civic Platform attribute fields. For more information about where the GIS attribute comes from and how Civic Platform determines its maximum field length, see “Understanding Field Mapping” the *Accela Extension for Esri ArcMap User Guide*.

If an asset attribute links to a GIS attribute that associates with coded domains, the asset attribute shows the coded domain description of the GIS attribute. You must make sure the data type of the GIS attribute coded domain is compatible with the linking asset attribute, or the attribute does not show any value. For more information on creating GIS attribute coded domains, connect to the <http://resources.arcgis.com>ArcGIS Resource Center and see the following help topic: http://help.arcgis.com/en/arcgisdesktop/10.0/help/index.html#/A_quick_tour_of_attribute_domains/001s00000001000000/A quick tour of attribute domains.

To link a GIS attributes to Civic Platform asset attributes

1. Go to **Civic Platform Administration > Assets > Types > Asset Type** administration portlet.
2. Search for the asset type in which you want to link attribute fields.
Civic Platform displays the asset type details in the detail portlet.
3. Click the **GIS Attribute Mapping** tab.

GIS Attribute	Type	Length	AA Attribute
ENTRY_DATE	Date		None
OBJECTID	Number	4	None
OBJECTID_1	Number	10	Useful Life (Number,15,2)
PIPE_SIZE	Number	4	None
PRERELATE	Number	8	None
PROJECT_ID	Number	8	Start Value (Number,17,4)
SOURCE	Text	2	Status (Text,30)
STATUS	Text	1	Asset Name (Text,50)
Shape_Leng	Number	8	Model Year (Number,10)
TYPE	Text	3	Serial # (Text,30)
WATERINFO	Text	9	Department (Text,10)
YEAR_BUILT	Text	4	Model (Text,10)

4. Use the drop-down lists to select the appropriate Civic Platform fields to link to the GIS Attribute fields.



Note: Make sure that each Civic Platform attribute is of the same data type and at minimum the same data length with the mapped GIS attribute. For a numeric Civic Platform attribute that has decimal places, make sure both its integer and its fraction length is no less than that of the mapped GIS attribute. Otherwise, you cannot save the mapping.

5. Click **Submit**.

Civic Platform displays a message that the GIS Attribute Mapping updated successfully.

Syncing Asset Types with Feature Classes and Related Tables

If your agency uses Esri’s geodatabase as the main repository of assets and GIS objects, you can sync a feature class in Esri’s geodatabase to an asset type in Civic Platform, and sync a standalone table related to the feature class to another asset type. After you sync asset types with Accela GIS, you establish the parent and child hierarchy of assets in Civic Platform.

Topics

- [Understanding GIS Requirements](#)

- Syncing Asset Types with Feature Classes and Tables
- Viewing Related Asset Types

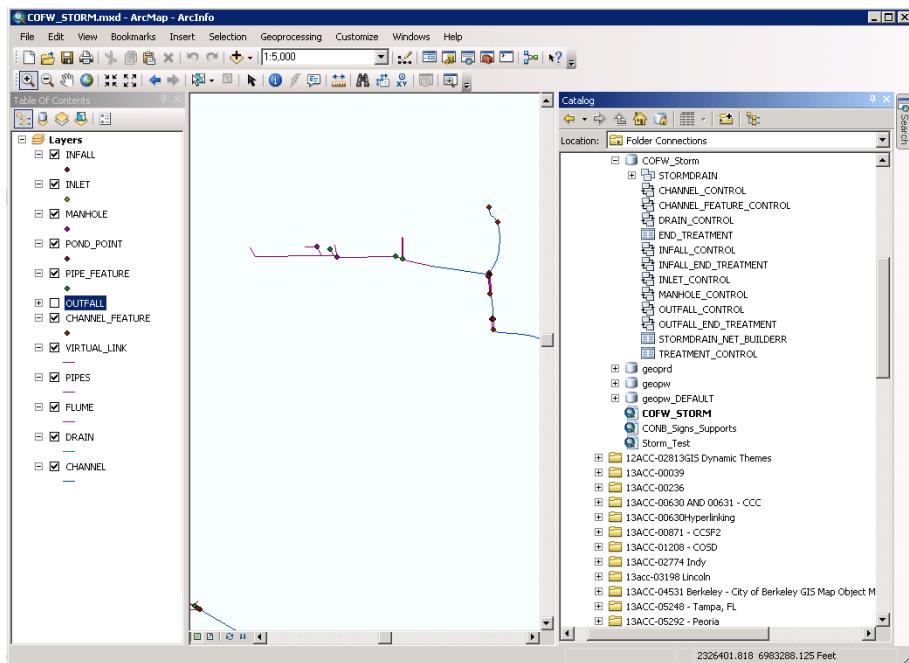
Understanding GIS Requirements

Before you map and sync asset types in Civic Platform with feature classes and their related tables in Esri's geodatabase, ensure that you have added the related tables into your map document (.mxd). This allows the Related Table drop-down list in the Asset Type edit form to retrieve the table names for your selection. Later you must publish the map service with the map document and integrate the map service into Accela GIS for Civic Platform use.

This section provides you with instructions about how to add the tables that relate to feature classes into your map document. For more instructions about how to publish a map service and how to integrate the map service into Accela GIS, see the *Accela GIS for ArcGIS Server Configuration Guide* and the *Accela Civic Platform GIS Administrator Guide*.

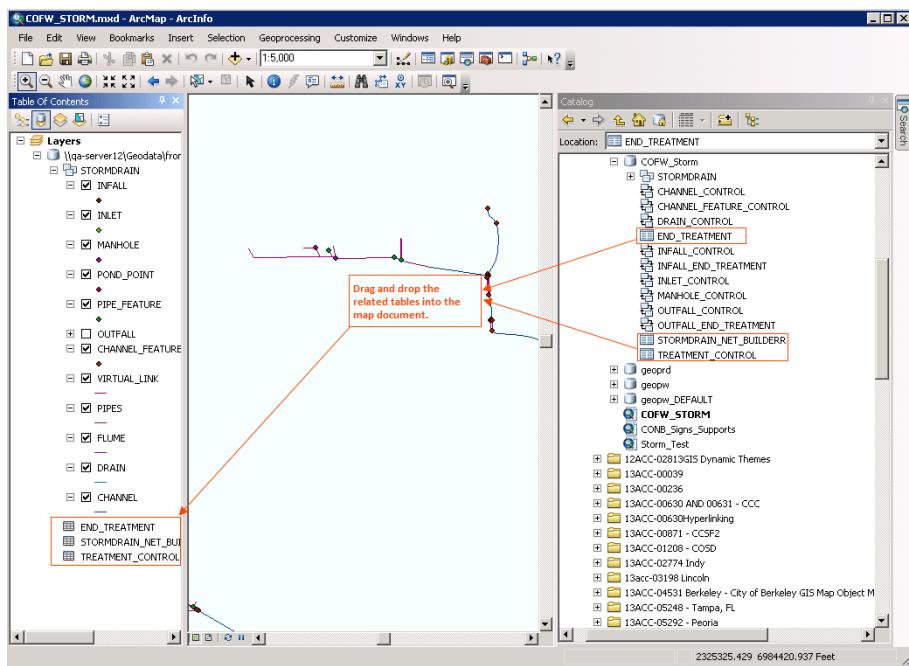
To add feature-class-related tables into a map document

1. Open your map document (.mxd) in Esri ArcMap.



2. Drag and drop the tables that relate to feature classes into the map document.

The Layers panel in Esri ArcMap lists the related tables, which do not display in the Layers panel in Accela GIS.



3. Save your map document and publish it as a map service.

Syncing Asset Types with Feature Classes and Tables

If your agency uses Esri's geodatabase as the main repository of assets and GIS objects, you can map and sync feature classes and their related tables in an Esri geodatabase to asset types in Civic Platform.

A feature class in the geodatabase (see [Figure 67: Feature Classes and Tables in the Geodatabase](#)) is represented visually on the map as a layer and contains a collection of common features with the same spatial representation, such as points, lines, or polygons. A stand-alone table in the geodatabase provides descriptive information about features or contains a collection of features without spatial representation. Your agency can associate objects in one feature class with objects in another, or associate objects in one feature class with records in a table. However, you can only sync the relationships between the objects in a feature class and records in the related tables in the geodatabase to the parent and child hierarchy of assets in Civic Platform. The relationships between objects of different feature classes cannot be synced to Civic Platform.

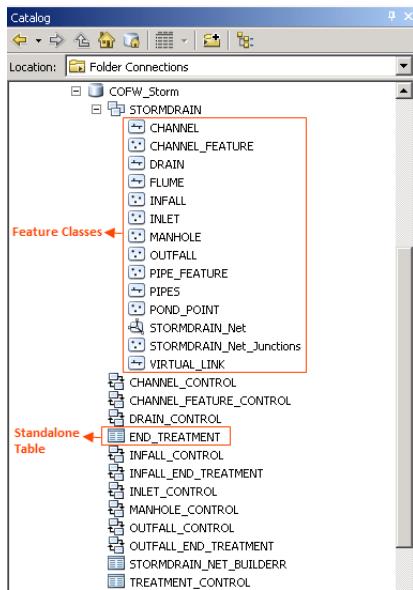


Figure 67: Feature Classes and Tables in the Geodatabase

The asset type that a feature class is mapped to is the parent asset type while the asset type that a stand-alone table is mapped to is the child asset type. When you perform a synchronization for the parent asset type, Civic Platform does the following for both the parent asset type and the child asset type.

- Syncs the relationship between assets and GIS objects with GIS
- Syncs asset attribute fields with GIS attribute fields, if the GIS attribute mapping is established
- Syncs the parent and child hierarchy of assets based on the relationship in which the related table participates

When you perform a synchronization for the child asset type, Civic Platform syncs the relationship between assets of this type and GIS objects with Accela GIS, and syncs asset attributes with GIS attributes, as needed. Civic Platform does not synchronize the parent asset type or the sibling asset type with Accela GIS.

Use Case Example

Your agency has a point feature class of sign supports and a table containing traffic signs. And inspectors use Civic Platform to perform inspections and maintenance on both the supports and the signs. The Sign Supports feature class already relates to the Traffic Signs table in the geodatabase. All you need to do in Civic Platform is to map the Sign Supports feature class to an asset type and the Traffic Signs table to another asset type, and then sync the asset types with Accela GIS.

To sync asset types with feature classes and related tables

1. Go to **Civic Platform Administration > Assets > Types > Asset Type** administration portlet.
2. Search for and select the asset type that you want to map to a feature class.
3. In the Asset Type tab, select **Master Inventory in GIS**.

This option allows you to map a feature class (GIS layer) or its related table in the geodatabase to the asset type in Civic Platform. If you want to remove the mapping, clear this check box.

Civic Platform makes the GIS-related fields editable.

Asset Type: Infall

Asset Group: Water

Asset Type: Infall

Template ID: Adopt Participants

Class Type: Point

Asset Type Code:

Description:

Comments:

Icon: Standard Icon (camera.gif)

Record Status: Active

Master Inventory in GIS:

GIS Service: COFW_STORM

GIS Layer: INFALL

GIS ID for Asset ID: UNIQUE_ID

Related Table: -Select-

4. Complete the following GIS-related fields. For a description of the fields, see [Table 188: Asset Type Fields](#).

- GIS Service
- GIS Layer
- GIS ID for Asset ID
- (Optional) Related Table

5. Click **Save**.

6. Go to the GIS Attribute Mapping tab and map each GIS attribute field to a Civic Platform field.

For more instructions about creating the field mappings, see [Linking GIS Attribute Fields to Asset Type Fields](#).

Note: If you specify a related table for the asset type, the GIS Attribute Mapping tab lists the fields in the related table as the GIS attribute fields. Otherwise, it lists the fields in the GIS layer (feature class).

7. Search for and select another asset type, and then complete through to map it to the feature class related table.

8. Return to the Asset Type tab for the parent asset type, and then click the **Sync with GIS** button.

For more instructions, see [Performing a GIS asset sync](#).

Civic Platform displays a message prompting the sync progress. When the sync is complete, Civic Platform displays the message "Synchronized successfully with GIS."

Viewing Related Asset Types

After you map a feature class and its related tables in the geodatabase to asset types in Civic Platform, the Related Asset Type tab appears and lists all related asset types for every asset type in the parent and child hierarchy. The Related Asset Type tab is not available for the asset type that does not participate in any relationships with other asset types.

The possible relationships between asset types are parent, child, or sibling relationships. The asset type that maps to a GIS layer (also known as feature class) is the parent while the asset type that maps to a table related to the GIS layer is the child. When a parent asset type has multiple child asset types, the

relationships between child asset types are “sibling relationships.” For more information about establishing relationships between asset types, see [Syncing Asset Types with Feature Classes and Tables](#).

To view related asset types

1. Go to **Civic Platform Administration > Assets > Types > Asset Type** administration portlet.
2. Search for and select the asset type that you want to view its related asset types.
3. Click the **Related Asset Type** tab.

Civic Platform displays a list of related asset types for the asset type. The list is similar to that in the Asset Type administration portlet. The only difference is that the Related Asset Type list has the Relationship column while the Asset Type administration list does not. The Relationship column indicates whether the asset type is the parent, child, or sibling of the current asset type.

Icon	Relationship	Asset Group	Asset Type	Class Type	Template ID	Asset Type Code	Asset ID Mask
	Parent	Water	Infall	Point	Adopt Par...		
	Sibling	Water	Infall_end_treatment	Point	Adopt Par...		

4. Click the link to the asset type that you want to view.

Civic Platform displays the details of the asset type.

Asset Group Water	Asset Type Infall	Class Type Point
<input type="checkbox"/> Require Size	Template ID Adopt Participants	Asset Type Code
Asset ID Mask --Select-- Asset ID Mask Definition123	Description	Comments
Icon <input checked="" type="radio"/> Standard Icon <input type="radio"/> Customized Icon 	Record Status Active	<input checked="" type="checkbox"/> Master Inventory in GIS
GIS Service COFW_STORM	GIS Layer INFALL	GIS ID for Asset ID UNIQUE_ID
<input type="checkbox"/> Asset Type as Resource	Related Table --Select--	

Viewing Rating Types under Asset Type

View the rating types associated to the asset type of the asset record you are working in.

To view rating types under asset type

1. Access the Asset Type Administration portlet ([Accessing the Asset Type Administration Portlet](#)).
 2. Click either the Asset Type icon or the Asset Type ID link of the asset type you want to view.
- Accela Civic Platform - Asset displays the Asset Type Detail view.

- Click the **Rating Types** secondary tab.

Accela Civic Platform - Asset displays the Rating Types linked to the selected Asset Type.

Creating Usage Types

The asset Usage Types allows administrators to specify the usage types that are applicable to specific asset types. Daily agency users can then associate the appropriate unit type to the asset type in Asset management and the appropriate unit interval in the Preventative Maintenance Schedule portlets.

When you configure usage types, a tab called **Usage Types** displays in the Asset Type detail administration portlet. The steps to create an asset type and associate usage types are in [To create an Asset Type and associate Usage Types](#).

The daily agency user selects the Unit Types that are applicable to the specific asset type in the Asset Usage detail form portlet. The corresponding Last Reading and Last Reading Date fields populate with the last usage reading and reading date as read-only fields, for your reference. Users can also select the unit types from the Unit Interval drop-down list in the Preventative Maintenance Schedule detail form portlet.

To create an Asset Type and associate Usage Types

- Access the Asset Type Administration portlet ([Accessing the Asset Type Administration Portlet](#)).
- Create a new Asset Type. Use one of the following options.
 - Click the **Menu** button and select **New Asset Type** from the drop-down list, or
 - Right-click the navigation tree and choose **New Asset Type**, or
 - Go to the Asset Type portlet and click **New**.

Accela Civic Platform - Asset displays the Asset Type detail portlet

- Complete the Asset Type fields as described in [Table 188: Asset Type Fields](#).

The asset ID mask field is an identifier that helps users immediately understand the type of asset. To provide an asset ID mask, see [Assigning an Asset ID Mask](#).

If you select the Master Inventory in GIS box, fields related to this function come into view. For more information about how to synchronize an Asset Type to a GIS layer, see [Synchronizing Assets with GIS](#).

- Click **Save**.

Civic Platform creates the new asset type.

5. Do one of the following optional steps:

- If you choose a node-link linear class type, continue with to associate node types to the asset type.
- If you want to associate one or more asset usage types, perform these substeps:
 1. Ensure that you configured asset usage types as explained in [Creating Usage Types](#).
 2. Click the Usage Types tab.
 3. Click **Look Up** to locate all of the usage types.
 4. Select each Usage Type you want to associate with the selected Asset Type.

<input type="checkbox"/> Usage Type	Usage Description	Updated By	Updated Date	Record Status
<input checked="" type="checkbox"/>	Hours	SYSTEM	05/16/2006	Active
<input type="checkbox"/>	Miles	SYSTEM	05/16/2006	Active

5. Click **Select** to associate the usage types to the asset.

Civic Platform adds the unit types to the Asset Type.

- If you want to associate an asset type with work order types, click the **Work Order Template** tab and complete the fields. For more information on how to associate an asset type with a work order type, see [Searching for Asset Types](#).
Accela Civic Platform - Asset creates the asset type and then displays it in the Asset Type detail portlet.

The asset type created successfully.

Asset Group Water	Asset Type Water Line	Class Type Node-Link Linear
<input type="checkbox"/> Require Size	Template ID* <input type="button" value="Fire Hydrant"/>	Asset Type Code <input type="text"/>
Asset ID Mask <input type="button" value="Select--"/>	Description <input type="text"/> check spelling	Comments <input type="text"/> check spelling
Icon* <input checked="" type="radio"/> Standard Icon <input type="radio"/> Customized Icon 	Record Status Active	<input type="checkbox"/> Master Inventory in GIS
GIS Service <input type="button" value="Select--"/>	GIS Layer <input type="button" value="Select--"/>	GIS ID for Asset ID <input type="button" value="Select--"/>
<input type="checkbox"/> Asset Type as Resource		

6. For node-link linear class type assets, click the **Node Types** tab. The Node Types tab activates only if the asset type contains a node-link linear class type.

Accela Civic Platform - Asset displays the Asset Type list portlet

7. Click **Look Up** to search for asset types to complete the node. For a description of the available lookup fields, see [Table 188: Asset Type Fields](#).

Accela Civic Platform - Asset displays the Node Type lookup portlet.

Asset Type: Water Line

Menu

Asset Type Node Types Rating Types Usage Types

Asset Group --Select--	Asset Type <input type="text"/>	Class Type --Select--
Template ID --All--	Asset Type Code <input type="text"/>	Asset ID Mask <input type="text"/>
Description <input type="text"/>	Comments <input type="text"/>	Record Status Active <input type="button"/>
check spelling		
Master Inventory in GIS <input type="checkbox"/>	Asset Type as Resource --Select--	

8. Click Submit.

Accela Civic Platform - Asset returns the assets that meet the lookup criteria in the Node Types list portlet

Asset Type: Water Line

Menu

Asset Type Work Order Types Node Types Rating Types Usage Types

<input type="checkbox"/>	Icon	Asset Group	Asset Type	Class Type	Template ID	Asset Type Code	Asset ID Mask	Description	Comments	Updated Date
<input type="checkbox"/>		Street	Light	Point	Street Light	Street Light		Street/Light		10/30/2008

9. Select each asset type you want to add to the node types list.

10. Click Select.

Accela Civic Platform - Asset adds the node asset to the non-link linear asset type.

Table 188: Asset Type Fields

Asset Group	Select the asset group identified by the agency.
Asset ID Mask	Enter the prefix you want to use for the asset type. This prefix is the default prefix to an asset type. It is an identifier that can contain strings that help users immediately understand the type of asset. For example, an asset such as a van might use the mask ID 'VAN'. When you create a Van asset its Asset ID is VAN-001. To assign an asset ID mask, see Assigning an Asset ID Mask .
Asset Type	Select the type of asset identified by the agency.
Asset Type Code	Enter the type code used to identify the asset type.
Class Type	Select the asset class type. This list is a system-defined way that Civic Platform groups objects that an agency owns or maintains. For more information on Class Types, see Working with Asset Class Types . For Node-Linear class types, you can define the node types.
Comments	Enter any comments associated with the asset type.
Description	Enter a description for the asset type.
GIS Version for Attribute Edits	Choose the GIS version number. This field creates the GIS Attribute Mapping tab and populates it based on the version specified.
ID Sequence Value	Enter the order number you want to display the asset type in the drop-down list.
Icon	Enter the icon used to visually identify the asset type. To choose a standard icon, click the Standard option, then choose the graphic you want to use. If you want a custom icon, click the Customize option and click Browse to select the file you want to use for the icon.

Master Inventory in GIS	Select this option to synchronize Accela Civic Platform - Asset with GIS objects on a GIS layer or entries in a related table. If you want to disassociate assets from GIS objects or related table entries, clear this check box from an existing asset type. When you select the Master Inventory in GIS option, the following fields become active: GIS Service: Choose the GIS service that stores the information about assets and GIS objects. GIS Layer: Choose the GIS layer that the asset type maps to. In Esri ArcMap, a feature class is represented visually on the map as a layer. Related Table: If the asset type is the parent of other asset types or if the asset type does not relate to any other asset types, you do not need to complete this field. If the asset type is considered as the child of another asset type, select the table that this asset type maps to. This drop-down list is populated with all the stand-alone tables that the GIS layer (feature class) relates to in the geodatabase. GIS ID for Asset ID: Select the GIS attribute that you want to use for the asset ID. If you specify a related table, this drop-down list is populated with the fields in the table. Otherwise, this drop-down list is populated with the fields in the GIS layer (feature class).
Require Size	This option activates when you select the Linear, Node-Link Linear, or Polygon asset class. Select this option to require users to enter the length (for Linear or Node-Link Linear) or area (for Polygon) in the Asset Size field in asset records of the type you are creating.
Template ID	Select a Template ID. The Template ID associates a set of custom attributes to the asset. For more information about templates, see Attributes and Templates .

Working with Asset Class Types

For a description of the fields, see [Table 188: Asset Type Fields](#).

Table 189: Asset Class Types

Component	The component class specifies assets that are independent and do not connect assets together. Components can be mobile objects such as vehicles, or stationery objects such as a building or tools. A component is free of lines and nodes.
Linear	The linear class type indicates a relationship between two assets. For example, a section of street, sidewalk, or runway at the city municipal airport.
Node-link linear	Node-link linear combines assets to indicate an explicit relationship between the assets. Node-link linear requires the user to define the asset ID by identifying the assets on each end of the linear asset. For example, define a sewer main by identifying its end points such as Manholes. Manhole "MH-01" flows to manhole "MH-02" which flows to manhole "MH-03." The node-link linear allows for the creation of the Sewer Main asset by naming the beginning and end point assets of each pipe. In this example, the agency can create two Sewer Main assets such as class type of node-link linear defined as "MH-01 - MH-02" and "MH-02 - MH-03."
Point	The point class type refers to an object that is either independent, or located at the end of a line. For example, a street light, a stop sign, or a speed limit sign.
Polygon	The polygon class type includes assets such as water drainage area, a storm drainage area, or a catch basin.

Topics

- [Associating Node Types with Assets](#)
- [Viewing Asset Node Types](#)

Associating Node Types with Assets

A node type is a type of asset used to link lines together. The Node Type tab activates only for asset types with a Node-Link Linear class type.

To associate an asset node type with an asset

1. Access the Asset Type Administration portlet ([Navigating to the Setup Portlet](#)).
2. Click the **Asset Type** link you want to update the node list. The Asset Type must have a node-link linear class type to set node types.
Accela Civic Platform - Asset displays the Asset Type detail portlet.
3. Click the **Node Types** tab.
Accela Civic Platform - Asset displays the Node Type list portlet.

Node Asset Group	Node Asset Type	Record Status	Updated Date	Updated By	Node Asset Class Type
Street	Light	Active	03/17/2013	ADMIN	Point

4. Click **Look Up**.

Accela Civic Platform - Asset displays the Node Type lookup portlet.

Asset Group --Select--	Asset Type []	Class Type --Select--
Template ID --All--	Asset Type Code []	Asset ID Mask --Select--
Description []	Comments []	Record Status Active
check spelling		
Master Inventory in GIS <input type="checkbox"/>	Asset Type as Resource --Select--	

5. Complete any of the fields that display. For a description of the fields, see [Table 190: Asset Node Type Fields](#).
6. Click **Submit**.
Accela Civic Platform - Asset returns a list of the asset types that match your search parameters.
7. Select the node type you want to add to the asset type.

Icon	Asset Group	Asset Type	Class Type	Template ID	Asset Type Code	Asset ID Mask	Description	Comments	Updated Date
	Street	Light	Point	Street Light			Street/Light		10/30/2008

8. Click **Select**.

Accela Civic Platform - Asset updates the Node Types list portlet.

Table 190: Asset Node Type Fields

Asset Group	Select the asset group. For example: component, line, or node.
Asset ID Mask	Enter a value for the asset ID mask. An ID mask can contain strings that show part of the asset number that Accela Civic Platform - Asset recognizes and acts on before showing the application number.
Asset Type	Enter an asset type. For example: sidewalk, sewer line, or street.
Asset Type Code	Enter a value for the asset type code.
Class Type	Select a class type. For example: component, linear, node-link linear, point, or polygon. To view the node type, you must choose node link linear as the class type.
Comments	Enter comments associated with the node type.
Description	Enter a description of the node type.
Record Status	Select a record status. Select Active to set the record status to active. Select Inactive to set the record status to inactive.
Template ID	Select a template ID. For more information about templates, see Attributes and Templates .

Viewing Asset Node Types

You can view a list of asset types associated with a node. The Asset Type must have a node-link linear class type. After you view the node list, you can add or remove asset types from the list of valid node Asset Types. For more information about adding assets to a node list, see [Associating Node Types with Assets](#).

To view an asset node type

1. Access the Asset Type Administration portlet ([Navigating to the Setup Portlet](#)).
2. Click the **Asset Type** link you want to update the node list. The Asset Type must have a node-link linear class type to set node types.
Accela Civic Platform - Asset displays the Asset Type detail portlet.
3. Click the **Node Types** tab.

Accela Civic Platform - Asset displays the Node Type list portlet.

Node Asset Group	Node Asset Type	Record Status	Updated Date	Updated By	Node Asset Class Type
Street	Light	Active	03/17/2013	ADMIN	Point

Asset Condition Assessments

Condition assessments apply to assets that change or deteriorate over time. These assets may require a visual condition assessment to effectively manage their life cycle.

You can group assets together that require the same condition assessment, enter the condition assessment findings, and create a history of assessments and performed maintenance.

Click a topic title below for full details.

Related Information

[Creating a Condition Assessment Type](#)

[Editing a Condition Assessment Type](#)

[Searching for a Condition Assessment Type](#)

[Deactivating a Condition Assessment Type](#)

[Working with Condition Assessment Attributes](#)

[Working with Observation Attributes](#)

[Viewing Calculated Rating Types](#)

[Working with Asset Ratings](#)

Creating a Condition Assessment Type

When you create a condition assessment type, you create an option in the Condition Assessment drop-down list that displays when a user creates a specific condition assessment. Refer to [Figure 68: Condition Assessment Drop-down List](#).

To include a condition assessment type in a drop-down list, you must associate a rating type to it. For information on creating a rating type and associating it to a condition assessment type, see [Creating a Rating Type](#).

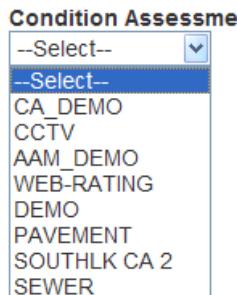


Figure 68: Condition Assessment Drop-down List

To create a condition assessment

1. Access the Condition Assessment portlet ([Accessing the Condition Assessment Portlet](#)).

2. Click **New**.

Civic Platform displays the following.

3. Complete the following fields:

Condition Assessment Enter the type of condition assessment.
 Description Enter a description of the condition assessment.

4. Click **Submit**.

Civic Platform saves your changes and displays a success message.

Editing a Condition Assessment Type

After you create a condition assessment type you can change its description. If the condition assessment type is unused, you can delete it and create a new one.

After you use a condition assessment type, you cannot remove it. Accela Civic Platform - Asset sets it to inactive status; it does not remove it. For more information on removing condition assessments types, see [Deactivating a Condition Assessment Type](#).

To edit a condition assessment type

1. Access the Condition Assessment portlet ([Accessing the Condition Assessment Portlet](#)).
 2. Click the **Condition Assessment** link you want to update.
- Civic Platform displays the following.

The screenshot shows two views of the Condition Assessment portlet. The top view is a list of records with columns: Condition Assessment, Description, Record Status, Updated By, and Updated Date. The bottom view is a detailed edit screen for the record 'PAVEMENT'.

Condition Assessment	Description	Record Status	Updated By	Updated Date
AAM_DEMO	for demo	Active	AAM	11/20/2008
CA_DEMO	For AAM Demo	Active	ADMIN	11/10/2010
CCTV	PACP 4.1	Active	AAM	05/21/2008
DEMO	demo	Active	ADMIN	11/09/2010
PAVEMENT	Check for...	Active	AAM	08/05/2008
SEWER		Active	AAM	08/05/2008
SOUTHLK CA 2	for demo	Active	ADMIN	11/10/2010
WEB-RATING		Active	ADMIN	05/13/2009

Condition Assessment: PAVEMENT

Condition Assessment: PAVEMENT

Detail Attribute (0) Observation Attribute (0) Calculated Rating Types (0)

Condition Assessment	Description	Record Status
PAVEMENT	Check for cracks; level	Active

3. Update the condition assessment **Description**.

To change a condition assessment type you must delete the type and create a new one. For more information about deleting or creating a condition assessment type, see [Deactivating a Condition Assessment Type](#) and [Creating a Condition Assessment Type](#).

4. Click **Submit**.

Civic Platform saves your changes and displays a success message.

Searching for a Condition Assessment Type

Use the following procedure to search for a condition assessment type. If you do not have the full name of the condition assessment type, you can perform a partial text search. For example, to find a condition assessment on a vehicle, enter *veh* into the Condition Assessment field. The search returns all condition assessment types that start with *veh*. When you find the condition assessment type you are looking for, you can view the details, update the description, or remove the condition assessment type. You can also search for an inactive condition assessment to reactivate it.

To reactivate a condition assessment type that removed by mistake, search for inactive records. In the search results select the desired record and change the record status to Active. This reactivates the record, making it available when setting up new condition assessments. Civic Platform restores any attribute detail information originally associated with the condition assessment type.

To search for a condition assessment type

1. Access the Condition Assessment portlet ([Accessing the Condition Assessment Portlet](#)).

2. Click **Search**.

Civic Platform displays the Condition Assessment portlet.

3. Complete any of the fields below:

- | | |
|----------------------|---|
| Condition Assessment | Enter the name of the condition assessment type. |
| Description | Enter a description about the condition assessment type. |
| Record Status | Select active to search for an active condition assessment. Select inactive to search for an inactive condition assessment. |

4. Click Submit.

Civic Platform returns a list of condition assessment types that match your search parameters.

5. Click a Condition Assessment to access it.

Deactivating a Condition Assessment Type

The only way to change the name of a condition assessment type is to deactivate it and create a new one. If you use the condition assessment type or attach something to it, you can only set it to inactive status, you cannot delete it. When you set a condition assessment type to inactive, it is no longer available when creating new condition assessment types. Accela Civic Platform - Asset does not remove it entirely. However, the attributes remain active and available under attributes in the Admin portlet, which is important to note, because you can leverage a single attribute on more than one condition assessment type.

If you remove the condition assessment type by mistake, you can reactivate it by searching for inactive records and changing the status to active. For instructions and information about searching for a condition assessment type, see [Searching for a Condition Assessment Type](#).

To set a condition assessment type to inactive status

1. Access the Condition Assessment portlet ([Accessing the Condition Assessment Portlet](#)).
2. Select the **Condition Assessment** link you want to inactivate.
3. Click **Delete**.

Civic Platform changes the condition assessment type to Inactive status.

Working with Condition Assessment Attributes

Topics

- [Viewing and Editing a Condition Assessment Attribute](#)
- [Associating an Attribute with a Condition Assessment Observation](#)
- [Editing an Observation Attribute Display Order](#)

Viewing and Editing a Condition Assessment Attribute

A condition assessment attribute is a characteristic of a condition assessment, in addition to the information displayed in the main record. Associate condition assessment attributes with the condition assessment type to provide additional detail and information. For example, a hydrant condition assessment has attributes such as test coefficient, flow coefficient, flow hydrant, flow hydrant location.

After you create a condition assessment attribute, you cannot change it. However, you can change the display order of a condition assessment attribute or enable display flags. The only way to change the name of a condition assessment attribute is to remove the attribute type and create a new one. For more information on removing attribute types, see [Attributes and Templates](#).

When you reactivate the condition assessment attribute, all of its attributes return too. This is because the condition assessment type is the parent record, and when it is inactive the relationships are also inactive. You define the attributes separately from the condition assessment type and then you associate them after the fact.

To edit a condition assessment attribute

1. Access the Condition Assessment portlet ([Accessing the Condition Assessment Portlet](#)).
2. Click the link to the **Condition Assessment** that you want to view or edit.
3. Click the **Attribute** tab.

Civic Platform displays the Condition Assessment Attribute tab.

Attribute Group	Attribute Name	Attribute Label	Description	Attribute Length	Default Value	Value Data Type	Is Dropdown List	Unit Type
Facility	YN Attribute	YN Attribute		10		Time	No	

4. Click the **Attribute Name** link.

Civic Platform displays the Attribute Detail portlet.

Attribute Group Facility	Attribute Name YN Attribute	Attribute Label YN Attribute
Description	Attribute Length 10	Default Value
Value Data Type Time	Is Dropdown List No	Unit Type
Display Order 0	Value Required Flag No	Searchable Flag Yes
Display Status Full	Record Status Active	Range Search Flag No

5. Complete the Attribute Detail fields that display. For a description of the fields, see [Table 191: Condition Assessment Attribute Detail Fields](#).

6. Click **Submit**.

Table 191: Condition Assessment Attribute Detail Fields

Attribute Group	Select the attribute group. For example: address, common, employee, equipment, field.
Attribute Label	Enter an attribute label.
Attribute Length	Enter the length of the attribute.
Attribute Name	Enter a name for the attribute.
Default Value	Enter the default setting for the asset attribute
Description	Enter a description about the attribute.
Display Order	Enter a number for the display order.
Is Dropdown List	Select Yes to make the attributes appear in a drop-down list.
Record Status	Select a record status. For example: active, inactive.
Searchable Flag	Select Yes to use the searchable flag.
Unit Type	Select a unit type. For example: dollars, foot, hours, sqft, squaremile, or yard.
Value Data Type	Select a value data type. For example: date, drop-down list, number, text, text area, time, yes/no.
Value Required Flag	Select Yes to require a value flag. Select No not to require the value flag.

Associating Condition Assessment Attributes

Associating attributes with a condition assessment type determines what condition assessment type specific attributes display on the condition assessment details table in the Condition Assessment portlet. For example, an agency wants to record the water quality during a water line condition assessment. You must associate the water quality attribute to the water line condition assessment type. After you associate the attribute with the condition assessment, inspectors are able to record the water quality in the water quality field when they record their findings from the water line condition assessment. For an example of the attributes see [Figure 69: Condition Assessment Detail Fields](#).

The screenshot shows two parts of the Civic Platform interface. The top part is a list of 'Condition Assessment' records:

Condition Assessment	Description	Record Status	Updated By	Updated Date
AAM_DEMO	for demo	Active	AAM	11/20/2008
CA_DEMO	For AAM Demo	Active	ADMIN	11/10/2010
CCTV	PACP 4.1	Active	AAM	05/21/2008
DEMO	demo	Active	ADMIN	11/09/2010
PAVEMENT	Check for...	Active	AAM	08/05/2008
SEWER		Active	AAM	08/05/2008
SOUTHLK CA_2	for demo	Active	ADMIN	11/10/2010
WEB-RATING		Active	ADMIN	05/13/2009

The bottom part is a detailed view for the 'PAVEMENT' record:

Condition Assessment: PAVEMENT					
Detail	Attribute (1)	Observation Attribute (0)	Calculated Rating Types (0)		
Attribute Group	Attribute Name	Attribute Label	Description	Attribute Length	Default Value
Facility	YN Attribute	YN Attribute		10	

Figure 69: Condition Assessment Detail Fields

To associate a condition assessment attribute

1. Access the Condition Assessment portlet ([Navigating to the Setup Portlet](#)).
2. Click the link to the **Condition Assessment** that you want to associate.
Civic Platform displays the Condition Assessment portlet.
3. Click the **Attribute** tab.
Civic Platform displays the Condition Assessment Attribute tab.
4. Click **Look Up** to locate the attribute you want to associate.
5. Enter search criteria in any of the fields to locate the attribute. For a description of the fields, see [Table 191: Condition Assessment Attribute Detail Fields](#).

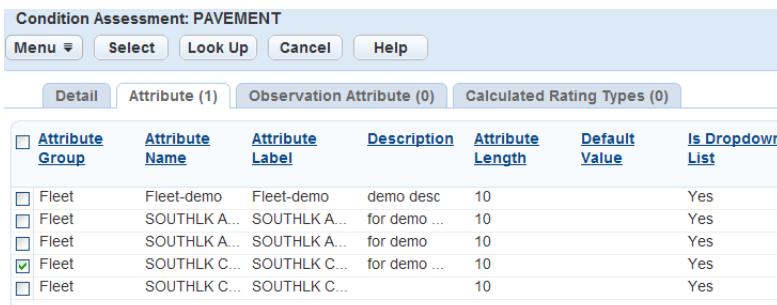
The screenshot shows the 'Attribute' tab of the 'PAVEMENT' condition assessment. It includes various configuration fields:

Attribute Group --Select--	Attribute Name <input type="text"/>	Attribute Label <input type="text"/>
Description <input type="text"/>	Attribute Length <input type="text"/>	Default Value <input type="text"/>
Value Data Type --Select--	Unit Type --Select--	Value Required Flag --Select--
Display Order <input type="text"/>	Record Status Active	Searchable Flag --Select--
Is Dropdown List --Select--	Range Search Flag --Select--	

6. Click **Submit**.

Civic Platform returns a list of the attributes that match your search parameters.

- Select the attribute you want to add to the condition assessment type.



The screenshot shows a dialog box titled "Condition Assessment: PAVEMENT". At the top are buttons for "Menu", "Select", "Look Up", "Cancel", and "Help". Below these are tabs for "Detail", "Attribute (1)", "Observation Attribute (0)", and "Calculated Rating Types (0)". The "Attribute (1)" tab is selected. A table lists attributes with columns: Attribute Group, Attribute Name, Attribute Label, Description, Attribute Length, Default Value, and Is Dropdown List. The table contains six rows, with the fourth row (Fleet, SOUTHLK C...) having a checked checkbox in the first column.

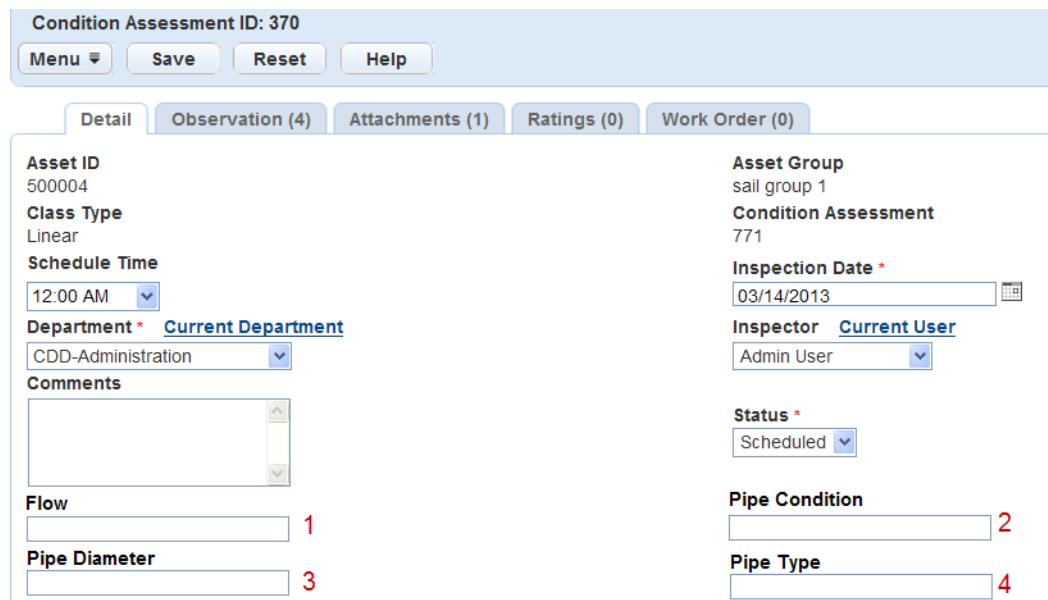
Attribute Group	Attribute Name	Attribute Label	Description	Attribute Length	Default Value	Is Dropdown List
<input type="checkbox"/> Fleet	Fleet-demo	Fleet-demo	demo desc	10	Yes	
<input type="checkbox"/> Fleet	SOUTHLK A...	SOUTHLK A...	for demo ...	10	Yes	
<input type="checkbox"/> Fleet	SOUTHLK A...	SOUTHLK A...	for demo	10	Yes	
<input checked="" type="checkbox"/> Fleet	SOUTHLK C...	SOUTHLK C...	for demo ...	10	Yes	
<input type="checkbox"/> Fleet	SOUTHLK C...	SOUTHLK C...		10	Yes	

- Click **Select**.

Civic Platform associates the attribute.

Editing an Attribute Display Order

The display order determines how the attribute fields display on the asset details tab in the Condition Assessments portlet. For example, you can change the display order of the pipe length attribute from "6" to "1" to have the attribute display as the first attribute in the condition assessment detail portlet. For an example see [Figure 70: Condition Assessment Attribute Display Order](#).



The screenshot shows a dialog box titled "Condition Assessment ID: 370". At the top are buttons for "Menu", "Save", "Reset", and "Help". Below these are tabs for "Detail", "Observation (4)", "Attachments (1)", "Ratings (0)", and "Work Order (0)". The "Detail" tab is selected. On the left, there are fields for Asset ID (500004), Class Type (Linear), Schedule Time (12:00 AM), Department (Current Department: CDD-Administration), Comments (Flow: 1, Pipe Diameter: 3), and Pipe Condition (2). On the right, there are fields for Asset Group (sail group 1), Condition Assessment (771), Inspection Date (03/14/2013), Inspector (Current User: Admin User), Status (Scheduled), and Pipe Type (4).

Figure 70: Condition Assessment Attribute Display Order

To edit a condition assessment attribute display order

- Access the Condition Assessment portlet ([Accessing the Condition Assessment Portlet](#)).
- Click the **Condition Assessment** link you want to update.
Civic Platform displays the Condition Assessment portlet.
- Click the **Attribute** tab.
Civic Platform displays the Condition Assessment Attribute tab.
- Click the **Attribute Name** link for the attribute that you want to move.

Civic Platform displays the Attribute Detail portlet.

Attribute Group	Attribute Name	Attribute Label
Facility	YN Attribute	YN Attribute
Description	Attribute Length	Default Value
Value Data Type	10	Unit Type
Time	Is Dropdown List	Searchable Flag
Display Order	No	Yes
Display Status	Value Required Flag	Range Search Flag
Full	No	No
	Record Status	
	Active	

5. Update the **Display Order** field.

6. Click **Save**.

Civic Platform updates the display order.

Working with Observation Attributes

You can change how an observation attribute displays for a user. For more information about changing the display order, see [Editing an Observation Attribute Display Order](#).

Topics

- [Viewing and Editing Observation Attributes](#)
- [Associating an Attribute with a Condition Assessment Observation](#)
- [Editing an Observation Attribute Display Order](#)

Viewing and Editing Observation Attributes

You can view a list of observation attributes associated with an observation type to see what attributes belong to a particular observation type.

After you create an observation type, you cannot change it. However, you can change its display order and enable display flags.

The only way to change the name of an observation type attribute is to remove the attribute type and create a new one. You can add or remove attributes from a condition assessment type or from an observation level. To make an attribute inactive use the Attribute list portlet.

An attribute is any custom information you define.

Associating attributes with an observation type determines what attribute fields display for an observation. For a sample list of fields, see [Editing an Observation Attribute Display Order](#).

To review an observation attribute

1. Access the Condition Assessment portlet ([Accessing the Condition Assessment Portlet](#)).
2. Click the **Condition Assessment** link you want to view.
Civic Platform displays the Condition Assessment portlet.
3. Click the **Observation Attribute** tab.
Civic Platform displays the Observation Attribute tab.

Condition Assessment: 48						
Menu		Look Up	Delete	Help		
Detail		Attribute (3)		Observation Attribute (4)		Calculated Rating Types (0)
Attribute Group	Attribute Name	Attribute Label	Description	Attribute Length	Default Value	Value Data Type
Observati...	LightType	Type	10		Text	
Structural	NumberOfH...	Number of...	10		Number	
Structural	SM_Cathod...	Cathodic ...	10		Date	
Structural	SM_Diameter	Diameter	10		Number	

4. Click the **Attribute Name** link you want to edit.

Civic Platform displays the Observation Attribute Detail portlet.

Condition Assessment: 48						
Menu		Save	Reset	Cancel	Help	
Attribute Detail			Attribute Value			
Attribute Group	Observation Attribute	Attribute Name	LightType	Attribute Label	Type	
Description		Attribute Length	10	Default Value		
Value Data Type	Text	Is Dropdown List	No	Unit Type		
Display Order	0	Value Required Flag	No	Searchable Flag	No	
Display Status	Full	Record Status	Active	Range Search Flag	No	

5. Complete the Attribute Detail fields that display. For a description of the fields, see [Table 191: Condition Assessment Attribute Detail Fields](#).

6. Click **Save**.

Associating an Attribute with a Condition Assessment Observation

You can look up possible observation attributes that you need to associate with an observation type. Inspectors cannot perform observations unless you have associated attributes with the observation type.

Associating attributes with an observation type determines what attribute fields display on the observation details table in the Condition Assessment portlet.

To associate an observation attribute

1. Access the Condition Assessment portlet ([Accessing the Condition Assessment Portlet](#)).

2. Click the **Condition Assessment** link you want to view.

Civic Platform displays the Condition Assessment portlet.

3. Click the **Observation Attribute** tab.

Civic Platform displays the Observation Attribute tab.

4. Click **Look Up**.

Civic Platform displays the Observation Attribute Lookup page.

Condition Assessment: CCTV

Menu ▾ Submit Reset Cancel Help

Detail Attribute (0) Observation Attribute (0) Calculated Rating Types (6)

Attribute Group --Select--	Attribute Name [Text Box]	Attribute Label [Text Box]
Description [Text Area]	Attribute Length [Text Box]	Default Value [Text Area]
Value Data Type --Select--	Unit Type --Select--	Value Required Flag --Select--
Display Order [Text Box]	Record Status Active	Searchable Flag --Select--
Is Dropdown List --Select--	Range Search Flag --Select--	

5. Enter search parameters in any fields on this page. For a description of the fields, see [Table 191: Condition Assessment Attribute Detail Fields](#).
6. Click **Submit**.
Civic Platform returns a list of all observations that match the lookup parameters
7. Select the attribute you want to add to the observation type.

Condition Assessment: CCTV

Menu ▾ Select Look Up Cancel Help

Detail Attribute (0) Observation Attribute (0) Calculated Rating Types (6)

<input type="checkbox"/> Attribute Group	Attribute Name	Attribute Label	Description	Attribute Length	Default Value
<input type="checkbox"/> Facility	Demo 1	Demo 1		10	
<input checked="" type="checkbox"/> Facility	YN Attribute	YN Attribute		10	
<input type="checkbox"/> Facility	demo2	demo2	desc	10	Text1

8. Click **Select**.
Civic Platform associates the observation attribute.

Editing an Observation Attribute Display Order

The display order determines where the attribute fields display on the observation details tab in the Condition Assessments portal. For example, display position 1 starts on the upper left, position 2 is on the upper right, position 3 is on the left. The fields continue alternating left and right down the screen.

To edit an observation attribute display order

1. Access the Condition Assessment portlet ([Accessing the Condition Assessment Portlet](#)).
2. Click the **Condition Assessment** link you want to view.
Civic Platform displays the Condition Assessment portlet.
3. Click the **Observation Attribute** tab.
Civic Platform displays the Observation Attribute tab.
4. Click the **Attribute Name** link you want to edit.
Civic Platform displays the Attribute Detail portlet.

Condition Assessment: PAVEMENT

Menu Save Reset Cancel Help

Attribute Detail Attribute Value

Attribute Group	Attribute Name	Attribute Label
Facility	YN Attribute	YN Attribute
Description	Attribute Length	Default Value
Value Data Type	10	
Time	Is Dropdown List	Unit Type
Display Order	No	Searchable Flag
<input type="text" value="b"/>	<input checked="checked" type="checkbox"/>	<input checked="checked" type="checkbox"/>
Display Status	Value Required Flag	Range Search Flag
Full	No	No
	Record Status	
	Active	

5. Enter a value in the **Display Order** field.

6. Click **Submit**.

Viewing Calculated Rating Types

You can link each Condition Assessment to a Rating Type. Condition Assessment forms display both the rating given in the condition assessment and the previous rating. Administrators can view the Calculated Rating Types associated with a Condition Assessment.

To view a condition assessment's calculated rating type

1. Access the Condition Assessment portlet ([Accessing the Condition Assessment Portlet](#)).

2. Click the **Condition Assessment** link you want to view.

Civic Platform displays the Condition Assessment portlet.

3. Click the **Calculated Rating Types** tab.

Civic Platform displays a list of calculated rating types.

Condition Assessment: CCTV

Menu Help

Detail Attribute (0) Observation Attribute (1) Calculated Rating Types (6)

Rating Type	Asset Group	Asset Type	Upper Limit	Lower Limit	Manual Entry Rating Value	Updated Date	Updated By	Record Status
Other4Demo	Component	DEMO ASSE...	100	0	Y	11/18/2008	AAM	Active
Structural...	Component	DEMO ASSE...	1,000	0	N	11/18/2008	AAM	Active
Structural	Component	Waterlines	200	100	Y	06/02/2008	AAM	Active
Demo	Node	d	99,999.99	-99,999.99	Y	11/17/2008	AAM	Active
PACP_Stru...	Wastewater...	Main	100	0	Y	02/24/2009	AAM	Active
Structural	Wastewater...	Manhole	100	10	Y	06/02/2008	AAM	Active

Working with Asset Ratings

Topics

- [Creating a Rating Type](#)
- [Editing a Rating Type](#)
- [Searching for a Rating Type](#)

- [Creating a Rating Formula](#)

Creating a Rating Type

Different types of asset require different types of rating. For example, it is useful to have a structural rating for a water line but not for a vehicle. You can have a risk rating for a vehicle but not for a sidewalk. Accela Civic Platform - Asset enables you to create rating types you can use to rate various asset types, including evaluation of the largest or smallest observation scores. When an inspector creates an asset rating, the inspector must choose a rating type from a drop-down menu of possible rating types. You associate each rating type with an asset group, an asset type, and a condition assessment type so that only the relevant rating types appear in the inspector's drop-down list of possible rating types. For example, you can do structural ratings of both waterlines and manholes. You can create one structural rating type and link it to the Waterlines asset type and another structural rating type that you link to the Manhole asset type. When an inspector wants to enter a structural rating for a manhole, only the structural rating type linked to the Manhole asset type appears on the drop-down list of rating types. An administrator sets the value range for each rating type.

You can assign ratings values manually or calculated by Civic Platform using an administrator-defined formula. If you allow manual entry of rating values for a rating type, you can choose whether to create a rating formula for that rating type. If you do not create a rating formula, inspectors must give ratings for that asset manually entering rating values. If you do create a rating formula, inspectors can add manual rating values in addition to the rating values generated by the formula. If you do not allow manual entry of rating values for a rating type, you must create a formula to calculate ratings. See [Creating a Rating Formula](#).

Before you can create a rating type, you must create a condition assessment type and an asset type to associate to the rating type. For information on creating condition assessment types, see [Creating a Condition Assessment Type](#). For information on creating an asset type, see [Asset Types](#). To enable asset groups, configure the ASSET_GROUP Standard Choice. Refer to the *Accela Civic Platform Configuration Reference*.

To create a rating type

1. Access the Rating Type portlet ([Navigating to the Setup Portlet](#)).

2. Click **New**.

Civic Platform displays the following.

The screenshot shows the 'Rating Type' creation form. At the top, there are buttons for Submit, Validate, Reset, Cancel, and Help. Below these are fields for 'Rating Type' (dropdown), 'Condition Assessment' (dropdown), and 'Asset Group' (dropdown). There are also 'Upper Limit' and 'Lower Limit' fields, and checkboxes for 'Manual Entry Rating Value' and 'Script Style' (with options for 'Classic Style' and 'EMSE Style').

The main area is divided into three sections: 'Variables' (listing 'Asset Fields' and 'CA Fields'), 'Operators' (listing '+', '-', '*', '/', '%', and a 'Functions' section), and 'Formula' (a large text area for entering the formula). Below these sections are tabs for 'Expressions' and 'Criteria'.

3. Complete these fields:

Rating Type

Enter a name for the rating type.

Asset Group	Select from a drop-down list of available asset groups. The asset group determines which asset types you can choose from.
Asset Type	Select from a drop-down list of available asset types. The asset type determines which asset fields are available to use as variables for the expression.
Upper Limit and Lower Limit	Enter the maximum and minimum possible rating values.

4. Select a condition assessment from the **Condition Assessment** drop-down menu to assign the Rating Type to.
5. If you select the **Manual Entry Rating Value** option, you can either create a rating formula or leave the formula field blank. If you do create a formula, users can enter manual rating values in addition to the calculated rating values. If you do not create a formula, you must enter rating values manually.
If you do not select the **Manual Entry Rating Value** option, you must create a rating formula.
For information on creating a formula, see [Creating a Rating Formula](#).
6. Click **Submit**.
Civic Platform adds the rating type to your Rating Type list.

Editing a Rating Type

After you have created a rating type and linked it to an asset group and an asset type, you cannot change its name or the link. You can change the condition assessment type for the rating type, as well as the upper and lower limits for the rating values. You can make the ratings read-only or enable users to enter new ratings.

To edit a rating formula

1. Access the Rating Type portlet ([Navigating to the Setup Portlet](#)).
2. Click the **Rating Type** link of the rating type you want to edit.
Civic Platform displays the Rating Type detail portlet.
3. Make the desired changes to the available fields.
4. Click **Submit**.
Civic Platform updates the Rating Type.

Searching for a Rating Type

To search for a rating type

1. Access the Rating Type portlet ([Navigating to the Setup Portlet](#)).
2. Click **Search**.
Civic Platform returns the Rating Type search fields.

3. Enter search criteria in any of the fields and click **Submit**.

Civic Platform returns a list of Rating Types that match your search parameters.

Creating a Rating Formula

You can define rating formulas for each condition assessment/asset type combination. The formula can calculate the rating based on a combination of many factors: condition assessments, work orders, service requests, direct updates, and the asset's rating history. For example, administrators can use specific functions to get the largest or smallest observation scores on a condition assessment. The rating formula also has access to asset details, asset attributes, condition assessment details, and condition assessment attributes. See [Rating Type Portlet](#).

You can manually calculate ratings and you can also set them up to trigger based on the completion of condition assessments. To ensure your rating formula is functional, validate it before applying it to asset records.

Civic Platform stores and date-stamps each rating entry, which enables users to view rating logs and generate graphs of an asset's rating history. Users can also graph the average condition of a group of assets.

Before you create a rating formula, consider the following information:

- You associate rating formulas to asset types, so determine the Asset Type for which you want to create a formula as well as the Asset Group to which it belongs.
- You tie rating types to Condition Assessments, which you in turn tie to Asset Types. So in addition to Asset Type and Asset Group, you must know which Condition Assessment you want to contain the rating formula.
- Expression criteria determine which records a formula evaluates. These criteria can use any type of field, numeric or alphabetic.
- You can only include numeric fields in a formula, so when you determine which fields you want to include in your rating calculation, ensure their value is numeric.
- Accela provides the Sum, Count, Average, Max and Min functions. You can use expressions that work with the functions to determine which records a formula evaluates. These criteria can use any type of field, numeric or alphabetic. To limit the records evaluated by a formula, consider creating an expression for the function.
- Accela gives you options to create either a classic style or EMSE style formula. The classic style only supports simple scripting while the EMSE style allows rather complicated EMSE script. Please read the steps in this section before deciding which option to take.

The screenshot shows the Rating Type Portlet interface. At the top, there are buttons for Submit, Validate, Reset, Cancel, and Help. Below these are fields for Rating Type, Condition Assessment, Asset Group, Asset Type, and Script Style. The Script Style section has radio buttons for Classic Style and EMSE Style. The main workspace is divided into three panels: Variables (listing Asset Fields and CA Fields), Operators (listing Math operators like +, -, *, /, % and Functions), and Formula (a large text area for entering the rating formula). Below the main workspace are sections for Expressions and Criteria, each with icons for trash, copy, and paste.

Figure 71: Rating Type Portlet

To add a rating formula to a rating type

1. Find the Rating Type for which you want to create a formula. See [Searching for a Rating Type](#). Civic Platform displays the rating detail portlet as shown in [Rating Type Portlet](#)
2. If you select the **Manual Entry Rating Value** option for the rating type, you can either create a rating formula or leave the formula field blank. If you do create a formula, users can enter manual rating values in addition to the calculated rating values. If you do not create a formula, you must enter rating values manually.
If you do not select the **Manual Entry Rating Value** option, you must create a rating formula.
3. Select the **Script Style**, and define the rating formula.

Classic Style

In the classic style formula, you must directly specify a field value, or an expression, or a mathematical calculation as the rating value. Although you can use IF-ELSE statement, the statement syntax must stick to either of the following formats:

```
if ($$CRITERIA$$) {} else{}  
  
if ($$CRITERIA$$) {} else if ($$CRITERIA$$) {} else{ }
```

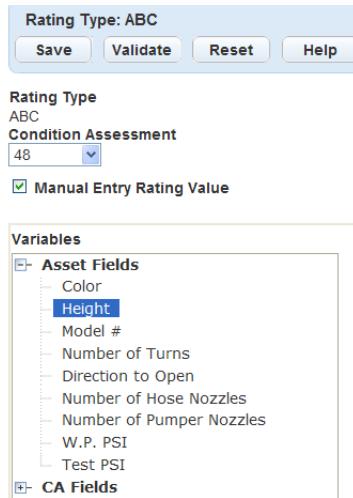
EMSE Style

EMSE Style supports normal EMSE scripts. You can define variables and functions, and use complex IF-ELSE statements in the formula. If you use EMSE style, you must add the following function to set the rating value:

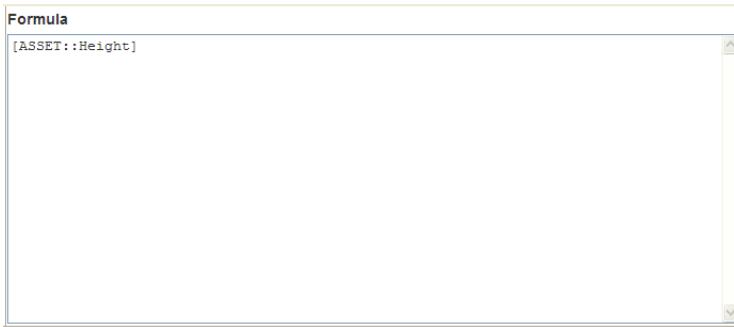
```
ratingFormula.setReturnRating(returnValue)
```

4. Create a rating formula in the **Formula** text area that meets the script style you select in . In the following sub steps, to are applicable to both the classic style and EMSE style; to are only applicable to EMSE style.
 - a. Select a variable from the **Variables** navigation tree to add to the formula.

The variables navigation tree lists all the asset fields and condition assessment fields for the rating type. Use the + and - buttons to expand the navigation tree, find the variable, and then click the variable name to add it in the formula.

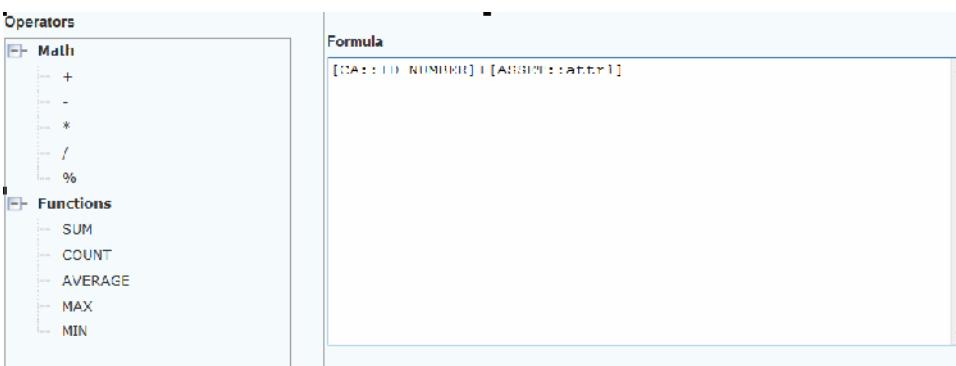


Civic Platform adds the field to the rating formula.



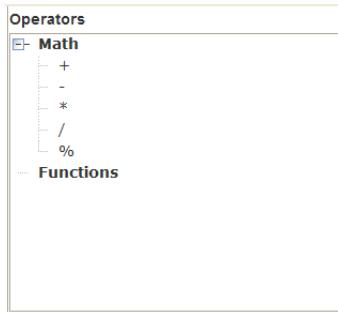
- b. Click one of the **Math** operators from the **Operators** section to apply it to the rating formula. You can choose from the basic mathematical symbols, including [+], [-], [*], [/], and [%].

Civic Platform adds the operator to the rating formula.



- c. Click one of the **Functions** from the **Operators** section for adding the mathematical operation result into the formula.

The **Sum**, **Count**, **Average**, **Max**, and **Min** functions display in the **Functions** category. For description of these functions, see [Rating Formula Functions](#).



Civic Platform displays the following.

The window title is 'COUNT Expression'. It has fields for 'Name' (empty), 'Lookup Table Name' set to 'OBSERVATION', and 'Return Column' set to 'COUNT'. Below these are two rows of criteria. The first row has 'Field Name' set to '--Select--', 'Operator' set to '=', and 'Value' empty. The second row has 'Field Name' empty, 'Operator' set to 'AND', and 'Value' empty. At the bottom right are 'New' and 'Delete' buttons.



d. Create **Expression** with the selected function.

e. Complete the following required fields:

Name	Give the expression a unique name.
Lookup Table Name	Select the table name for the observation associated with the function. The table name you selected affects the options available in the Return column drop-down list.
Return Column	Select a Return Column from this drop-down list. Return Column is the field in the selected condition assessment that the function evaluates.

f. Click **New** in the upper right corner of the window to add a row of criteria to the expression. These criteria determine which values the function includes from the Return Column.



Note:

Adding too many criteria to an expression can cause your system to run slowly or your screen to freeze. To avoid this issue, limit your expression criteria to 30 or fewer.

g. Choose a field from the **Field Name** drop-down list. This list automatically populates with the fields from the selected condition assessment.

h. Choose an operator from the **Operator** drop-down list. For descriptions of available operator, see [Rating Formula Relational Operators](#).

i. Choose an operator from the **Operator** drop-down list. For descriptions of available operator, see [Rating Formula Relational Operators](#).

j. Choose a value from the **Value** drop-down list. The value you select is the value that the criteria queries. For example, if you chose the Date field name and the = operator, you could enter 5/24/08 in the Value field. The function queries only records whose date field contains 5/24/08 as a value.

k. Add additional criteria by clicking the New button. Determine the relationship between each criterion by selecting AND or OR from the last **Suffix** drop-down list.

I. Click **Save** at the bottom of the window to save the expression and add it to the formula.

m. To view or edit an expression, click its hyperlink name, located in the **Expressions** section of the **Rating Type** portlet.

n. Add IF-ELSE statements in the formula. The classic style supports one-level IF-ELSE statements, and the EMSE style supports complex IF-ELSE statements.

You can define criteria to add as criteria in the IF clause. The steps are the same as the criteria definition steps for expressions except that you define the criteria in the **Criteria** section. See step d.

Below is a sample classic style formula with an IF-ELSE statement including a criteria and expression. Note that the "if" and "else" must be in lower case.

```
if ($$CRITERIA::ta$$)

{ $$EXPRESSION::test1$$+$$EXPRESSION::test1$$ }

else if ($$CRITERIA::ba$$)

{ [ASSET::attr1]+10 }

else {0}
```

o. (EMSE style only) Add variables and functions in the formula. You can define variables and functions and use them in the formula, same as in normal EMSE scripts. For information on writing EMSE scripts, see the Accela Civic Platform Scripting Guide.

p. (EMSE style only) Add the function ratingFormula.setReturnRating(returnValue) to set the return value of the formula as the rating value.

Below is a sample EMSE style formula with user-defined variables and functions.

```
var tempValue1, tempValue2;

if ($$CRITERIA::CircleEqual2$$)

{tempValue1=[CA::LengthNum] }

else{tempValue1=[CA::LengthNum]*5

if ($$CRITERIA::MeterLength7$$)

{tempValue2=[CA::LengthNum] }

else{tempValue2=0}

function addLength(a) {return a+tempValue2; }

ratingFormula.setReturnRating(tempValue1+addLength(10))
```

5. Before you save the formula, you can validate it to make sure it contains no errors. Click **Validate**.

Civic Platform returns the validation passed message if the formula meets system criteria.

Civic Platform returns an error message under the following circumstances:

- The formula contains undefined variables.
- The formula contains non-numeric variables.
- The formula contains observation variables that you can only use in defining an expression.
- The formula contains undefined expressions.
- The formula contains undefined criteria. Civic Platform prompts you with correct syntax, if this is a syntax error.

6. Click **Submit**.

Civic Platform updates the Rating Types list portlet.

Table 192: Rating Formula Functions

Sum	This function returns the sum of the values of the selected field for the records that match the expression criteria.
Count	This function returns the number of records whose value for the selected field matches the expression criteria.
Average	This function returns the average value of the selected field for the records that match the expression criteria.
Max Min	Together, these functions return the largest or smallest value of the selected field for the records that match the expression criteria. For example, administrators can use a maximum function and a minimum function in the asset rating formula to get the largest or smallest observation scores on a condition assessment.

Table 193: Rating Formula Relational Operators

!=	Not equal to
<	Less than
<=	Less than or equal to
=	Equal to
>	Greater than
>=	Greater than or equal to
IS NOT NULL	Used to query fields that contain any value, regardless of what that value is. When you use this operator, do not use a variable in the third field.
IS NULL	Used to query fields that do not have a value. For example, you might set up a data filter to query for records assigned to a certain department, but not to any individual within the department. When you use this operator, do not use a variable in the third field.
LIKE	The alphabetic character field values that you want to include in the filter or query contain a string (alphabetic characters). For example, if you want to set up a query to list all contacts with the string "Jeff" in their email addresses, choose "Like" as the relational operator and enter "Jeff" as the value.

IN	<p>This operator can substitute multiple criteria. Enter multiple values, and the operator returns records that match any one of the values.</p> <p>When you use the IN operator in an expression, the values you enter must be uppercase. Civic Platform supports only the values A, B, and C, and not a, b, and c, for example.</p>
----	---

Setting Up a Parts Inventory

Use the part inventory to add one or more new parts. Each time you add a new part to the inventory, Civic Platform calculates the total supply on hand. These parts are also available for use when creating part transactions and when creating work orders.

When you have more than one location for a part, you can update the location and quantity on hand for the part by creating a part transaction. You generate a part transaction each time you assign a part to a work order, a location receives a part order, you transfer a part between locations, you reserve a part, or you make manual stock adjustments.

This section explains how to maintain the part inventory by adding and removing parts, identifying locations, and adding and updating approved contacts.

Click a topic title below for full details.

Related Information

[Adding a New Part Inventory](#)

[Editing a Part Inventory](#)

[Searching a Part Inventory](#)

[Deleting from a Part Inventory](#)

[Managing Part Locations](#)

[Managing Part Contacts](#)

Adding a New Part Inventory

To add a new part to the part inventory

1. In V360 Administration, click the **Part Inventory** main link. If you are using the default settings, this appears on the main console as a hyperlink name.

Civic Platform displays the list of all parts in the parts inventory.

<input type="checkbox"/>	Part Number	Part Type	Part Brand	Part Description	Part Status
<input type="checkbox"/>	123	Meters	Delco	Meter	Active
<input type="checkbox"/>	5.33	Fittings	Delco	Brake Lin...	
<input type="checkbox"/>	5.34	Fittings	Delco	Lug Nuts	
<input type="checkbox"/>	4.55	Fittings	Delco	1 Ton - A...	
<input type="checkbox"/>	5.43	Pipe Tools	Jennigs	3/4" Pipe	

2. Click **New**.

Civic Platform displays the part details portlet.

The screenshot shows a software interface for managing part details. At the top, there are icons for file operations (New, Open, Save, Undo, Redo, Help). Below that is a navigation bar with tabs: Part Detail, Part Transaction, Part Contact, and Part Supply. The main area contains various input fields and dropdown menus. Key fields include:

- Part Number ***: A required field with a placeholder box.
- Part Type**: A dropdown menu showing "-Select--".
- Part Brand**: A text input field.
- Part Description**: A large text area with scroll bars.
- Part Status**: A dropdown menu showing "-Select--".
- Unit Cost**: A text input field showing "0.0000".
- Total Supply**: A text input field showing "0.0000".
- Reorder Quantity**: A text input field.
- Comments**: A large text area with scroll bars.
- Unit of Measure ***: A dropdown menu showing "--Select--".
- Taxable**: A dropdown menu showing "-Select--".
- Minimum Quantity**: A text input field showing "0.0000".
- Maximum Quantity**: A text input field.
- Reorder Due**: A dropdown menu showing "No".
- Calculate Type ***: A dropdown menu showing "Simple".

3. Enter the Part Number first, and then enter the Units of Measure and Calculate Type
4. Complete any of the remaining fields in the part details.
For a list of field descriptions, see [Table 194: Part Inventory Detail](#).
5. Click **Submit**.

Editing a Part Inventory

You can update the part inventory details as needed. For example, a vendor no longer carries a brand of oil filters that your agency uses, but carries a different brand for the same type of an oil filter. In this case, go the part inventory, search for oil filter, and then change the brand in the part details.

To edit a part

1. In V360 Administration, click the **Part Inventory** main link. If you are using the default settings, this appears on the main console as a hyperlink name.
Accela Civic Platform - Asset displays the list of all parts in the parts inventory.

	Part Number	Part Type	Part Brand	Part Description	Part Status
<input type="checkbox"/>	123	Meters	Delco	Meter	Active
<input type="checkbox"/>	5.33	Fittings	Delco	Brake Lin...	Active
<input type="checkbox"/>	5.34	Fittings	Delco	Lug Nuts	Active
<input type="checkbox"/>	4.55	Fittings	Delco	1 Ton - A...	Active
<input type="checkbox"/>	5.43	Pipe Tools	Jennings	3/4" Pipe	Active

2. Click **Search**.
Accela Civic Platform - Asset displays the fields that apply to the part.

The screenshot shows a form titled "Part Detail" with various input fields. Key fields include "Part Number" (with a required asterisk), "Part Description", "Unit of Measure", "Part Type" (dropdown with "Select"), "Part Status" (dropdown with "Select"), "Taxable" (dropdown with "Select"), "Minimum Quantity" (text input "0.0000"), "Maximum Quantity" (text input), "Reorder Due" (checkbox "No"), "Calculate Type" (dropdown with "Simple"), "Part Brand", "Unit Cost" (text input "0.0000"), "Total Supply" (text input "0.0000"), "Reorder Quantity" (text input), and "Comments" (text area).

3. Enter the Part Number if you have it. If you do not have the Part Number, select the Part Type, and then enter the Part Description and Part Brand.

4. Complete any of the fields that display that apply to the part you are searching for.

5. Click **Submit**.

Accela Civic Platform - Asset returns a list of all parts that match your search parameters.

6. Open the part that you want to review and edit by clicking on the part number.

Accela Civic Platform - Asset displays the part details portlet.

<input type="checkbox"/>	Part Number	Part Type	Part Brand	Part Description	Part Status
<input type="checkbox"/>	123	Meters	Delco	Meter	Active
<input type="checkbox"/>	5.33	Fittings	Delco	Brake Lin...	
<input type="checkbox"/>	5.34	Fittings	Delco	Lug Nuts	
<input type="checkbox"/>	4.55	Fittings	Delco	1 Ton - A...	
<input type="checkbox"/>	5.43	Pipe Tools	Jennigs	3/4" Pipe	

7. Update any of the fields that display.

For a list of field descriptions, see [Table 194: Part Inventory Detail](#).

8. Click **Submit**.

Table 194: Part Inventory Detail

Calculate Type	Select the calculate type, Accela Civic Platform - Asset uses this type to calculate the average cost of the part: Simple Average: The average cost is equal to the sum of the unit cost of a current shipment and existing average cost, divided by two. Simple Average provides the average value of the existing average cost and the cost per unit of the current shipment. Weighted Average: This is the same as the Simple Average, but weighted by quantity. Weighted Average means that the existing part quantity is multiplied by the existing average cost and then the quantity of the current shipment is multiplied by the unit cost of the shipment. Then Accela Civic Platform - Asset divides the sum of these values by the total part quantity.
Comments	Enter any comments associated with the part.
Maximum Quantity	Enter the maximum quantity of the part.
Minimum Quantity	Enter the minimum quantity on hand for the part for all locations.

Part Brand	Enter the brand of the part. For example, Valvoline is the brand for motor oil.
Part Description	Enter the description of the part.
Part Number	Enter the part number to identify it in the parts inventory list, for example, enter the manufacturer's part number or the number that your agency uses for the part.
Part Status	Select the status of the part.
Part Type	Select the type of part. Example: Fittings, Fleet, Materials.
Reorder Due	The status of reorder displays "Yes" if the total supply is greater than the minimum quantity. The reorder due displays "No" if the total supply is less than the minimum quantity.
Reorder Quantity	Enter the quantity to you want to reorder.
Taxable	Use this drop-down list to select the status of whether or not the part is taxable.
Total Supply	The total quantity on hand for the part displays in this field. It is a read-only field, which updates based on part inventory.
Unit of Measure	Select the unit of measure for the part. Example: Hours, Miles.
Work Order Task	Select the work order task associated with the part usage. Accela Civic Platform - Asset records part costs only against work order tasks that you complete, or you associate with a workflow task that is either complete or active.

Searching a Part Inventory

An agency can have thousands of parts at various locations. To find a specific fitting you want to replace on the city water main, use a search to enter all information you have on the part to filter the search results. The search criteria might begin with the Part Number. If you do not have the number, identify the Part Type as fittings, because a fitting is the part needed to fix the water main. Then identify the part description and the part brand. The unit cost can also help in limiting your search results.

To search for a part in the part inventory

1. In V360, click the **Part Inventory** main link. If you are using the default settings, this appears on the main console as a hyperlink name.

Accela Civic Platform - Asset displays the list of all parts.

<input type="checkbox"/>	Part Number	Part Type	Part Brand	Part Description	Part Status
<input type="checkbox"/>	123	Meters	Delco	Meter	Active
<input type="checkbox"/>	5.33	Fittings	Delco	Brake Lin...	
<input type="checkbox"/>	5.34	Fittings	Delco	Lug Nuts	
<input type="checkbox"/>	4.55	Fittings	Delco	1 Ton - A...	
<input type="checkbox"/>	5.43	Pipe Tools	Jennings	3/4" Pipe	

2. Click **Search**.

Accela Civic Platform - Asset displays the fields that apply to the part.

The screenshot shows a software interface for managing part details. At the top, there's a toolbar with icons for save, undo, redo, and help. Below the toolbar, tabs for 'Part Detail', 'Part Transaction', 'Part Contact', and 'Part Supply' are visible. The main area contains several input fields and dropdown menus. Required fields are marked with an asterisk (*). The fields include:

- Part Number ***: A text input field.
- Part Description**: A text input field with a scroll bar.
- Unit of Measure ***: A dropdown menu with options like '--Select--' and 'Inches'.
- Maximum Quantity**: A text input field.
- Reorder Due**: A dropdown menu with options like 'No' and 'Yes'.
- Part Type**: A dropdown menu with options like '--Select--' and 'Meters'.
- Part Status**: A dropdown menu with options like '--Select--' and 'Active'.
- Taxable**: A dropdown menu with options like '--Select--' and 'Yes'.
- Minimum Quantity**: A text input field with a value of '0.0000'.
- Calculate Type ***: A dropdown menu with options like 'Simple' and 'Complex'.
- Part Brand**: A text input field.
- Unit Cost**: A text input field with a value of '0.0000'.
- Total Supply**: A text input field with a value of '0.0000'.
- Reorder Quantity**: A text input field.
- Comments**: A text input field with a scroll bar.

3. Enter the Part Number if you have it. If you do not have the Part Number, select the Part Type, and then enter the Part Description and Part Brand.
 4. Complete any of the fields that display that apply to the part you are searching for.
 5. Click **Submit**.
- Accela Civic Platform - Asset returns a list of all parts that match your search parameters.
6. Click the part number for the part you want to review.

Deleting from a Part Inventory

Perhaps you entered a part by mistake or the part is no longer available or used. When you delete a part from inventory, it is no longer available when creating part transactions and when creating work orders. Deleting a part also affects the current total supply on hand. The total count subtracts the part from all locations where the part resides.

To delete a part from the part inventory

1. In V360 Administration, click the **Part Inventory** main link. If you are using the default settings, this appears on the main console as a hyperlink name.

Accela Civic Platform - Asset displays the list of all parts in the parts inventory.

	Part Number	Part Type	Part Brand	Part Description	Part Status
<input type="checkbox"/>	123	Meters	Delco	Meter	Active
<input type="checkbox"/>	5.33	Fittings	Delco	Brake Lin...	Active
<input type="checkbox"/>	5.34	Fittings	Delco	Lug Nuts	Active
<input type="checkbox"/>	4.55	Fittings	Delco	1 Ton - A...	Active
<input type="checkbox"/>	5.43	Pipe Tools	Jennigs	3/4" Pipe	Active

2. Select each part from the parts inventory that you want to dissociate.
3. Click **Delete** on the toolbar.

Accela Civic Platform - Asset displays a message indicating record(s) deleted successfully.

Managing Part Locations

You can define one or more locations for storing parts. Identifying part locations is helpful when trying to locate and assign parts to work orders. In addition, each location maintains a current count of quantity on hand for each part. This section includes the process for maintaining the part locations for the part inventory.

Topics

- [Adding a New Part Location](#)
- [Editing a Part Location](#)
- [Searching for a Part Location](#)
- [Deleting a Part Location](#)

Adding a New Part Location

Adding part locations is necessary to track parts. Each part location maintains a current total supply on hand for each part. Civic Platform uses the part supply when locating parts for work orders, re-orders, and transferring of parts from locations. When you add a location, it is available for reference and association with specific parts within the parts inventory.

To add a new part location

1. Access the Part Location portlet ([Navigating to the Setup Portlet](#)).
Accela Civic Platform - Asset displays a list of all existing part locations.
2. Click **New**.
Accela Civic Platform - Asset displays the part location details portlet.
3. Enter the Location Name.
4. Complete any of the fields that display.
For a list of field descriptions, see [Table 195: Part Location Detail](#).
5. Click **Submit**.

Editing a Part Location

Use the following procedure to edit a part location if the contact or location changes. If the contact for the location changes, find the location using the search, and then modify the contact name, phone number, or its location to reflect the current information.

To edit a part location

1. Access the Part Location portlet ([Navigating to the Setup Portlet](#)).
Accela Civic Platform - Asset displays a list of all existing part locations.
2. Open the part location that you want to review and edit.
Accela Civic Platform - Asset displays the part location details portlet.

The screenshot shows a software interface for managing part locations. At the top, there are buttons for 'Menu', 'Save', 'Reset', and 'Help'. Below these are several input fields and dropdown menus:

- Location Name:** Pump Station #1
- Location Type:** Warehouse (selected)
- Address1:** 3200 W Southlake Blvd.
- City:** (empty field)
- Contact First Name:** (empty field)
- Business Name:** (empty field)
- Comments:** (empty scrollable text area)
- Record Status:** Active

Other fields include: Address2, Zip, Contact Last Name, Fax, and State (dropdown menu showing 'Select').

3. Update any of the fields that display. For a list of field descriptions, see [Table 195: Part Location Detail](#).
4. Click **Submit**.

Table 195: Part Location Detail

Address 1	Enter the first address of the location.
Address 2	Enter the second address of the location.
Business	Enter the business name for the location.
City	Enter the name of the city for the location.
Comments	Enter any comments about the location.
Contact First Name	Enter the first name of the contact for the location.
Contact Last Name	Enter the last name of the contact for the location.
Contact Title	Enter the title of the contact for the location.
Fax	Enter the fax number for the location.
Location Name	Enter the name of the location.
Location Type	Use the drop-down field to select the location type. Example: Warehouse, Store Room, Equipment.
Phone	Enter the contact phone number for the location.
State	Use the drop-down field for the name of the state for the location.
Zip Code	Enter the zip code for the location.

Searching for a Part Location

Some agencies have multiple locations. When looking for a location, enter the information that you have on the location in to the search to limit the results.

For example, if you are looking for a part location in your city, enter the city in your search criteria along with any other information you want to use to filter the results. The search result provides you with all of the locations in the specified city.

To search for a part location

1. Access the Part Location portlet ([Navigating to the Setup Portlet](#)).

Accela Civic Platform - Asset displays a list of all existing part locations.

2. Click **Search**.

Accela Civic Platform - Asset displays the fields that apply to the part location.

The screenshot shows the 'Part Location' portlet within the Accela Civic Platform - Asset. The interface is a standard web-based form with various input fields and dropdown menus. At the top, there's a toolbar with buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. The main area contains several groups of fields: 'Location Name' (text box), 'Address1' (text box), 'Location Type' (dropdown menu), 'City' (text box), 'State' (dropdown menu); 'Zip' (text box), 'Contact First Name' (text box), 'Contact Title' (dropdown menu), 'Contact Last Name' (text box), 'Business Name' (text box), 'Phone' (text box); 'Fax' (text box), 'Comments' (text area), and 'Record Status' (dropdown menu). The 'Record Status' dropdown is currently set to 'Active'.

3. Enter the Part Location Name if you have it. If you do not have the Part Location Name, enter the Part Location Address or City.
4. Complete any of the fields that display.
5. Click **Submit**.

Accela Civic Platform - Asset returns a list of all locations that match your search parameters.

Deleting a Part Location

Perhaps you entered a location by mistake or it is no longer available for use. When you delete a part location, it is no longer be available when agency users create parts or associate parts with work orders.

You can delete a part location you have never used. You can also delete a part location that does not have any stored parts, which includes reserved parts and the quantity on hand. If a part location has any reserved parts or if the part quantity is greater than zero, you cannot delete the part location.

For instructions on how to modify the number of reserved parts and part quantities, see the "Part Inventory" chapter in the Accela Civic Platform User Guide.

To delete a part location

1. Access the Part Location portlet ([Navigating to the Setup Portlet](#)).
Accela Civic Platform - Asset displays a list of all existing part locations.
2. Select each part location that you want to dissociate.
3. Click **Delete** on the toolbar.
Accela Civic Platform - Asset displays a message indicating records deleted successfully.

Managing Part Contacts

Part contacts are vendors and manufacturers your agency has approved to supply the agency with specific parts. You can link one or more contacts to parts and reference them for questions on pricing, orders, defects, and use of the parts they supply. This section describes the process for maintaining the part contacts for the part inventory.

Topics

- [Adding a New Part Contact](#)
- [Editing a Part Contact](#)

- Searching for a Part Contact
- Deleting a Part Contact

Adding a New Part Contact

Part contacts are vendors that your agency has approved to supply parts your agency uses regularly. After you add a contact you can associate it with specific parts, and then reference it for questions on pricing, re-orders, defects, and use of parts they supply.

To add a new part contact

1. Access the Part Contact portlet ([Navigating to the Setup Portlet](#)).

Accela Civic Platform - Asset displays a list of all existing part contacts.

Contact Flag	Contact Type	Business Name	Contact Title	Contact First Name	Contact Middle Name	Contact Last Name	Phone
<input type="checkbox"/>	Manufacturer	Building	nikol_	test	snithy	lowm	cindy (+1)08061180
<input type="checkbox"/>	Manufacturer	Applicant	apy_	track	smith	wood	lise (+1)0806123
<input type="checkbox"/>	Manufacturer	Owner	nical_	nicole test	smidy	lahn	comtoe (+1)0806290
<input type="checkbox"/>	Vendor	Owner	nokal_	check	rita	wood	cmdi (+1)08061180
<input type="checkbox"/>	Manufacturer	Applicant	ava_	track	ryta	lyn	lizzie (+1)08061123
<input type="checkbox"/>	Manufacturer	Owner	nadech_	test	riode	lumm	wendy (+1)08061180
<input type="checkbox"/>	Vendor	Building	nycole_	nicole test	smith	weety	winty (+1)0806002

2. Click **New**.

Accela Civic Platform - Asset displays the part contact details in the detail portlet.

3. Select the Contact Flag, then enter the Contact Business Name.

4. Complete any of the fields that display.

For a list of field descriptions, see [Table 196: Part Contact Detail](#).

5. Click **Submit**.

Editing a Part Contact

Use the following procedure to edit a part contact when a manufacturer's contact information changes. Simply find the information and modify the name and the phone number to reflect the current information.

To edit a part contact

1. Access the Part Contact portlet ([Navigating to the Setup Portlet](#)).
Accela Civic Platform - Asset displays a list of all existing part contacts.
2. Open the part contact that you want to review and edit.
Accela Civic Platform - Asset displays the part contact details portlet.
3. Update any of the fields that display.
For a list of field descriptions, see [Table 196: Part Contact Detail](#).
4. Click **Submit**.

Table 196: Part Contact Detail

Address 1	Enter the first address for the contact.
Address 2	Enter the second address for the contact.
Business Name	Enter the business name for the contact.
City	Enter the name of the city for the contact.
Comments	Enter any comments about the contact.
Contact Flag	Use the drop-down field to select the contact flag: Manufacturer or Vendor.
Contact Last Name	Enter the last name of the contact.
Contact Middle Name	Enter the middle name of the contact.
Contact Title	Enter the title of the contact.
Contact Type	Use the drop-down field to select the contact type.
Email	Enter the email address for the contact.
Fax	Enter the fax number for the contact.
Phone	Enter the phone number for the contact.
State	Enter the name of the state for the contact.
Terms	Enter any terms associated with contact arrangement.
Zip Code	Enter the zip code for the contact.

Searching for a Part Contact

An agency can have many part contacts which supply many parts. If you are looking for a phone number for a contact and you have the business name, enter the name into your search criteria along with any other information you have. The search result provides you with all of the contacts with the same business name.

To search for a part contact

1. Access the Part Contact portlet ([Navigating to the Setup Portlet](#)).
Accela Civic Platform - Asset displays a list of all existing part contacts.

Administration								
Part Contact								
<input type="button" value="Menu"/> <input type="button" value="Search"/> <input type="button" value="New"/> <input type="button" value="Delete"/> <input type="button" value="Help"/>								
<input type="button" value=""/> <input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/>								
Contact Flag	Contact Type	Business Name	Contact Title	Contact First Name	Contact Middle Name	Contact Last Name	Phone	
<input checked="" type="checkbox"/>	Manufacturer Building	nikol	test	snithy	lowm	cindy	(+1)08061180	
<input type="checkbox"/>	Manufacturer Applicant	apy	track	smith	wood	lise	(+1)0806123	
<input type="checkbox"/>	Manufacturer Owner	nical	nicole test	smidy	lahn	comtoe	(+1)0806290	
<input type="checkbox"/>	Vendor Owner	nokal	check	rita	wood	cmdi	(+1)08061180	
<input type="checkbox"/>	Manufacturer Applicant	ava	track	ryta	lyn	lizzie	(+1)08061123	
<input type="checkbox"/>	Manufacturer Owner	nadech	test	riode	lumm	wendy	(+1)08061180	
<input type="checkbox"/>	Vendor Building	nycote	nicole test	smith	weety	winty	(+1)0806002	

2. Click Search.

Accela Civic Platform - Asset displays the fields that apply to the part contact.

Administration								
Part Contact								
<input type="button" value="Menu"/> <input type="button" value="Submit"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>								
Contact Flag <input type="button" value="--Select--"/>	Contact Type <input type="button" value="--Select--"/>	Business Name <input type="text"/>						
Contact Title <input type="text"/>	Contact First Name <input type="text"/>	Contact Middle Name <input type="text"/>						
Contact Last Name <input type="text"/>	Phone (+ <input type="text"/>) <input type="text"/> (Country) Area code & Number	Fax (+ <input type="text"/>) <input type="text"/> (Country) Area code & Number						
E-mail <input type="text"/>	Address1 <input type="text"/>	Address2 <input type="text"/>						
City <input type="text"/>	State <input type="button" value="--Select--"/>	Zip <input type="text"/>						
Terms <input type="text"/>	Comments <input type="text"/>	Record Status <input type="button" value="Active"/>						

3. Enter the Part Contact Business Name if you have it. If you do not have the Business Name, enter the Part Contact Address or City.

4. Complete any of the fields that display.

5. Click **Submit**.

Accela Civic Platform - Asset returns a list of all contacts that match your search parameters.

Deleting a Part Contact

Perhaps you entered a contact by mistake or it is no longer available or used. When you delete a part contact, it is no longer available for reference within the part inventory.

To delete a part contact

1. Access the Part Contact portlet ([Navigating to the Setup Portlet](#)).

Accela Civic Platform - Asset displays a list of all existing part contacts.

2. Select each part contact that you want to dissociate.

3. Click **Delete** on the toolbar.

Accela Civic Platform - Asset displays a message indicating record(s) deleted successfully.

Configuring Work Order Templates

You can configure work order templates that streamline the work order process. The data entry process for entering work orders can be repetitive and time consuming. Civic Platform provides a way to automate the process by creating templates that enable you to pre-populate fields in a work order. You can define one or more templates and specify the exact data to enter automatically when creating a new work order. In addition to basic work order type, priority, and assignment information, you can also associate costing information with the template, which speeds the process and improves user efficiency.

Click a topic title below for full details.

Related Information

[Managing Work Order Templates](#)

[Managing Work Order Tasks](#)

[Managing Cost Groups](#)

[Managing Work Order Costing](#)

Managing Work Order Templates

Topics

- [Creating a Work Order Template](#)
- [Searching for a Work Order Template](#)
- [Editing a Work Order Template](#)
- [Deleting a Work Order Template](#)
- [Managing Cost Items within a Work Order Template](#)
- [Managing Work Order Template Parts](#)
- [Managing Work Order Tasks through a Work Order Template](#)

Creating a Work Order Template

Use work order templates to pre-populate fields in a work order. Define and create work order templates for specific work orders that you generate regularly. Use templates to eliminate repetitive and time consuming data entry. The work order basic data that populates from a template are fields such as type, priority, and assignment information. For information on creating work orders using a work order template, see "Work Orders" in the *Accela Civic Platform User Guide*. In addition to basic information, you can also associate costing, parts, and tasks with a work order template. For information on how to link cost items, parts, and tasks to a work order, see [Managing Work Order Costing](#), [Managing Work Order Template Parts](#), and [Managing Work Order Tasks](#).

To create a work order template

1. Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).
 2. Click **New**.
- Civic Platform displays the work order template details in the Work Order Template tab.

The screenshot shows the 'Work Order Template Detail' page. At the top, there are buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. Below these are tabs for 'Work Order Template Detail', 'Costing', 'Part', and 'Work Order Task'. The main form area contains the following fields:

- Work Order Template Name:** A text input field.
- Work Order Type:** A dropdown menu with four sub-fields: Group (~Select~), Type (~Select~), Subtype (~Select~), and Category (~Select~).
- Description:** A large text area for entering a description.
- Work Order Priority:** A dropdown menu (~Select~).
- Assigned to Department:** A dropdown menu showing 'Current Department'.
- Assigned to Staff:** A dropdown menu showing 'Current User'.
- Comments:** A text area with a dropdown menu (~Select~) and a sub-field 'Primary' (~Select~).

3. Enter the Work Order Template Name. Civic Platform uses this name to identify the work order template when creating new work orders.
4. Enter the Work Order Type, Priority and Assignment. Civic Platform uses these fields to pre-populate the work order when selected.

**Note:**

The type data for a template is a combination of four fields: Group, Type, Subtype, and Category. Each field is dependant upon the next. When you select group from the work order type drop-down list, a drop-down list populates and the type displays. When you select the type, a drop-down list populates and the subtype displays. When you select the subtype, a drop-down list populates and the category displays. The data that you select from the drop-down lists pre-populates work orders when using this template.

5. Complete any other fields that display.

For a list of field descriptions, see [Table 197: Work Order Template Definitions](#).

6. Click **Submit**.

Civic Platform displays the list of work order templates including the template just created in the tab.

Searching for a Work Order Template

The best way to search for a work order template is to perform a search for the work order template name. The name of the template displays in the work order template drop-down list you see when creating a new work order. If you do not have the work order name, the work order type group, type, subtype, or category are other useful fields to use to limit your search results.

To search for a work order template

1. Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).

2. Click **Search**.

Civic Platform displays the fields that apply to the work order template.

The screenshot shows the 'Work Order Template Detail' page. At the top, there are buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. Below these are tabs for 'Work Order Template Detail', 'Costing', 'Part', and 'Work Order Task'. The main form area contains the following fields:

- Work Order Template Name:** A text input field.
- Work Order Type:** A dropdown menu with four sub-fields: Group (~Select~), Type (~Select~), Subtype (~Select~), and Category (~Select~).
- Description:** A large text area for entering a description.
- Work Order Priority:** A dropdown menu (~Select~).
- Assigned to Department:** A dropdown menu showing 'Current Department'.
- Assigned to Staff:** A dropdown menu showing 'Current User'.
- Comments:** A text area with a dropdown menu (~Select~) and a sub-field 'Record Status' (~Select~).
- Primary:** A dropdown menu (~Select~).

3. Enter the Work Order Template Name. If you do not have the name, enter the Type, Group, Subtype, and/or Category.
4. Complete any other relevant search fields.
5. Click **Submit**.

Civic Platform returns a list of work order templates that match your search parameters.

Editing a Work Order Template

Use the following procedure to update a work order template. For example, the work order priority might change for a specific type of work order. In this case, identify the work order template that defines the incorrect priority and modify the template details to reflect the new priority. When you update a work order template, the new information pre-populates new work orders you generate with that template. This update does not affect work orders created with the template prior to the update.

To edit a work order template

1. Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).
2. Open the work order template that you want to review and edit by selecting the link on the work order template name.

Civic Platform displays the work order template details on the tabs.

The screenshot shows the 'Work Order Template Detail' page. At the top, there's a header bar with 'Template Name: EQUIPMENT MAINT.' and buttons for 'Menu', 'Save', 'Reset', and 'Help'. Below the header are three tabs: 'Work Order Template Detail' (selected), 'Costing (0)', and 'Part (0)'. Under the main content area, there are several input fields:

- Work Order Template Name ***: A text input field containing 'EQUIPMENT MAINT.'
- Work Order Type ***: A dropdown menu with columns for 'Group' (AMS), 'Type' (Equipment), 'Subtype' (Equipment Maintenance), and 'Category' (Maintenance).
- Assigned to Department**: A dropdown menu showing 'Current Department' (FIRE - EMER) and a list item 'FIRE - EMER'.
- Assigned to Staff**: A dropdown menu showing 'Current User' (Bob Hose) and a list item 'Bob Hose'.
- Comments**: A rich text editor with a 'check spelling' button.
- Description**: A rich text editor with a 'check spelling' button.
- Primary**: A dropdown menu showing 'Yes'.
- Work Order Priority**: A dropdown menu showing '2 - Critical'.
- Record Status**: A dropdown menu showing 'Active'.

3. Update any of the fields that display.

For a list of field descriptions, see [Table 197: Work Order Template Definitions](#).

4. Click **Submit**.

Table 197: Work Order Template Definitions

Assigned to Department	Select the department assigned to the work order. This field pre-populates the Assigned to Department field on the work order when creating a work order using the work order template.
Assigned to Staff	Select the staff member assigned to the work order. This field pre-populates the Assigned to Staff field on the work order when creating a work order using the work order template.
Comments	Enter any comments associated with the work order template.
Description	Enter the description associated with the work order template.

Primary	Use the drop-down list to set the work order template to be the primary one for the associated record type. When you create a work order, the basic work order information defined in the primary template automatically populates into the Assigned to Department, Assigned to Staff, Description, Work Order Type and Priority fields on the work order form. When the work order is submitted, the cost items, parts, and work order tasks within the primary template automatically associate with the work order, and they display under the corresponding tab.
Record Status	Record Status is a read-only field that indicates if a work order template is Active or Inactive. The record status is always Active, unless you delete the template.
Work Order Priority	Select the priority of the work order. This field pre-populates the Work Order Priority field on the work order when creating a work order using the work order template.
Work Order Template Name	Enter the name of the template created for the work order. Civic Platform uses this name to identify the template when creating a new work order.
Work Order Type	<p>This field is a combination of four fields: Group, Type, Subtype, and Category. Each field is dependant upon the next. Select the work order type group. When you select the group, the type drop-down list displays. Select the type. When you select the type, the subtype drop-down list displays. Select the subtype. When you select the subtype, the category drop-down list displays. Select the category.</p> <p>Civic Platform uses these fields to pre-populate the work order group, type, subtype, and category when a user creates a work order using the work order template.</p>

Deleting a Work Order Template

If you enter a work order template by mistake, or if you no longer need it, you can delete it. When you delete a work order template, it is no longer available for use when creating new work orders. Work orders previously created using the template remain the same.

To delete a work order template

1. Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).
 2. Select each work order template that you want to remove.
 3. Click **Delete** on the toolbar.
- Civic Platform displays a message indicating record(s) deleted successfully.

Managing Cost Items within a Work Order Template

Topics

- [Linking a Cost Item to a Work Order Template](#)
- [Editing Work Order Template Costing](#)
- [Deleting a Work Order Template Cost Item](#)

Linking a Cost Item to a Work Order Template

You create and maintain the costing information you associate with work orders and work order templates in the cost item definition portlet. For information on how to add cost items, see [Managing Work Order Costing](#).

To link a cost item to a work order template

1. Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).

2. Open the work order template you want to add costing to.
Civic Platform displays details for the work order template.

3. Click the **Costing** tab.

Civic Platform displays the list of costs associated with the work order template.

Template Name: ELENA-TEMPLATE

Menu ▾ Look Up Delete Help

Work Order Template Detail		Costing (3)		Part (0)		Work Order Task (1)			
<u>Cost Type</u>	<u>Cost Item</u>	<u>Quantity</u>	<u>Unit of Measure</u>	<u>Unit Rate</u>	<u>Cost Account</u>	<u>Description</u>	<u>Cost Subgroup</u>	<u>Fixed Rate</u>	<u>Cost Factor</u>
<input type="checkbox"/> Labor	Elena03	0	AfterHours	\$0.00	BDC			\$0.00	After Reg
<input type="checkbox"/> Part	Elena-Part01	0	Tons	\$0.50	BDC	Description	Cost Subg...	\$50.00	On Call
<input type="checkbox"/> Postage	Elena-02	0	AfterHours	\$1.00	BDC			\$30.00	After Reg

4. Click **Lookup**.

Civic Platform displays the details for the cost item definition.

Template Name: ELENA-TEMPLATE

Menu ▾ Submit Reset Cancel Help

Work Order Template Detail		Costing (3)		Part (0)		Work Order Task (1)	
Cost Type <input type="button" value="--Select--"/>	Cost Item <input type="text"/>	Default Cost Factor <input type="button" value="--Select--"/>					
Fixed Rate <input type="text"/>	Unit Rate <input type="text"/>	Unit of Measure <input type="button" value="--Select--"/>					
Default Cost Account <input type="button" value="--Select--"/>	Cost Subgroup <input type="text"/>	Description <input type="text"/>					
Record Status <input type="button" value="Active"/>							

5. Complete the fields associated with the cost item(s) you are linking to the template.

For a list of field descriptions, see [Table 199: Work Order Cost Item Definitions](#).

6. Click **Submit**.

Civic Platform displays the cost item definition search results.

Template Name: ELENA-TEMPLATE

Menu ▾ Select Look Up Cancel Help

Work Order Template Detail		Costing (3)		Part (0)		Work Order Task (1)	
<u>Cost Type</u>	<u>Cost Item</u>	<u>Fixed Rate</u>	<u>Default Cost Factor</u>	<u>Unit Rate</u>	<u>Unit of Measure</u>		
<input type="checkbox"/> Contractor	154	10	Overtime	10			
<input type="checkbox"/> E_Cost_Type	813				Dollars		
<input type="checkbox"/> E_Cost_Type	859				Dollars		
<input type="checkbox"/> Labor	Elena03	0	After Reg	0	AfterHours		
<input type="checkbox"/> Part	Elena-Part01	50	After Reg	0.5	Tons		
<input type="checkbox"/> Postage	Elena-02	30	After Reg	1	AfterHours		

7. Select each cost item you want to associate with the work order template.

8. Click **Submit**.

Civic Platform creates an association for each cost item, and then displays the work order template costing list.

Editing Work Order Template Costing

This procedure describes how to edit the costing associated with a work order template. When editing work order template costing information, some of the cost item definition fields are read-only, such as cost type

and cost item. If you need to update any of the read-only fields, go to the Work Order Cost Item Definition list portlet. For more information on how to do this, see [Managing Work Order Costing](#).

To edit a work order template costing

1. Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).
2. Open the work order template you want edit.
Civic Platform displays details for the work order template.
3. Click the **Costing** tab.
Civic Platform displays the list of costing associated with the work order template.

Template Name: ELENA-TEMPLATE									
Work Order Template Detail		Costing (3)		Part (0)		Work Order Task (1)			
Cost Type	Cost Item	Quantity	Unit of Measure	Unit Rate	Cost Account	Description	Cost Subgroup	Fixed Rate	Cost Factor
<input type="checkbox"/> Labor	Elena03	0	AfterHours	\$0.00	BDC			\$0.00	After Reg
<input type="checkbox"/> Part	Elena-Part01	0	Tons	\$0.50	BDC	Description	Cost Subg...	\$50.00	On Call
<input type="checkbox"/> Postage	Elena-02	0	AfterHours	\$1.00	BDC			\$30.00	After Reg

4. Open the cost item that you want to review and edit.
Civic Platform displays the cost item details on the tabs.

Template Name: ELENA-TEMPLATE									
Work Order Template Detail		Costing (3)		Part (0)		Work Order Task (1)			
Cost Type	Labor	Cost Item	Elena03	Quantity	<input type="text" value="0"/>	Cost Account	<input type="text" value="BDC"/>	Cost Factor	
Unit of Measure	AfterHours	Unit Rate	<input type="text" value="0"/>	Fixed Rate	<input type="text" value="0"/>	Cost Subgroup	<input type="text" value=""/>	Cost Factor	
Description	<input type="text" value=""/>	Work Order Template Name	ELENA-TEMPLATE	Cost Factor	<input type="text" value="Regular"/>	Cost Factor	<input type="text" value=""/>	Cost Factor	

5. Update any of the fields that display and are editable.
For a list of field descriptions, see [Table 199: Work Order Cost Item Definitions](#).
6. Click **Save**.

Deleting a Work Order Template Cost Item

If you enter a cost item by mistake, or if you no longer need it, you can delete it. When you delete a work order template cost item, you remove the association between the work order template and the cost item. The cost item definition is still available when creating work orders and associating costing with other work order templates.

To delete a work order template cost item

1. Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).
2. Open the work order template you want edit.
Civic Platform displays details for the work order template.
3. Click the **Costing** tab.
Civic Platform displays the list of costing associated with the work order template.
4. Select each cost item that you want to dissociate.

5. Click Delete on the toolbar.

Civic Platform displays a message indicating record(s) deleted successfully.

Managing Work Order Template Parts

Topics

- [Linking a Part to a Work Order Template](#)
- [Editing Work Order Template Costing](#)
- [Deleting a Work Order Template Cost Item](#)

Linking a Part to a Work Order Template

Linking parts to a work order template can eliminate user error and can limit the repetitive and time consuming data entry process of creating work orders. Your agency can define one or more templates and specify the parts to use for specific types of work orders. There are two steps to linking a part to a work order template. You must first find the parts using the lookup and you can then associate one or more parts with the work order template.

The can create and maintain parts and associate them with work orders and work order templates in the parts inventory portlet. See [Setting Up a Parts Inventory](#) for more information on working with parts.

When you create a work order using a work order template, a parts ISSUE transaction generates for each part. Use these parts transactions to track the usage of the parts and update the current supply on hand for the part and the location of the part. See [Setting Up a Parts Inventory](#) for more information on part transactions.

To link a part to a work order template

1. Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).

2. Open the work order template you want to add parts to.

Civic Platform displays details for the work order template.

3. Click the **Parts** tab.

Civic Platform displays the list of parts associated with the work order template.

Template Name: WATER HYDRANT MAINTENANCE						
Menu		Look Up	Delete	Help		
		Work Order Template Detail		Costing (0)	Part (3)	Work Order Task (0)
Part Number	Location Name	Quantity	Comments	Record Status	Updated Date	Updated By
<input type="checkbox"/> R2-1	Water Shop	2.0000		Active	03/19/2013	ADMIN
<input type="checkbox"/> Sand-Cushion	Operations Yard	4.0000		Active	03/19/2013	ADMIN
<input type="checkbox"/> Top Soil	Operations Yard	1.0000		Active	03/19/2013	ADMIN

4. Click **Look Up**

Civic Platform displays the fields associated with the part.

Template Name: WATER HYDRANT MAINTENANCE

Menu ▾ Submit Reset Cancel Help

Work Order Template Detail Costing (0) Part (3) Work Order Task (0)

Part Number	Part Type	Part Brand
<input type="text"/>	--Select--	<input type="text"/>
Part Description	Part Status	Unit Cost
<input type="text"/>	--Select--	From <input type="text"/> To <input type="text"/>
Unit of Measure	Taxable	Total Supply
--Select--	--Select--	From <input type="text"/> To <input type="text"/>
Maximum Quantity	Minimum Quantity	Reorder Quantity
From <input type="text"/> To <input type="text"/>	From <input type="text"/> To <input type="text"/>	From <input type="text"/> To <input type="text"/>
Reorder Due	Calculate Type	Comments
--Select--	--Select--	<input type="text"/>
Record Status	Reserved Quantity	Hard Reserve
Active	From <input type="text"/> To <input type="text"/>	From <input type="text"/> To <input type="text"/>
Original Part ID	Track Cost by Location	
	--Select--	

5. Complete the fields that display to link the part(s) to the template.

For a list of field descriptions, see [Setting Up a Parts Inventory](#).

6. Click **Submit**.

Civic Platform displays the part search results.

Template Name: WATER HYDRANT MAINTENANCE

Menu ▾ Select Look Up Cancel Help

Work Order Template Detail Costing (0) Part (3) Work Order Task (0)

Part Number	Unit of Measure	Calculate Type	Part Type	Part Brand	Part Description	Part Status
R1-1	Each	Simple	Traffic C...		STOP 30" X 30"	Active
R1-2	Each	Simple	Traffic C...		YIELD 36" X 36"	Active
R2-1	Each	Simple	School Zo...		24" X 30"	Active
DFW #16 AMR SB	Each	Simple	Meter Boxes		Single Plastic Meter Box	Active
6" PVC	Feet	Simple	Pipe		6" PVC Water Pipe, C-900	Active
BBA4-43	Each	Simple	Brass Fit...		1" x 3/4" Bushing for CC thread	Active
B44-333WG	Each	Simple	Brass Fit...		3/4" Curb Stop Comp X Comp	Active
C14-33G	Each	Simple	Brass Fit...		3/4" FIP Iron Pipe X Comp Adapter	Active
Sand-Cushion	Yard	Simple	Bulk Mate...			
Top Soil	Yard	Simple	Bulk Mate...			

7. Select each part you want to associate with the work order template.

8. Click **Save**.

Civic Platform creates an association for each part selected with the work order template and displays the work order template part list.

Editing Work Order Template Parts

Use the following procedure to edit a part in a work order template. However, certain part fields are read-only. If you need to update any of the read-only fields, go to the Parts Inventory portlet. For more information on editing parts, see [Setting Up a Parts Inventory](#).

To edit a work order template part

- Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).

- Open the work order template you want edit.

Civic Platform displays details for the work order template.

3. Click the **Parts** tab.
Civic Platform displays the list of parts associated with the work order template.
4. Open the part that you want to review and edit.
Civic Platform displays the part details on the tabs.
5. Update any of the fields that display and are editable.
For a list of field descriptions, see [Setting Up a Parts Inventory](#).
6. Click **Save**.

Deleting a Work Order Template Part

If you enter a part by mistake, or if you no longer use a part with a template, you can delete it. When you delete a work order template part, you remove the association between the work order template and the part. The part is still available in the parts inventory and used when creating work orders and associating parts with other work order templates.

To delete a work order template part

1. Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).
2. Open the work order template you want edit.
Civic Platform displays details for the work order template.
3. Click the **Parts** tab.
Civic Platform displays the list of parts associated with the work order template.
4. Select each part that you want to dissociate.
5. Click **Delete** on the toolbar.
Civic Platform displays a message indicating record(s) deleted successfully.

Managing Work Order Tasks through a Work Order Template

Users can create new work order tasks to attach to the work order template, attach existing tasks to the template, and edit the task to fit the needs of the template. For more information on work order templates, see [Creating a Work Order Template](#).

Topics

- [Creating a New Work Order Task from a Work Order Template](#)
- [Attaching Existing Work Order Tasks to a Work Order Template](#)
- [Editing a Work Order Task Associated with a Template](#)
- [Deleting a Work Order Task from a Work Order Template](#)

Creating a New Work Order Task from a Work Order Template

Users can create a new work order task through the work order template. This not only associates the new work order task with the template, but adds the new task to the Master Work Order list, which you can use with other templates.

To create a new work order task attached to a work order template

1. Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).

2. Open the work order template that you want to review and edit by selecting the link on the work order template name.

Civic Platform displays the work order template details on the tabs.

Template Name: WATER HYDRANT MAINTENANCE

Work Order Template Name: WATER HYDRANT MAINTENANCE

Work Order Type:

Group: AMS	Type: Water	Subtype: Fire Hydrants	Category: Repair
------------	-------------	------------------------	------------------

Work Order Priority: Low

Assigned to Department: Water

Current Department: Assigned to Staff Current User: -Select-

Location:

Description:

3. Click the Work Order Task tab.

Civic Platform displays a list of all related work order tasks.

Task Code	Description	Standard Operating Procedures	Estimate	Order	Workflow Task
553	232	436	887.00	0	
Inspect B...				0	

4. Click **New**.

Civic Platform displays the work order task details in the tab.

Template Name: WATER HYDRANT MAINTENANCE

Task Code:

Description:

Default Standard Operating Procedures:

Default Estimate:

Duration Unit: -Select-

Effective Date:

Expire Date:

Comments:

Workflow Task: --Select--

Order:

Workflow Task Status: --Select--

5. Enter the Task Code.

6. Update any other fields that display.

For a list of field descriptions, see [Table 198: Work Order Task Fields](#).

7. Click **Submit**.

Attaching Existing Work Order Tasks to a Work Order Template

Linking existing work order tasks to a work order template can eliminate user error and can limit the repetitive and time consuming data entry process of creating work orders. Your agency can define one or more templates and specify the tasks required for specific types of work orders. The user can then add details to the task to make it more applicable to the work order template. For example, a work order task

described as "Oil Change" can apply to templates for several types of vehicles, but the process might be different for each.

The work order tasks that you can associate with the work order templates, which you create and maintain in the work order tasks portlet.

To attach existing work order tasks to a work order template:

1. Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).
2. Open the work order template that you want to review and edit by selecting the link on the work order template name.

Civic Platform displays the work order template details on the tabs.

3. Click the Work Order Task tab.

Civic Platform displays a list of the work order tasks associated with the template.

<input type="checkbox"/> Task Code	Description	Standard Operating Procedures	Estimate	Order	Workflow Task
<input type="checkbox"/> 553	232	436	887.00	0	
<input type="checkbox"/> Inspect B...				0	

4. Click **Look Up**.

Civic Platform displays the add work order task form.

Task Code <input type="text"/>	Description <input type="text"/>	Default Standard Operating Procedures <input type="text"/>
Default Estimate <input type="text"/>	Duration Unit --Select--	Effective Date From <input type="text"/> To <input type="text"/>
Record Status Active	Expiration Date From <input type="text"/> To <input type="text"/>	

5. Enter the Work Order Task code and any other fields that display. For a list of field descriptions, see [Table 198: Work Order Task Fields](#).

6. Click **Submit**.

Civic Platform displays a list of Work Order Tasks that match the search criteria.

Template Name: WATER HYDRANT MAINTENANCE

Menu Select Look Up Cancel Help

Work Order Template Detail Costing (0) Part (3) Work Order Task (2)

Task Code	Description	Default Standard Operating Procedures	Default Estimate	Order
553	232	436	887	-Select-
Check Fluid				-Select-
Inspect B...				-Select-
Lubricate...				-Select-
Oil Change				-Select-

7. Select the Task Code(s) that you want to add to the template.
8. Update any other fields that display.

For a list of field descriptions, see [Table 198: Work Order Task Fields](#).

9. Click **Select**.

Editing a Work Order Task Associated with a Template

Use the following procedure to edit a work order task. You might need to do this, for example, to make it more specific to the work order template. When editing work order template task information, some of the task definition fields, such as the task code, are read-only. If you want to change the read-only fields, you must create a new task definition.

To edit a work order task associated with a template

1. Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).
2. Open the work order template that you want to review and edit by selecting the link on the work order template name.

Civic Platform displays the work order template details on the tabs.

Template Name: WATER HYDRANT MAINTENANCE

Menu Save Reset Help

Work Order Template Detail Costing (0) Part (3) Work Order Task (0)

Work Order Template Name *	WATER HYDRANT MAINTENANCE	Work Order Type *	
		Group AMS	
		Type Water	
		Subtype Fire Hydrants	
		Category Repair	
Work Order Priority	Assigned to Department	Current Department	Assigned to Staff Current User
Low	Water		-Select-
Location	Description		

3. Click the Work Order Task tab.

Civic Platform displays a list of all related work order tasks.

Template Name: WATER HYDRANT MAINTENANCE

Menu New Look Up Delete Help

Work Order Template Detail Costing (0) Part (3) Work Order Task (2)

Task Code	Description	Standard Operating Procedures	Estimate	Order	Workflow Task
<input type="checkbox"/> 553	232	436	887.00	0	
<input type="checkbox"/> Inspect B...				0	

- Open the work order task that you want to review and edit by selecting the link on the work order task name.

Civic Platform displays the work order task details.

Template Name: WATER HYDRANT MAINTENANCE

Menu Save Reset Cancel Help

Work Order Template Detail Costing (0) Part (3) Work Order Task (2)

Task Code Inspect Brakes	Description <input type="text"/>	Standard Operating Procedures <input type="text"/>
Estimate <input type="text"/>	Duration Unit --Select--	Order 0
Workflow Task --Select--	Workflow Task Status --Select--	Comments <input type="text"/>
		Record Status Active

- Update any fields that display.

For a list of field descriptions, see [Table 198: Work Order Task Fields](#).



Note:

If you assigned the work order task to a workflow task, the workflow task status must be Complete before you can complete the work order task. When a work order task is complete, the task displays in green to users of Civic Platform.

- To reset fields to the default value, click the Reset button.

- Click **Submit**.

Deleting a Work Order Task from a Work Order Template

If you enter a task by mistake, or if you no longer use a task with a template, you can delete it. When you delete a work order task, you remove the association between the template and the task. The task is still available in the task inventory and you can use it when creating work orders and associating tasks with other work order templates.

To delete a work order task from a work order template

- Access the Work Order Template portlet ([Navigating to the Setup Portlet](#)).

- Open the work order template that has the task that you want to delete.

Civic Platform displays the work order template details in the tab.

Template Name: WATER HYDRANT MAINTENANCE

Menu Save Reset Help

Work Order Template Detail Costing (0) Part (3) Work Order Task (0)

Work Order Template Name *	Work Order Type *		
WATER HYDRANT MAINTENANCE	Group	Type	Subtype
	AMS	Water	Fire Hydrants
Work Order Priority	Assigned to Department	Current Department	Assigned to Staff Current User
Low	Water	Water	—Select—
Location	Description		

3. Click the Work Order Tasks tab.

Civic Platform displays the list of work order templates in the tab.

Template Name: WATER HYDRANT MAINTENANCE

Menu New Look Up Delete Help

Work Order Template Detail Costing (0) Part (3) Work Order Task (2)

<input type="checkbox"/> Task Code	Description	Standard Operating Procedures	Estimate	Order	Workflow Task
<input type="checkbox"/> 553	232	436	887.00	0	
<input type="checkbox"/> Inspect B...				0	

4. Select the task you want to delete.

5. Click **Delete**.

Managing Work Order Tasks

You can manage work order tasks through the work order form. You might need to do this if the task is relevant for multiple different work order templates. For example, a work order task described as "Oil Change" can apply to templates for several types of vehicles.

Topics

- [Creating a Work Order Task](#)
- [Searching for Work Order Tasks](#)
- [Editing Work Order Tasks](#)
- [Deleting Work Order Tasks](#)
- [Managing Work Order Templates within a Work Order Task](#)
- [Managing Work Order Types](#)

Creating a Work Order Task

A work order task is a step in completing a work order activity. An administrator creates a standard set of work order tasks for users to place in one or many templates. These tasks have little to do with the flow of a work order, but instead become a checklist or set of instructions for the individual or crew performing the work. For this reason, they are adjustable per work order. For example, vehicle needs maintenance. The

technician can create a single work order, and add multiple tasks to the work order, such as changing the oil and inspecting the brakes.

The basic data populates for the task include: Task Code, Description, and Default Standard Operating Procedures. Civic Platform updates this data when you add a task to a work order template.

To create a work order task

- Access the Work Order Task portlet ([Navigating to the Setup Portlet](#)).

- Click New.**

Civic Platform displays the work order task details in the tab.

- Complete the Work Order Task Fields.

For a list of field descriptions, see [Table 198: Work Order Task Fields](#).

- Click Submit.**

Table 198: Work Order Task Fields

Comments	Enter any comments associated with the work order task. These comments default into the Work Order Task when you associate the task with the Work Order Template.
Default Estimate	The anticipated number of units of time, such as 3 weeks, required to complete the task. If you do not check this box when adding the task to a work order template, Civic Platform disables the Duration Unit option.
Description	Enter the description associated with the work order task.
Duration Unit	The anticipated unit of time needed to complete the task, such as day, week, or month. This field works in conjunction with the Default Estimate field. For example, if you do not check the Default Estimate field when adding the task to a work order template, Civic Platform disables this option.
Effective Date	The date the task was first active in the software. Administrators can create tasks ahead of time to prepare for use in Civic Platform. The Effective Date must occur before the Expire Date.
Allow Estimate Change	Choose whether you want to allow changes to the estimate.
Expire Date	The date the task expires. This allows administrators to remove tasks while still maintaining history. The Expire Date selected must occur after the Effective Date.
Order	The order of the task in comparison to the other tasks in the work order. This allows for the tasks to ordered sequentially.
Record Status	Civic Platform sets new work order tasks to Active automatically when created. When you delete a task you set it to an inactive status. To reactivate a task, look up inactive tasks and then select the active status.

Standard Operating Procedures	Enter the established or prescribed method you want users to routinely follow for the performance of the task. For example, "Clean sample tube with brush."
Task Code	The identification code number for a work order task. This is a required field. You cannot assign the same Task Code to two different tasks.
Updated By	The user who last updated the work order task. This field is read-only.
Updated Date	The most current date for the work order task record. This field is read-only.

Searching for Work Order Tasks

You can search for a work order task from the Work Order portlet or from the Work Order Task tab on the Work Order Template portlet. After you have received the filtered search results list you can identify the task you are looking for by clicking the link on the work order task name. For more information on searching for a task from the Work Order Template portlet, see [Attaching Existing Work Order Tasks to a Work Order Template](#).

To search for a work order task definition

1. Access the Work Order Task portlet. Refer to [Navigating to the Setup Portlet](#).
2. Click **Search**.

Civic Platform displays the work order task search form.

3. Enter the work order Task code and any other fields that display.
For a list of field descriptions, see [Table 198: Work Order Task Fields](#).
4. Click **Submit**.

Editing Work Order Tasks

Use the following procedure to edit the default work order task definition fields. For example, if the Effective Date for a task has changed, you can update that field. Editing a work order task definition does not reset the values for tasks that you previously attached to templates and then altered, but your edits are applicable to future templates. All fields except for the Task Code are available for editing. To change the task code, you must create a new work order task definition. Refer to [Creating a Work Order Task](#).

To edit a work order task definition

1. Access the Work Order Task portlet ([Navigating to the Setup Portlet](#)).
2. Open the work order task that you want to edit.
Civic Platform displays the work order task details in the tab.

Template Name: WATER HYDRANT MAINTENANCE

Menu Save Reset Cancel Help

Work Order Template Detail Costing (0) Part (3) Work Order Task (2)

Task Code Inspect Brakes	Description <input type="text"/>	Standard Operating Procedures <input type="text"/>
Estimate <input type="text"/>	Duration Unit --Select--	Order 0
Workflow Task --Select--	Workflow Task Status --Select--	Comments <input type="text"/>
		Record Status Active

3. Update the desired fields.

For a list of field descriptions, see [Table 198: Work Order Task Fields](#).

4. To reset fields to the default value, click the Reset button.

5. Click **Submit**.

Deleting Work Order Tasks

If you enter a work order task by mistake, or if you no longer use the task, you can delete it. When you delete a work order task, it does not display in the Work Order Task list, and you cannot attach the task to a template. Before you delete a task, you must remove any attached work order templates. You cannot delete any work order tasks that you attached to a work order template. For more information on removing attached work order templates from a task, see [Deleting a Work Order Task from a Work Order Template](#).

To delete work order tasks

1. Access the Work Order Task portlet ([Navigating to the Setup Portlet](#)).
2. Select the task you want to delete.
3. Click **Delete**.

Managing Work Order Templates within a Work Order Task

You can associate a task with more than one work order template. Users can view the work order templates related to a task on a separate tab of the work order task form. The tab presents the work order template name, description, task SOP, estimate, comments, task, status, the date you last updated the template, and the user who last updated the template. For example, you can use the task "Oil Change" for several types of vehicle work orders. When the user selects that task, Civic Platform displays all the templates you attached the task to.

Topics

- [Linking a Work Order Template to a Work Order Task](#)
- [Editing a Work Order Task Specific to a Work Order Template](#)
- [Resetting Task Defaults](#)
- [Deleting a Work Order Template from a Work Order Task](#)

Linking a Work Order Template to a Work Order Task

You can link a work order template to a work order task. When you link a work order template to a work order task, Civic Platform adds the work order template to the Work Order Template list. You can associate the same work order template with multiple work orders.

For example, you can associate a work order task named “Oil Change” with templates for several types of vehicles, but the task process for the oil change might be different in each template.

For more information on attaching existing work order tasks to a work order template, see [Attaching Existing Work Order Tasks to a Work Order Template](#).

To link a work order template to a work order task

1. Access the Work Order Task portlet ([Navigating to the Setup Portlet](#)).
2. Open the work order task that you want to view.
Civic Platform displays the work order task details in the tab.
3. Click the Work Order Templates tab.
Civic Platform displays a list of all existing work order task descriptions including the item just recorded.

<input type="checkbox"/> Work Order Template	Description	Standard Operating Procedures	Estimate	Order	Workflow Task	Comments
<input type="checkbox"/>	FLEET 3 M... Change oi...		0.00	0		

4. Click **New**.
Civic Platform displays the Add Template task form.

5. Enter the Work Order Template name, task Standard Operating Procedure, and Estimate completion time.
6. Complete any of the remaining fields that display.
For a list of field descriptions, see [Table 198: Work Order Task Fields](#).
7. Click **Submit**.

Editing a Work Order Task Specific to a Work Order Template

Use the following procedure to edit a work order task to make it more specific to the work order template. When editing work order task information, some of the task definition fields, such as the Task Code, are read-only. If you want to change the read-only fields, you must edit the original task. To edit a new task, see [Editing Work Order Tasks](#).

To use the task form to edit a work order task associated with a work order template

- Find the work order task you want to edit.

For instructions on how to find a work order task, see [Searching for Work Order Tasks](#).

- Click the Work Order Template that you want to update.

Civic Platform displays the Work Order Template form.

- Update the desired fields.

For a list of field descriptions, see [Table 198: Work Order Task Fields](#).



Note:

If you assigned the work order task to a workflow task, you must set the workflow task to Active or Complete before you can complete the work order task. When a work order task is Complete, the task displays in green to users of Civic Platform.

- To reset fields to the default value, click the button.

- Click **Submit**.

Resetting Task Defaults

This procedure describes how to reset the default values for a work order task attached to a template. You might need to do this, for example, if you enter a value that is no longer valid. For example, your agency uses a new type of oil in all vehicles. Instead of having to manually update each task through the work order template, the user can update the SOP in the work order task template. When you reset the values, they automatically update to the values specified in the work order task description.

To reset task defaults

- Access the Work Order Task portlet ([Navigating to the Setup Portlet](#)).

- Click the Work Order Task attached to the template that you want to edit.

Civic Platform displays the Work Order Task Details.

- Click the Work Order Template tab.

Civic Platform displays a list of all attached work order templates.

- Select the Template where you want to reset the task default values.

- Click the Reset Defaults button.

**Note:**

You can also reset the work order task default values within the Work Order Task Detail tab by clicking the Reset button before saving changes made.

Deleting a Work Order Template from a Work Order Task

If you enter a task by mistake, or if you no longer use a task with a template, you can delete it. When you delete a work order template task, Civic Platform removes the association between the work order template and the task. The task is still available in the task inventory and used when creating work orders and associating tasks with other work order templates.

To delete a work order task from a work order template

1. Find the work order task you want to delete from a work order template.
For instructions on how to find a work order task, see [Searching for Work Order Tasks](#).
2. Select the template you want to delete.
3. Click **Delete**.

Managing Work Order Types

When you associate a work order template with a work order task, Civic Platform associates the work order type assigned to the template with the task. For more information on associating a work order template with a work order task, see [Linking a Work Order Template to a Work Order Task](#).

Topics

- [Associating a Work Order Type with a Work Order Task](#)
- [Removing Associations between Work Order Types and Tasks](#)

Associating a Work Order Type with a Work Order Task

You can associate a work order type with a work order task. For example, you might want to associate the work order type for water pump maintenance to all the related work order tasks, such as flow test and oil level check.

To associate a work order type with a work order task

1. Find the work order task to which you want to associate a work order type.
For instructions, see [Searching for Work Order Tasks](#).
2. Click the name of the work order task.
Civic Platform displays the work order task details.

Administration

Work Order Task

Menu Search New Delete Help

Task Code	Description	Default Standard Operating Procedures	Default Estimate	Effective Date	Expiration Date	Updated Date	Updated By	Record Status
553	232	436	887.00	02/12/2013	02/13/2013	01/03/2013	ADMIN	Active
<input type="checkbox"/> Check Fluid					05/20/2008	AMSADMIN	Active	
<input type="checkbox"/> Inspect B...					05/20/2008	AMSADMIN	Active	
<input type="checkbox"/> Lubricate...					05/20/2008	AMSADMIN	Active	
<input checked="" type="checkbox"/> Oil Change					05/20/2008	AMSADMIN	Active	

Task: Oil Change

Menu Save Reset Help

Work Order Task Detail Work Order Template (1) Work Order Types (1)

Task Code Oil Change	Description <input type="text"/>	Default Standard Operating Procedures <input type="text"/>	
Default Estimate <input type="text"/>	Duration Unit --Select--	Effective Date <input type="text"/>	Expiration Date <input type="text"/>
Record Status Active			

3. Click the **Work Order Types** tab.

Civic Platform displays a list of all existing work order types related to the work order task.

Task: Oil Change

Menu Assign Delete Help

Work Order Task Detail Work Order Template (1) Work Order Types (1)

Record Type	Record Type Alias	Updated Date	Updated By	Record Status
AMS/Fleet/PM/NA	AMS/Fleet/PM/NA	02/26/2010	MIGRAION	Active

4. Click **Assign**.

Civic Platform displays the Record Type Select page.

Record Type Tree -- Webpage Dialog

Submit Search Help

Record Type

- AMS
- Building
- Enforce
- Enforcement
- Planning
- ServiceRequest

5. Expand and collapse the navigation tree and select the work order type you want to associate with the selected work order task. Alternatively, you can search for a work order type using the **Search** button.

6. Select the work order type you want to associate with the selected work order task.

7. Click **Submit**.

Civic Platform associates the work order type with the selected work order task and then displays a confirmation message.

The screenshot shows a software interface for managing work order tasks. At the top, there's a toolbar with buttons for 'Menu', 'Assign', 'Delete', and 'Help'. Below the toolbar, there are three tabs: 'Work Order Task Detail' (selected), 'Work Order Template (1)', and 'Work Order Types (2)'. A message '1 record(s) added successfully.' is displayed above a table. The table has columns for 'Record Type', 'Record Type Alias', 'Updated Date', 'Updated By', and 'Record Status'. It contains two rows: one for 'AMS/Fleet/PM/NA' with alias 'AMS/Fleet/PM/NA', updated by 'MIGRAION' on '02/26/2010', and another for 'Building/Commercial/Fi...' with alias 'Commercial Fire Equipment', updated by 'ADMIN' on '03/19/2013', both marked as 'Active'.

Removing Associations between Work Order Types and Tasks

You can remove the association between a work order type and a work order task. For example, you might want to remove work order types from the tasks they no longer relate to, or you might need to correct an error.

When you remove the association between a work order type and a work order task, you do not delete the work order type.

You can also remove the association between a work order template and a work order task. When you remove a template from a task, Civic Platform removes the association between the template's work order type and the work order task.

For more information on removing the association between a work order template and a work order task, see [Deleting a Work Order Template from a Work Order Task](#).

To remove the association between a work order type and a work order task

- Find the work order task from which you want to remove a work order type.

For instructions, see [Searching for Work Order Tasks](#).

- Click the name of the work order task.

Civic Platform displays the work order task details.

The screenshot shows the 'Work Order Task Detail' page. At the top, there's a toolbar with buttons for 'Menu', 'Search', 'New', 'Delete', and 'Help'. Below the toolbar, there are three tabs: 'Work Order Task Detail' (selected), 'Work Order Template (1)', and 'Work Order Types (1)'. The main area shows a table of work order tasks. The columns are 'Task Code', 'Description', 'Default Standard Operating Procedures', 'Default Estimate', 'Effective Date', 'Expiration Date', 'Updated Date', 'Updated By', and 'Record Status'. The table lists several tasks, including '553', 'Check Fluid', 'Inspect B...', 'Lubricate...', and 'Oil Change'. The 'Oil Change' row is currently selected. Below the table, there's a section for 'Task: Oil Change' with fields for 'Task Code' (set to 'Oil Change'), 'Default Estimate' (set to '887.00'), 'Duration Unit' (set to '-Select-'), 'Record Status' (set to 'Active'), 'Description' (a text input field), and 'Default Standard Operating Procedures' (a dropdown menu). There are also 'Effective Date' and 'Expiration Date' fields with calendar icons.

- Click the **Work Order Type** tab.

Civic Platform displays a list of all existing work order types related to the work order task.

Task: Oil Change

Menu Assign Delete Help

Work Order Task Detail Work Order Template (1) Work Order Types (1)

Record Type	Record Type Alias	Updated Date	Updated By	Record Status
AMS/Fleet/PM/NA	AMS/Fleet/PM/NA	02/26/2010	MIGRAION	Active

4. Select the work order type you want to remove from the selected task.

5. Click **Delete**.

Civic Platform removes the association between the work order type and the work order task and then displays a confirmation message.

Task: Oil Change

Menu Assign Delete Help

Work Order Task Detail Work Order Template (0) Work Order Types (0)

2 record(s) deleted successfully.

Record Type	Record Type Alias	Updated Date	Updated By	Record Status
0 record(s) found.				

Managing Cost Groups

In your agency some cost items might always work together. For example, for the installation of the fire hydrant, the cost items always include the contractor, a fire hydrant, a hose, and some other items. The Work Order portlet allows users to look up and select cost items by cost groups. If you can group the cost items together, you can simplify the work order creation process.

Topics

- [Creating a Cost Group](#)
- [Searching for a Cost Group](#)
- [Editing a Cost Group](#)
- [Deleting a Cost Group](#)
- [Managing Cost Items in a Cost Group](#)
- [Managing Cost Group Permissions](#)

Creating a Cost Group

You can select cost items and create a cost group for them.

To create a cost group

1. Access the Cost Group ([Navigating to the Setup Portlet](#)).
2. Click **New**.
Civic Platform displays the cost group details in the secondary tab.
3. Specify the group name, provide a description for the group if you want, and then click **Submit**.
Civic Platform displays a list of all existing cost groups including the item just recorded.

Searching for a Cost Group

You can search for a cost group and edit it.

To search for a cost group

1. Access the Cost Group ([Navigating to the Setup Portlet](#)).
2. Click **Search**.
Civic Platform displays the Cost Group search form portlet.
3. Specify the group name, provide a description for the group if you want, and then click **Submit**.
Civic Platform displays a list of cost groups that match the search criteria.

Editing a Cost Group

You can select a cost group and edit the details.

To edit a cost group

1. Access the Cost Group ([Navigating to the Setup Portlet](#)).
2. Click the link for the cost group you want to modify.
You might need to search for the cost item. For instructions on performing a search, see [Searching for a Cost Group](#).
Civic Platform displays the Cost Group details.
3. Update the necessary fields that display.
4. Click **Save**.
Civic Platform saves the changes for the cost group.

Deleting a Cost Group

You can delete any cost group that you no longer need.

To delete a cost group

1. Access the Cost Group ([Navigating to the Setup Portlet](#)).
2. Select each cost group that you want to delete.
Civic Platform displays the fields that apply to the cost group.
3. Click **Delete**.
Civic Platform displays a message indicating cost group(s) deleted successfully.

Managing Cost Items in a Cost Group

The Cost Item tab for a cost group lists all the cost items you add into the cost group.

Topics

- [Adding Cost Items into a Cost Group](#)
- [Removing Cost Items from a Cost Group](#)

Adding Cost Items into a Cost Group

If you find that some cost items are missing from the cost group, you can look up all available cost items to find the cost items and add them to the cost group.

To add cost items into a cost group

1. Access the Cost Group ([Navigating to the Setup Portlet](#)).
2. Click **Look Up** in the Cost Item tab for a cost group.
Civic Platform displays the fields that apply to the cost item for the look up.
3. Complete the appropriate fields based on which you want to look for cost items. For a description of fields, see [Table 199: Work Order Cost Item Definitions](#).
4. Click **Submit**.
Civic Platform displays the lookup result list.
5. Select the cost items you want to add to the cost group.
6. Click **Select**.
Civic Platform displays a confirmation message.

Removing Cost Items from a Cost Group

You can remove any cost item from a cost group.

To remove cost items from a cost group

1. Access the Cost Group ([Navigating to the Setup Portlet](#)).
2. Click the link for the cost group you want to modify. You might need to search for the cost item.
Civic Platform displays the cost group details in the secondary tab.
3. Select the **Cost Item** tab.
Civic Platform displays a list of cost items included in the cost group.
4. To remove one or more items, select the items and then click **Delete**.
Civic Platform displays a confirmation message.

Managing Cost Group Permissions

You can see the agencies, modules, user groups, departments, and users assigned to the cost group on the Recipient tab in the Cost Group portlet ([Navigating to the Setup Portlet](#)). For more information, see [Setting Up Security Policies](#).

Managing Work Order Costing

Work orders must identify costing information such as employee hourly rates, and material and equipment costs, to accurately track the total cost of a specific job. Administrators have the ability to create cost items, associates cost rates to cost items, and assign cost items to user group, department or agency. Users with permissions can associate cost items with work orders.

Topics

- [Adding a Work Order Cost Item](#)
- [Searching for a Work Order Cost Item](#)
- [Editing a Work Order Cost Item](#)

- [Deleting a Work Order Cost Item](#)
- [Managing Cost Rates](#)
- [Managing Cost Item Permissions](#)

Adding a Work Order Cost Item

The breakdown of the cost information associated with work order is also very important. For example, employee hourly rates, material and equipment costs are types of costing items you must identify and track for work orders generated by an agency. You must identify the costing item definitions that you associate with a work order before you can enter costing data for a work order. Some of the information recorded for each cost item is read-only for users without administrative privileges, but is available for the user to associate with the work order.

To add a new work order cost item

1. Access the Cost Item portlet ([Navigating to the Setup Portlet](#)).

2. Click **New**.

Civic Platform displays the cost item details in the tab.

3. Enter the Cost Type, Item, Factor, and Cost.

4. Complete any of the remaining fields that display.

For a list of field descriptions, see [Table 199: Work Order Cost Item Definitions](#).

5. Click **Submit**.

Civic Platform displays a list of all existing work order cost items including the item just recorded.

Searching for a Work Order Cost Item

Use the search feature to find a specific work order cost item. For example, if you were looking for an equipment cost item currently set at a fixed price of \$50, enter the cost type of equipment and the fixed price cost to 50 in your search criteria along with any other information you might have on the item. The search result provides you with all of the equipment cost items set at \$50.

To search for a work order cost item

1. Access the Cost Item portlet ([Navigating to the Setup Portlet](#)).

2. Click **Search**.

Civic Platform displays the fields that apply to the work order cost item.

3. Complete the appropriate fields associated with the cost item you are searching for.

4. Click **Submit**.

Civic Platform returns a list of all work order cost items that match your search parameters.

Editing a Work Order Cost Item

Use the following procedure to edit a cost item. For example, a contractor who installs fire hydrants changes the unit cost. In this example, you can find and select the cost item for the specific contractor that needs updating and modify the fixed cost, unit cost, and units of measure to reflect the current information.

To edit a cost item

1. Access the Cost Item portlet ([Navigating to the Setup Portlet](#)).

2. Open the cost item that you want to review and edit.

Civic Platform displays the cost item details on the tabs.

The screenshot shows the 'Cost Item' portlet interface. At the top, there's a toolbar with buttons for 'Menu', 'Assign', 'Search', 'New', 'Delete', 'Delete Recipients', and 'Help'. Below the toolbar is a navigation bar with page numbers from 1 to 10. The main area displays a table of cost items with columns: Cost Type, Cost Item, Fixed Rate, Unit Rate, Default Cost Factor, Unit of Measure, Description, Cost Subgroup, Default Cost Account, and Record Status. The last row, 'Equipment 123 - Chipper', is selected and highlighted in blue. Below the table is another navigation bar with page numbers. The bottom section is a detailed view for the selected cost item, titled 'Cost Item: 123 - Chipper'. It has tabs for 'Cost Item Detail', 'Cost Rates (1)', and 'Recipient'. The 'Cost Item Detail' tab is active. It contains fields for Cost Type (Equipment), Fixed Rate (0), Default Cost Account (dropdown menu), Record Status (Active), Cost Item (123 - Chipper), Unit Rate (0), Cost Subgroup (dropdown menu), Default Cost Factor (dropdown menu), Unit of Measure (Hours), and Description (dropdown menu).

3. Update the necessary fields that display.

For a list of field descriptions, see [Table 199: Work Order Cost Item Definitions](#).

4. Click **Submit**.

Table 199: Work Order Cost Item Definitions

Cost Account	Select the appropriate cost account for the work order.
Cost Factor	Select the cost factor. Example: 1.0 Regular Pay, 1.5 Overtime Pay, 2.0 Holiday Pay. This field is primarily for labor cost types.
Cost Formula	Enter the formula that identifies how you want to calculate the cost item.
Cost Item	Enter the name for the cost item.
Cost Subgroup	Enter the subgroup for the cost item
Cost Type	Select the appropriate cost type, such as: contract, employee, materials.
Fixed Cost	Enter the fixed cost amount you want to use for the cost item. Enter hours, dollars, etc. using the appropriate units of measure for the cost item.
Record Status	Select the status of the cost item record. This field should default to Active.
Unit Cost	Enter the unit cost amount you want to use for the cost item. Enter hours, dollars, and so forth, using the units of measure appropriate to the cost item.
Unit of Measure	Select the unit of measure for the cost item.

Work Order Task	Select the work order task associated with the cost. Only the active or completed work order tasks display in the list. This item is not for adding cost entries.
-----------------	---

Deleting a Work Order Cost Item

If you enter a cost item by mistake, or if you no longer use the cost item, you can delete it. When you delete a cost item you remove it from Civic Platform and it is no longer available for viewing or when identifying costing for work orders or work order templates.

To delete a work order cost item

1. Access the Cost Item portlet ([Navigating to the Setup Portlet](#)).

2. Select each cost item definition that you want to remove.

3. Click **Delete** on the toolbar.

Civic Platform displays a message indicating record(s) deleted successfully.

Managing Cost Rates

Cost rates are a critical component of work order management. For example, you must track material and equipment cost rates to identify and track the costs of work orders your agency generates. When you set an asset type as a resource in the Administration portlet, you can define the cost rates for the asset. The cost rates you establish become the default rates that populate into forms when you add assets into work orders.

Topics

- [Adding a Cost Rate](#)
- [Editing a Cost Rate](#)
- [Deleting a Cost Rate](#)

Adding a Cost Rate

For each asset that you enable the “Asset as Resource” option, you can define multiple cost rates, although only one cost rate can be effective at any given time.

To add a cost rate

1. Access the Cost Item portlet ([Navigating to the Setup Portlet](#)).

2. Select the cost item that you want to work with.

3. Click the **Cost Rates** tab.

Civic Platform displays the Cost Rate list portlet.

4. Click **New**.

Civic Platform displays the Cost Rate detail portlet.

5. Complete the fields as necessary.

For a description of the fields, see [Table 200: Cost Rate Fields](#).

6. Click **Submit**.

Table 200: Cost Rate Fields

Active Date	The date when the cost rate becomes effective.
-------------	--

Expiration Date	The date when the cost rate expires.
Default Cost Factor	Select the cost factor. Example: 1.0 Regular Pay, 1.5 Overtime Pay, 2.0 Holiday Pay. This field is primarily for labor cost types. The Standard Choice COST_FACTOR defines the options for this field.
Fixed Rate	The fixed cost amount you want to use for the cost item. Enter units of measure such as hours, dollars, and so forth.
Unit Rate	The unit cost amount you want to use for the cost item. Enter units of measure such as hours, dollars, and so forth.

Editing a Cost Rate

You can edit any cost rate as necessary.

To edit a cost rate

1. Access the Cost Item portlet ([Navigating to the Setup Portlet](#)).
2. Select the cost item that you want to work with.
3. Click the **Cost Rates** tab.
Civic Platform displays the Cost Rate list portlet.
4. Select the cost rate that you want to update.
Civic Platform displays the Cost Rate detail portlet.
5. Update the fields as necessary.
For a description of the fields, see [Table 200: Cost Rate Fields](#).
6. Click **Save**.

You can edit any cost rate as necessary.

Deleting a Cost Rate

You can delete the cost rate that is no longer useful.

To delete a cost rate

1. Access the Cost Item portlet ([Navigating to the Setup Portlet](#)).
2. Select the cost item that you want to work with.
3. Click the **Cost Rates** tab.
Civic Platform displays the Cost Rate list portlet.
4. Select the cost rate that you want to delete.
5. Click **Delete**.

Managing Cost Item Permissions

You can configure the display of cost item information through the Recipient tab in the Cost Item portlet ([Navigating to the Setup Portlet](#)). Only the agency, module, user group, department, or user that you add to the Recipient tab has permission to work with the cost item in Civic Platform and Mobile Office. To make cost item permission take effect in Civic Platform, you must set FID 8461 Show Work Order Cost Information and FID 8484 Cost Item Permission to Full Access or Read Only. However, the cost item permission that you defined through the Recipient tab always takes effect in Mobile Office,

regardless of the setting on FID 8484 Cost Item Permission. For instructions on configuring these Function Identifications, see the *Accela Civic Platform Configuration Reference*.

In Civic Platform, users with permission can add the cost item to a work order, convert an assignment to the cost item, and distribute the cost item to certain assets. Users can also view or edit the actual numerical values of the cost information in the cost-related fields. Users without permission cannot add, edit, or delete a cost item. Nor can such users convert an assignment to the cost item, or distribute the cost item. Such users only see asterisks “***” in the cost-related fields for the cost item. See [Table 201: Cost-Related Fields in Civic Platform](#) for a list of cost-related fields that are under control of cost item permission.

In Mobile Office, users with permission can add the cost item to a work order, and can view, update, or delete the cost item. Users without permission cannot add, update, or delete the cost item. The actual values in the cost-related fields for the cost item display as asterisks (*****). See [Table 202: Cost-Related Fields in Mobile Office](#) for a list of cost-related fields that are under control of cost item permission.

For the detailed procedure about using the Recipient tab for a cost item, see [Setting Up Security Policies](#).

Table 201: Cost-Related Fields in Civic Platform

Field Name	Field Description	Example Access in Civic Platform
Cost	The cost of each cost type.	Summary tab for a work order Distribution History tab for a work order
Cost per Unit	The cost per each actual product unit. Cost per Unit = Total Job Cost/ Actual Prod. Units	Work Order list Record tab for a work order Summary form for a work order Application History tab for a work order
Est. Job Cost(or Estimated Cost)	The total estimated cost for the work order.	Work Order list Assignments and Costs tab for a work order
Fixed Rate	The fixed cost rate for the cost item, based on its unit of measure, such as hours or dollars.	Assignments and Costs tab for a work order
Total Job Cost (or Total Cost)	The total calculated job cost for the work order.	Work Order list Summary tab for a work order Application History tab for a work order Assignments and Costs tab for a work order
Undistributed Cost	The cost for the work order not distributed to assets.	Work Order list Record tab for a work order
Unit Rate	The unit cost rate for the cost item, based on the unit of measure, such as hours or dollars.	Assignments and Costs tab for a work order



Note:

If users do not have permission to work with the cost items listed on the Application History tab or the Distribution History tab, they see asterisks “***” instead of actual values in the cost-related fields for all the cost items.

Table 202: Cost-Related Fields in Mobile Office

Field Name	Field Description	Example Access in Mobile Office
Total Cost	The total calculated job cost for the work order.	Cost and Parts tab for a work order Cost subtab for a work order Work Order Tasks tab for a work order
Unit Cost	The unit cost rate for the cost item, based on the unit of measure, such as hours or dollars.	Cost subtab for a work order

Field Name	Field Description	Example Access in Mobile Office
Fixed Cost	The fixed cost rate for the cost item, based on the unit of measure, such as hours or dollars.	Cost subtab for a work order

Attaching Assets to Records

When you associate asset types with record types, you consolidate and filter the data that displays for users to view during daily processing. As a result, the user only sees applicable record types for that particular asset type, which eliminates the possibility of accidentally choosing an invalid option from a large list of choices.

Click a topic title below for full details.

Related Information

[Overview of the Assets Common Component](#)

Overview of the Assets Common Component

The Assets Common Component portlet enables users of non-Accela Civic Platform - Asset solutions (the Land Management, Licensing and Case Management, and Service Request solutions) to access a subset of asset management functionality, including the following tabs:

- Asset Detail
- Address
- Records
- Linked Assets
- Documents
- Condition
- Contact

Users with the proper permissions can access relevant records from the Assets portlet. For example, a user with permission to access the Asset Management and Service Request solutions can view Service Request records from within the Assets portlet.

Enabling Asset Management Across Solutions

To enable this feature, you must set the following FIDs, at a minimum:

- 8189-Asset Data Management
Enables users of the Land Management, Licensing and Case Management, and Service Request solutions to access the Asset Common Component.
- 8203-Daily Record Asset
Enables the Assets tab on Record Details.

Depending on your configuration of Civic Platform, you might need to set additional FIDs. Refer to the following for full details:

- Accela Civic Platform Configuration Reference, Asset Management chapter.
This cross-reference provides a complete list of Asset Management FIDs, organized according to product area or by feature use case.

- Accela Civic Platform Configuration Reference, Function IDs Reference chapter
In this numerical listing, refer to FID 8189-Asset Data Management, the parent FID, which includes a detailed listing of all subordinate FIDs with interdependencies, and interoperability information.

Providing Access to the Assets Common Component

To enable users to view and manage assets outside of the Asset Management solution, for example, in the Land Management, Licensing and Case Management, and Service Request solutions, you must provide access to the portlet named Assets Common Component. Do this by [Adding a Main Link](#) to it.

Main links display along the top of the page in the Civic Platform console, and provide a means of accessing the portlets where users perform their daily tasks.

Associating Asset Types with Record Types

When you associate asset types with record types, you consolidate and filter the data that displays for users to view during daily processing. As a result, the user only sees applicable record types for that particular asset type, which eliminates the possibility of accidentally choosing an invalid option from a large list of choices.

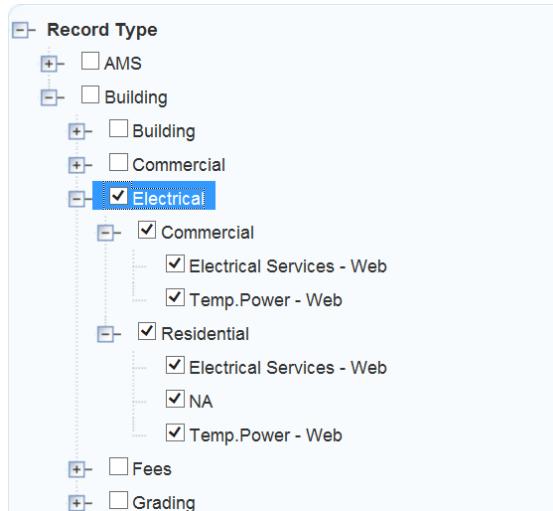
To associate an asset type with a record type

1. Access the Asset Type Administration portlet (V360 Admin > Assets > Type).
2. With the navigation tree, choose the Asset Type you want to associate with a record type.
3. Click the **Record Types** tab in the **Asset Type** detail portlet.

Civic Platform displays the record types currently associated with the asset type.

Record Type	Updated Date	Updated By	Record Status	Record Type Alias
AMS/Public Works/Stree...	08/03/2012	MBAN	Active	AMS/Public Works/Stree...
Building/Building/Comm...	12/12/2013	CSPINK	Active	Commerical Addition

4. Click **Assign**.
Civic Platform displays a Record Type navigation tree.
5. Select the record types that you want to associate with the asset type.
 - You can click **Search** to locate a record by typing all or part of the record name.
 - Selecting a higher level of organization also selects its subordinate levels.



6. Click **Submit**.

Civic Platform displays a success message.

Asset Type: Light

Menu **Assign** **Delete** **Help**

Asset Type **Record Types (7)** **Rating Types (1)** **Usage Types (0)**

5 record(s) added successfully.

<input type="checkbox"/> Record Type	Updated Date	Updated By	Record St
<input type="checkbox"/> AMS/Public Works/Stree...	08/03/2012	MBAN	Active
<input type="checkbox"/> Building/Building/Comm...	12/12/2013	CSPINK	Active
<input type="checkbox"/> Building/Electrical/Co...	12/13/2013	CSPINK	Active
<input type="checkbox"/> Building/Electrical/Co...	12/13/2013	CSPINK	Active
<input type="checkbox"/> Building/Electrical/Re...	12/13/2013	CSPINK	Active
<input type="checkbox"/> Building/Electrical/Re...	12/13/2013	CSPINK	Active
<input type="checkbox"/> Building/Electrical/Re...	12/13/2013	CSPINK	Active

Setting Asset Security to Enable Asset Look Up

To enable public users to use the Look Up feature to locate assets in Citizen Access, you must set the asset's security level to Read or Full. If you accept the default security level of None, public users cannot locate assets with the Look Up feature.

To set security to enable asset look up in Citizen Access

1. Access the Asset Security Administration portlet (V360 Admin > Assets > Security).
2. Navigate to Asset Type by Group, and select the asset type in the navigation tree.
3. Click Assign > Assign Agency.

Asset Type: Sign

Assign Delete Help

Assign Agency

Assign Module

Assign Group

Name Type

Street Light Group
 Maintenance

4. Select an asset access level of Read or Full, depending on your agency objectives.

Asset Type: Light

Submit Help

Asset Access

Asset Access

Full
Read
None

5. Click **Submit**.

Civic Platform displays a success message, Status Saved Successfully.

Configuring the Asset Component in Citizen Access

To enable public users to add assets to applications during the application creation process, you must configure the asset component's page flow and page layout. Refer to the Citizen Access Administrator Guide for instructions on configuring page flows and page layouts.

Part 10: Licensing

Civic Platform provides a complete end-to-end solution for licensing, including education, examinations, and renewals.

Related Information

[Education, Continuing Education, and Examinations for Licensing](#)

[License Renewal](#)

Education, Continuing Education, and Examinations for Licensing

The Education portlet enables you to configure and collect the education information necessary to issue a professional or occupational license. Refer to [Managing Education](#) to configure the education feature.

The Continuing Education portlet enables you to record and track the continuing education requirements being fulfilled for each of the individuals licensed or certified through your agency. See [Managing Continuing Education](#) to configure the continuing education feature.

The Examination portlet enables you to record the exam scores obtained by individuals seeking to acquire or maintain their professional certification. See [Managing Examinations](#) to configure the examination feature.

CAUTION: When an administrator uses the Continuing Education or Examination portlets, Civic Platform automatically creates the Standard Choices CONTINUING_EDUCATION_REQUIRED_HOURS and CONTINUING_EDUCATION_WORKFLOW_TASK_STATUS for Continuing Education, and EXAMINATION_WORKFLOW_TASK_STATUS for Examination, and uses them to store specific data in the Civic Platform database. Administrators should not manually add or modify the Values or Value Descriptions for these Standard Choices through the common Standard Choices pages. If an administrator incorrectly configures or disables one of these Standard Choices, it impacts the functionality of the corresponding Continuing Education or Examination portlet.

You must also create provider records for each of the educational institutions and any other organizations offering professional degrees, continuing education, or certification examinations that you want to track. Refer to “Working with Providers” in the *Accela Civic Platform User Guide* for specifics on managing providers.

This section explains how to create provider records, and associate those providers with the specific education degrees, continuing education offerings, and examinations required to obtain or maintain a variety of professional licenses.

Click a topic title below for full details.

Related Information

[Managing Education](#)

[Managing Continuing Education](#)

[Managing Examinations](#)

Managing Education

Topics

- [Configuring Education](#)
- [Creating and Using Education Records](#)

Configuring Education

Topics

- [Determining Access to Education on Forms](#)

Determining Access to Education on Forms

When a user creates a new application in Civic Platform, the Intake Form Configuration Group code associated with the application type determines which standard sections display on the application. As administrator, you can choose to define and associate the Education Intake Form Configuration Group to an application type.

To set the Education option in the Intake Form Configuration Group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Application > Intake Form Configuration Group**.
Civic Platform displays a list of Intake Form Configuration Groups.
3. Click the red dot by the Intake Form Configuration Group that you want to edit.
Civic Platform displays the Intake Form Configuration Group Details-Edit page.

SmartChoice Group Details - Edit
Use this form to edit the group details

Group Name: LIC_TRADES

	Display	Required	Validate	Default Value	Display Button	Display Order
CAP Detail:						16
Address:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			19
Parcel:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			0
Owner:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			1
Licensed Professional:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			18
Applicant:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	17
Contact1:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	2
Contact2:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	3
Contact3:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	4
Multiple Contacts:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Click to add contact types	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	15
Complainant Info:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				5
Complaint Info:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				6
Additional Info:	<input type="radio"/> Yes <input checked="" type="radio"/> No					7
Application Status:	<input type="radio"/> Yes <input checked="" type="radio"/> No					8
Application Specific Info:	<input checked="" type="radio"/> Yes <input type="radio"/> No					20
Associated GIS Features:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				9
Structure:	<input type="radio"/> Yes <input checked="" type="radio"/> No			<input type="button" value="▼"/>		10
Establishment:	<input type="radio"/> Yes <input checked="" type="radio"/> No					13
Event:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				11
Asset:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				12
Application Specific Info Table:	<input checked="" type="radio"/> Yes <input type="radio"/> No					21
Documents:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				14
Education:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				22
Continuing Education:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				23
Examination:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				24
Comments:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				

4. Update the values for the Continuing Education section of the application as desired.
5. Click **Save**.

Creating and Using Education Records

Before using the education feature to track education requirements for licenses, you must perform the following setup tasks:

- Verify the necessary education provider records exist, or create new education provider records, if needed. Refer to “Contacts and Licensed Professionals” in the *Accela Civic Platform User Guide*.

- Create and enable an education record containing information about the degree.
- Associate the education record with the education providers that offer the degree.
- Associate the education record with the corresponding record types. You typically associate education records with new license record types.

You must complete those steps for each education provider, education record, and licensed professional record type you need to track.

Topics

- [Creating an Education Record](#)
- [Associating an Education Record with Education Providers](#)
- [Associating an Education Record with a Record Type](#)
- [Viewing Education Records](#)
- [Searching for Education Records](#)
- [Editing Education Records](#)
- [Deleting Education Records](#)

Creating an Education Record

An education record contains information about an educational program and degree for a licensed professional.

To create an education record

1. Access the Education Maintenance portlet ([Navigating to the Setup Portlet](#)).
2. Click **New**.
Civic Platform displays the Education detail portlet.
3. Complete the fields as described.

Education Name	Enter a unique name for the education record. For example, you can use the name of the degree the licensed professional holds, such as Nurse - RN, Nurse - LPN, Electrical Engineer, or Teacher - Elementary Ed.
Degree	Choose the degree required for this educational program from the drop-down list.
Status	Enable or disable an education record by selecting an option from the drop-down list.
Template	Choose a default template to associate with the education record. When you make a selection, the template (ASI/ASIT) fields display on the new education form. You can enter data in the template fields or leave them blank. If you enter data, it becomes default data for those same fields when a user or citizen creates a new education or examination record with that associated template in Civic Platform or Citizen Access. If you leave any of the template fields blank, the fields are simply available for the user or citizen to use
Comments	Enter any relevant comments about this Education record

4. Click **Submit**.
Civic Platform adds the education record to the Education Maintenance portlet.

Associating an Education Record with Education Providers

Because multiple Providers might offer the same degree program, you can associate the Education record with as many Providers as apply.

To associate an Education record with the Education Providers

1. Access the Education Maintenance portlet ([Navigating to the Setup Portlet](#)).

2. From the Education Maintenance portlet, select the desired Education record.

Civic Platform displays the Education record in the Education detail portlet.

3. From the Education detail portlet, select the **Providers** tab.

Civic Platform lists any Providers already associated with this Education record.

4. To associate this record with another Provider, click **Assign**.

Alternatively, from the Education Maintenance portlet, select the Education names you need to associate with Providers, and then click **Assign > Assign Provider**.

Civic Platform displays a Search window.

5. Enter a portion of the desired Provider Name or Provider Number in the search field, and then click **Submit**.

Civic Platform displays a list of Providers that match the search criteria.

6. If the desired Education Provider displays, select the Provider name and click **Submit**. If there are multiple Providers that provide this Education, you can select all that apply.

Civic Platform adds the provider to the list of Providers associated with the selected Education records.

- If the desired Education Provider does not display, click **Search** to retry your search using different search parameters.
- If you cannot find the desired Education Provider, refer to the “Contacts and Licensed Professionals” chapter in the *Civic Platform User Guide* for instructions on creating a new Education Provider record or adding an existing Continuing Education or Examination Provider to the Education Provider list.

Associating an Education Record with a Record Type

You can associate an Education record with each of the record types to which it applies.

To associate an Education record with a record type

1. Access the Education Maintenance portlet ([Navigating to the Setup Portlet](#)).

2. From the Education detail portlet, select the **Record Types** tab.

Civic Platform lists any record types already associated with this Education Record.

3. To associate this record with another Record Type, click **Assign**.

Civic Platform displays the list of available Record Type categories.

4. Expand the Record Type to view subtypes within the category.



Note:

If you are having difficulty locating the desired Record Type, click **Search**. Enter all or part of the Record Type alias in the Search Field and click **OK**. Note that the Search is case-sensitive. Civic Platform highlights any Record Types matching your search criteria, making it easier for you to view them in the list.

5. When you have located the desired Record Types, select the Record Type aliases and click **Submit**.
Civic Platform adds the Record Type to the list of Record Types associated with this Education record.
6. To remove a Record Type, select the Record Type and click **Delete**.
Civic Platform removes the Record Type from the list of Record Types associated with this Education record.

Viewing Education Records

You can view Education records through the Education Maintenance portlet.

To view Education records

1. Access the Education Maintenance portlet ([Navigating to the Setup Portlet](#)).

The Education records that currently exist in Civic Platform display. Civic Platform provides links to additional pages if it cannot display all records on one page.

Searching for Education Records

You can Search the Education Maintenance portlet for a specific Education record.

To search for an Education record

1. Access the Education Maintenance portlet ([Navigating to the Setup Portlet](#)).
2. From the Education Maintenance portlet, click **Search**.
Civic Platform displays a Search window.
3. Enter a portion of the desired Education record name, and/or any other relevant information, and then click **Submit**.
Civic Platform displays a list of Education records that match the search criteria.
4. If the desired Education record does not display, click **Search** again to retry your search using different search parameters.

Editing Education Records

You can edit education records through the Education Maintenance portlet.

To edit an Education record

1. Access the Education Maintenance portlet ([Navigating to the Setup Portlet](#)).
2. From the Education Maintenance portlet, select the Education record.
Civic Platform displays the Education record in the Education detail portlet.

<input type="checkbox"/> Education Name	Degree	Comments	Status	ASI TEMPLATE
<input type="checkbox"/> CET-6	MBA		Enabled	VERA_AS15
<input type="checkbox"/> Chinese	Doctor	Commnet2	Enabled	ASI GROUP 3
<input type="checkbox"/> Chinese1	Bachelor	comm3	Enabled	ASI GROUP 3
<input type="checkbox"/> Chinese1	Doctor		Enabled	BLDG_ADDRESS
<input type="checkbox"/> D Education	Bachelor		Enabled	DE_VAC
<input type="checkbox"/> English1	Doctor	comm1	Enabled	ASI GROUP 1
<input type="checkbox"/> French	Bachelor		Enabled	ASI GROUP 2

3. Select the desired tab, and edit the Education record as necessary:

- **Education tab** – On this tab, you can view or edit the details about the Education. See [Creating and Using Education Records](#).
- **Providers tab** – On this tab, you can view, assign or delete the Education Providers associated with this Education. See [Associating an Education Record with Education Providers](#).
- **Record Types tab** – On this tab, you can view, assign or delete the Record Types associated with this Education. See [Associating an Education Record with a Record Type](#).

Deleting Education Records

Because of the many ways you can connect Education records to other records within Civic Platform, such as Provider records and Licensed Professional records, the process of deleting an Education record disables it; it does not remove or delete it from Civic Platform. Instead, Civic Platform performs a “soft delete,” and changes the record’s status to Disabled. Disabling the record allows the record to remain in any previous associations, but prevents you from using it again. If at some point in the future you need to use the disabled record, you can edit the record to change its status to Enabled.

To delete (disable) an Education record

1. Access the Education Maintenance portlet ([Navigating to the Setup Portlet](#)).
The Education records that currently exist in Civic Platform display.
2. Select the Education you need to disable, and then click **Delete**.
 - If you associated the selected Education record with a Provider and/or a Licensed Professional Record Type, you cannot delete it.
 - If you associated the selected Education record with a Provider and/or a Licensed Professional Record Type, Civic Platform changes its status to Disabled.

Managing Continuing Education

Topics

- [Configuring Continuing Education](#)
- [Creating and Using Continuing Education Records](#)

Configuring Continuing Education

Continuing Education provides the capability for a Record to capture and require Continuing Education information. Users can enter this information on either an application intake form, or the Continuing Education tab on the Record. Administrators can configure Continuing Education requirements and link them to Record Types and Continuing Education Providers, as well as to a workflow, preventing Task completion until the requirements are met. Before creating and working with Continuing Education records, perform the prerequisite configuration tasks.



Note:

When an administrator uses the Continuing Education portlet, Civic Platform automatically creates the Standard Choices CONTINUING_EDUCATION_REQUIRED_HOURS and CONTINUING_EDUCATION_WORKFLOW_TASK_STATUS, and uses them to store specific data. Administrators should not manually add or modify the Values or Value Descriptions for these Standard Choices. If an administrator should incorrectly configure or disable these Standard Choices, it impacts the functionality of the Continuing Education record setting portlet, and the user receives the error message: *Standard Choice configuration error. Please contact administrator.*

Topics

- [Determining Access to Continuing Education on Forms](#)
- [Continuing Education Workflow Configuration](#)

Determining Access to Continuing Education on Forms

When a user creates a new application in Civic Platform, the Intake Form Configuration Group code associated with the application type determines which standard sections display on the application, what information is mandatory. As administrator, you can choose to define and associate the Continuing Education Intake Form Configuration Group to an application type.

To set the Continuing Education option in the Intake Form Configuration Group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Application > Intake Form Configuration Group**.
Civic Platform displays a list of Intake Form Configuration Groups.
3. Click the red dot by the Intake Form Configuration Group that you want to edit.
Civic Platform displays the Intake Form Configuration Group Details-Edit page.

SmartChoice Group Details - Edit

Use this form to edit the group details

Group Name: LIC_TRADES

	Display	Required	Validate	Default Value	Display Button	Display Order
CAP Detail:						16
Address:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			19
Parcel:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			0
Owner:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			1
Licensed Professional:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			18
Applicant:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	17
Contact1:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	2
Contact2:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	3
Contact3:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	4
Multiple Contacts:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Click to add contact types	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	15
Complainant Info:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				5
Complaint Info:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				6
Additional Info:	<input type="radio"/> Yes <input checked="" type="radio"/> No					7
Application Status:	<input type="radio"/> Yes <input checked="" type="radio"/> No					8
Application Specific Info:	<input checked="" type="radio"/> Yes <input type="radio"/> No					20
Associated GIS Features:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				9
Structure:	<input type="radio"/> Yes <input checked="" type="radio"/> No			<input type="button" value="▼"/>		10
Establishment:	<input type="radio"/> Yes <input checked="" type="radio"/> No					13
Event:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				11
Asset:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				12
Application Specific Info Table:	<input checked="" type="radio"/> Yes <input type="radio"/> No					21
Documents:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				14
Education:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				22
Continuing Education:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				23
Examination:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				24
Comments:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				

4. Update the values for the Continuing Education section of the application as desired.

5. Click **Save**.

Civic Platform updates the Intake Form Configuration Group using the settings you specified.

Continuing Education Workflow Configuration

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. You define the workflow process assigned to the record type when you create the record type; however, you must also assign it to the Continuing Education process through the Record Setting tab of the Continuing Education Maintenance portlet.

For more information on workflow, refer to [Designing Workflows](#) .

Topics

- [Assigning a Continuing Education Workflow Task to a Record Type](#)

Assigning a Continuing Education Workflow Task to a Record Type

Assigning a workflow task to Continuing Education takes place at the Record Type level. This setting instructs Civic Platform which workflow logic to use for a particular Record Type.

To assign a Continuing Education workflow task to a Record Type

1. Access the Continuing Education Maintenance portlet ([Navigating to the Setup Portlet](#)).

2. Select the **Record Setting** tab.

Any Record Types that have already assigned a corresponding Workflow Task/Status Check display.

3. Click **Add** to add a new Record Type.

Civic Platform adds a blank line to the list.

4. Expand the **Record Type** navigation tree and browse to locate the desired Record Type. Refer to [Designing Workflows](#) for more information.

Civic Platform adds the selected record type to the Record Type list.

5. Enter the number of **Hours** required to meet the Continuing Education requirement at the Record Type level.

6. Expand the **Workflow Task/Status Check** navigation tree and browse to locate the desired workflow task status.

7. From the **Record Status** drop-down list, select **Enabled** to activate this Record Setting.

8. Repeat through for each Record Type you need to associate with a Workflow Task.

9. Click **Submit**.

Civic Platform associates the listed Record Types with the specified Workflow Tasks.

Creating and Using Continuing Education Records

Before using the Continuing Education feature to track ongoing Continuing Education requirements for Licenses, you must perform the following setup tasks:

- Verify you have created and enabled the necessary Continuing Education Provider records, or create new Education Provider records, if needed. See the “Contacts and Licensed Professionals” topic in the *Accela Civic Platform User Guide*.
- Create and enable a Continuing Education record containing information about the courses and/or hours required to maintain or renew the specified Professional License.
- Associate the Continuing Education record with the Continuing Education Providers that offer the degree.
- Associate the Continuing Education record with the corresponding Licensed Professional Record Types. You typically associate Continuing Education record with a “renewal license” record type.

You must complete these steps for each Continuing Education Provider, Continuing Education Record, and Licensed Professional Record Type you need to track.

Topics

- [Creating a Continuing Education Record](#)
- [Associating Education Records with Education Providers](#)
- [Associating a Continuing Education Record with a Record Type](#)
- [Viewing Continuing Education Records](#)
- [Searching for Continuing Education Records](#)
- [Editing Continuing Education Records](#)
- [Deleting Continuing Education Records](#)

Creating a Continuing Education Record

A Continuing Education record contains information about ongoing professional development that the state requires for a Licensed Professional.

To create a Continuing Education record

1. Access the Continuing Education Maintenance portlet ([Navigating to the Setup Portlet](#)).

2. Click **New** to create a new Continuing Education record.

Civic Platform displays the Continuing Education detail portlet.

3. Complete the fields as described.

Education Name	Enter a distinctive name for the continuing education record. For example, you can create a name using an abbreviated form of the course, professional development program, trade journal, or other program.
Grading Style	Select an option from the drop-down list: Pass/Fail, Passing Score, Passing Percentage, or None. If you select Passing Score or Passing Percentage, an additional field displays, enabling you to enter the score/percentage required to pass the course.
Status	Enable or disable a continuing education record by selecting an option from the drop-down list.
Template	Choose a default template to associate with the continuing education record. When you make a selection, the template (ASI/ASIT) fields display on the new continuing education form. You can enter data in the template fields or leave them blank. If you enter data, it becomes default data for those same fields when a user or citizen creates a new continuing education record with that associated template in Civic Platform or Citizen Access. If you leave any of the template fields blank, the fields are simply available for the user or citizen to use.
Comments	Enter any relevant comments about this continuing education record

4. Click **Submit**.

Civic Platform creates the Continuing Education record in the Continuing Education Maintenance portlet.

Associating Education Records with Education Providers

Because there are often multiple continuing education providers that offer the same professional development program, you can associate a Continuing Education record with as many continuing education providers as applicable.

To associate a Continuing Education record with the Continuing Education Providers

1. Access the Continuing Education Maintenance portlet ([Navigating to the Setup Portlet](#)).

2. From the Continuing Education Maintenance portlet, select the desired Continuing Education record.

Civic Platform displays the Continuing Education record in the Continuing Education detail portlet.

3. From the Continuing Education detail portlet, select the **Providers** tab.

Any Providers already associated with this Continuing Education record display in a list.

4. To associate this record with another Provider, click **Assign**.

Alternatively, from the Continuing Education Maintenance portlet, select the Continuing Education names you need to associate with Providers, and then click **Assign > Assign Provider**.

Civic Platform displays a Search window.

5. Enter a portion of the desired Provider Name or Provider Number in the search field, and then click **Submit**.

Civic Platform displays a list of Providers that match the search criteria.

6. If the desired Continuing Education Provider displays, select the Provider name and click **Submit**. If there are multiple Providers that provide this Continuing Education, you can select all that apply.

Civic Platform adds the provider to the list of Providers associated with the selected Continuing Education records.

- If the desired Continuing Education Provider does not display, click **Search** to retry your search using different search parameters.
- If you cannot find the desired Continuing Education Provider, refer to the “Contacts and Licensed Professionals” topic in the *Accela Civic Platform User Guide* for instructions on creating a new Continuing Education Provider record or adding an existing Education or Examination Provider to the Continuing Education Provider list.

Associating a Continuing Education Record with a Record Type

You can associate a Continuing Education record with each of the Licensed Professional record types to which it applies.

To associate a Continuing Education record with a Record Type

1. Access the Continuing Education Maintenance portlet ([Navigating to the Setup Portlet](#)).

2. From the Continuing Education detail portlet, select the **Record Types** tab.

Any Record Types already associated with this Continuing Education record display.

3. To associate this record with another Record Type, click **Assign**

Civic Platform displays the list of available Record Type categories.

4. Expand the Record Type to view subtypes within the category.

If you are having difficulty locating the desired Record Type, click **Search**. Enter all or part of the Record Type alias in the Search Field and click **OK**. The Search is case-sensitive. Civic Platform highlights any Record Types matching your search criteria, making it easier for you to view them in the list.

5. When you have located the desired Record Types, select the Record Type aliases and click **Submit**.

Civic Platform adds the Record Type you selected to the list of Record Types associated with this Continuing Education record.

To remove a Record Type, select the Record Type and click **Delete**.

Civic Platform removes the record type from the list of Record Types associated with this Continuing Education record.

Viewing Continuing Education Records

You can view Continuing Education records through the Continuing Education Maintenance portlet.

To view Continuing Education records

1. Access the Continuing Education Maintenance portlet ([Navigating to the Setup Portlet](#)).

The Continuing Education records that currently exist in Civic Platform display. If there are more records than Civic Platform can display on a single page, links to additional pages display.

Searching for Continuing Education Records

You can Search the Continuing Education Maintenance portlet for a specific Continuing Education record.

To search for a Continuing Education record

1. Access the Continuing Education Maintenance portlet ([Navigating to the Setup Portlet](#)).
2. From the Continuing Education Maintenance portlet, click **Search**.
Civic Platform displays a Search window.
3. Enter a portion of the desired Continuing Education record name, and/or any other relevant information, and then click **Submit**.
Civic Platform displays a list of Continuing Education records that match the search criteria.
4. If the desired Continuing Education record does not display, click **Search** again to retry your search using different search parameters.

Editing Continuing Education Records

You can edit Continuing Education records through the Continuing Education Maintenance portlet.

To edit a Continuing Education record

1. Access the Continuing Education Maintenance portlet ([Navigating to the Setup Portlet](#)).
2. From the Continuing Education Maintenance portlet, select the Continuing Education record you need to edit.
Civic Platform displays the Continuing Education record in the Continuing Education detail portlet.
3. Select one of the following tabs, and edit the Continuing Education record as necessary.
 - **Continuing Education** tab – to view or edit the details about the Continuing Education, see [Creating a Continuing Education Record](#).
 - **Providers** tab – to view, assign, or delete the Continuing Education Providers associated with this Continuing Education, see [Associating Education Records with Education Providers](#).
 - **Record Types** tab – to view, assign, or delete the Record Types associated with this Continuing Education, see [Associating a Continuing Education Record with a Record Type](#).

Deleting Continuing Education Records

Because of the many ways you can connect Continuing Education records to other records within the Civic Platform system, such as Provider records, Record Types, and so forth, the process of deleting a Continuing Education record does not actually remove the record from Civic Platform. Instead, Civic Platform performs a “soft delete,” and changes the record’s status to Disabled. Disabling the record, rather than fully deleting it, allows the record to remain in any previous associations, but prevents you from using it again. If at some point in the future you need to use the disabled record, you can edit the record to change its status to Enabled.

To delete (disable) a Continuing Education record

1. Access the Continuing Education Maintenance portlet ([Navigating to the Setup Portlet](#)).
The Continuing Education records that currently exist in Civic Platform display.
2. Select the Continuing Education you want to delete, and then click **Delete**.
 - If you associated the selected Continuing Education record with a Provider and/or a Licensed Professional Record Type you cannot delete it.

- If you did not associate the selected Continuing Education record with a Provider and/or a Licensed Professional Record Type, Civic Platform changes its status to Disabled.

Managing Examinations

- [Configuring Examinations](#)
- [Creating and Using Examination Subjects](#)

Configuring Examinations

Examination provides the capability for a Record to capture and require Examination information. You can enter this information on either an application intake form, or the Examination tab on the Record. Administrators can configure Examination requirements and link them to Record Types and Education Providers, as well as to a Workflow Task and Status, preventing Task completion until the requirements are met.

Before creating and working with Examinations, you must perform the following setup tasks:

When an administrator uses the Examination portlet, Civic Platform automatically creates the Standard Choice EXAMINATION_WORKFLOW_TASK_STATUS, and uses it to store specific data. Administrators should not manually add or modify the Values or Value Description for this Standard Choice. If an administrator should incorrectly configure or disable this Standard Choice, it impacts the functionality of the Examination portlet, and the user receives the error message: "Standard Choice configuration error. Please contact administrator."

- [Determining Access to Examinations on Forms](#)
- [Configuring Examination Workflows](#)

Determining Access to Examinations on Forms

When a user creates a new application in Civic Platform, the Intake Form Configuration Group code associated with the application type determines which standard sections display on the application, and what information Civic Platform requires. As administrator, you can choose to define and associate the Examination Intake Form Configuration Group to an application type.

To set the Examination option in the Intake Form Configuration Group

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Navigate to **Application > Intake Form Configuration Group**.
Civic Platform displays a list of Intake Form Configuration Groups.
3. Click the red dot by the Intake Form Configuration Group that you want to edit.
Civic Platform displays the Intake Form Configuration Group Details-Edit page.

SmartChoice Group Details - Edit

Use this form to edit the group details

Group Name: LIC_TRADES

	Display	Required	Validate	Default Value	Display Button	Display Order
CAP Detail:						16
Address:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			19
Parcel:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			0
Owner:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			1
Licensed Professional:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No			18
Applicant:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	17
Contact1:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	2
Contact2:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	3
Contact3:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Applicant	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	4
Multiple Contacts:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Click to add contact types	<input checked="" type="checkbox"/> As Owner <input checked="" type="checkbox"/> As Lic Prof	15
Complainant Info:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				5
Complaint Info:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				6
Additional Info:	<input type="radio"/> Yes <input checked="" type="radio"/> No					7
Application Status:	<input type="radio"/> Yes <input checked="" type="radio"/> No					8
Application Specific Info:	<input checked="" type="radio"/> Yes <input type="radio"/> No					20
Associated GIS Features:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				9
Structure:	<input type="radio"/> Yes <input checked="" type="radio"/> No			<input type="button" value="▼"/>		10
Establishment:	<input type="radio"/> Yes <input checked="" type="radio"/> No					13
Event:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				11
Asset:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				12
Application Specific Info Table:	<input checked="" type="radio"/> Yes <input type="radio"/> No					21
Documents:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				14
Education:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				22
Continuing Education:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				23
Examination:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				24
Comments:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No				

4. Update the values for the Examination section of the application as desired.

5. Click **Save**.

Civic Platform updates the Intake Form Configuration Group using the settings you specified.

Configuring Examination Workflows

Civic Platform uses Workflow Tasks to track the successful completion of Examination requirements so that the professional license process can proceed to the next task. You assign the workflow process to the Application Type when you create the application; however, you must also assign it to the Examination process through the Record Setting tab of the Examination Maintenance portlet.

Assigning an Examination Workflow Task to a Record Type

Assigning a workflow task to Examinations takes place at the Record Type level. This setting instructs Civic Platform which workflow logic to use for a particular Record Type.

To assign an examination workflow task to a record type

1. Access the Examination Maintenance portlet ([Accessing the Examination Maintenance Portlet](#)).

2. Select the **Record Setting** tab.

Any Record Types you previously assigned a corresponding Workflow Task/Status Check display.

3. Click **Add** to add a new Record Type.

Civic Platform adds a blank line to the list.

4. Expand the **Record Type** navigation tree, and browse to locate the desired Record Type.
Civic Platform adds the selected record type to the Record Type list.
5. Expand the **Workflow Task/Status Check** navigation tree, and browse to locate the desired workflow task status.
6. From the **Record Status** drop-down list, select **Enabled** to activate this Record Setting.
7. Repeat steps 4 - 8 for each Record Type you need to associate with a Workflow Task.
8. Click **Submit**.

Civic Platform associates the listed Record Types with the specified Workflow Tasks.

Creating and Using Examination Subjects

Before using the Examination feature to track ongoing Examination requirements for Licensed Professionals, perform the following setup tasks:

- Verify you have created and enabled the necessary Examination Provider records, or create new Examination Provider records, if needed. See “Contacts and Licensed Professionals” in the *Accela Civic Platform User Guide*.
- Create and enable an examination subject containing information about the examination required to maintain or renew the specified Professional License.
- Associate the examination subject with the Examination Providers that offer the examination.
- Associate the examination subject with the examination providers that offer the examination. You can also do this in the examination provider (licensed professional) record. For complete information, see “Contacts and Licensed Professionals” in the *Accela Civic Platform User Guide*.

Complete those steps for each Examination Provider, examination subject, and Licensed Professional Record Type you need to track.

- [Creating an Examination Subject](#)
- [Searching for Examination Subjects](#)
- [Editing Examination Subjects](#)
- [Associating an Examination Subject with Examination Providers](#)
- [Associating an Examination with a Record Type](#)
- [Setting Email Reminders](#)

Creating an Examination Subject

Examination Subject contain information about the competency exams that the state requires for Licensed Professionals to obtain or maintain their license.

To create an examination subject

1. Access the Examination Maintenance portlet ([Accessing the Examination Maintenance Portlet](#)).
2. Click **New** to create a new examination subject.
Civic Platform displays the Examination detail portlet.

3. Complete the fields as described.

Examination Name	Enter a distinctive name for the Examination. For example, Registered Nurses are required to pass the National Council Licensure Exam, which is titled NCLEX-RN
Grading Style	Select an option from the drop-down list: Pass/Fail, Passing Score, Passing Percentage, or None. If you select Passing Score or Passing Percentage, an additional field displays, enabling you to enter the score/percentage required to pass the course.
Status	Enable or disable a continuing education record by selecting an option from the drop-down list.
Workflow Task/Status Check in ACA	Specify one or more workflow tasks or statuses that can enable public users to schedule such an examination in Citizen Access.
	 Note: This workflow restriction does not apply to agency users. Agency users can always schedule examinations on a record, regardless of the record's workflow status.
Template	Choose a default template to associate with the continuing education record. When you make a selection, the template (ASI/ASIT) fields display on the new continuing education form. You can enter data in the template fields or leave them blank. If you enter data, it becomes default data for those same fields when a user or citizen creates a new continuing education record with that associated template in Civic Platform or Citizen Access. If you leave any of the template fields blank, the fields are simply available for the user or citizen to use.
Comments	Enter any relevant comments about this examination record.

4. Click **Submit**.

Civic Platform creates the examination subject in the Examination Maintenance portlet.

Searching for Examination Subjects

You can Search the Examination Maintenance portlet for a specific examination subject.

To search for an examination subject

1. Access the Examination Maintenance portlet ([Accessing the Examination Maintenance Portlet](#)).
2. From the Examination Maintenance portlet, click **Search**.
Civic Platform displays a Search window.
3. Enter a portion of the desired examination subject name, and/or any other relevant information, and then click **Submit**.
Civic Platform displays a list of examination subjects that match the search criteria.
4. If the desired examination subject does not display, click **Search** again to retry your search using different search parameters.

Editing Examination Subjects

You can edit examination subjects through the Examination Maintenance portlet.

To edit an examination subject

1. Access the Examination Maintenance portlet ([Accessing the Examination Maintenance Portlet](#)).
2. From the Examination Maintenance portlet, select the examination subject you need to edit.
Civic Platform displays the examination subject in the Examination detail portlet.

3. Select one of the following tabs and edit the examination subject as necessary.

- **Examination tab** – to view or edit the details about the Examination, see [Creating an Examination Subject](#).
- **Providers tab** – to view, assign, or delete the Examination Providers associated with this Examination, see [Associating an Examination Subject with Examination Providers](#).
- **Record Types tab** – to view, assign, or delete the Record Types associated with this Examination, see [Associating an Examination with a Record Type](#).
- **Available Schedules** - lists the exam schedules defined in the examination provider (licensed professional) records. To schedule the exam, see “Contacts and Licensed Professionals” in the *Accela Civic Platform User Guide*. You can send email reminders to examinees of the selected examination schedules. See [Setting Email Reminders](#).

Associating an Examination Subject with Examination Providers

Because there are often multiple Providers that offer the same certification level examination, you can associate an examination subject with as many Providers as apply.

To associate an examination subject with examination providers

1. Access the Examination Maintenance portlet ([Accessing the Examination Maintenance Portlet](#)).
2. From the Examination Maintenance portlet, select the desired examination subject
Civic Platform displays the examination subject in the Examination detail portlet.
3. From the Examination detail portlet, select the **Providers** tab.
Any Providers already associated with this examination subject display.
4. To associate this record with another Provider, click **Assign**.
Alternatively, from the Examination Maintenance portlet, select the Examination names you need to associate with Providers, and then click **Assign > Assign Provider**.
Civic Platform displays a Search window.
5. Enter a portion of the desired Provider Name or Provider Number in the search field, and then click **Submit**.
Civic Platform displays a list of Providers that match the search criteria.
6. If the desired Examination Provider displays, select the Provider name and click **Submit**. If there are multiple providers for the Examination, you can select all that apply.
Civic Platform adds the provider to the list of Providers associated with the selected examination subjects.
7. If the desired Examination Provider does not display, click **Search** to retry your search using different search parameters.
8. If you cannot find the desired Examination Provider, refer to “Contacts and Licensed Professionals” in the Civic Platform Online Help for instructions on creating a new Examination Provider record or adding an existing Education or Continuing Education Provider to the Examination Provider list.

Associating an Examination with a Record Type

You can associate an examination subject with each of the Licensed Professional record types to which it applies.

To associate an examination with a record type

1. Access the Examination Maintenance portlet ([Accessing the Examination Maintenance Portlet](#)).
2. From the Examination detail portlet, select the **Record Types** tab.
Any Record Types already associated with this Education record display.
3. To associate this record with another Record Type, click **Assign**
Civic Platform displays the list of available Record Type categories.
4. Expand the Record Type to view subtypes within the category.
If you cannot locate the desired Record Type, click **Search**. Enter all or part of the Record Type alias in the Search Field and click **OK**. Note that the Search is case-sensitive. Civic Platform highlights any Record Types matching your search criteria, making it easier for you to view them in the list.
5. When you have located the desired Record Types, select the Record Type aliases and click **Submit**.
The Record Types you selected display on the list of Record Types associated with this examination subject.
6. To remove a Record Type, select the Record Type and click **Delete**.
Civic Platform removes the Record Type from the list of Record Types associated with this examination subject.

Setting Email Reminders

In the Available Schedules portlet, you can configure email reminders to auto-notify examinees of an upcoming examination. You can also configure email notifications to auto-send to exam proctors, notifying them of a pending proctor exam assignment or about removing them as a proctor. When proctors receive a notification of pending assignment, they can click an Accept or a Reject link embedded in the email. Civic Platform uses this response to update the proctor assignment status.

When you set up a reminder, a batch job is auto-created to auto-generate and send out the notification emails as specified. You can further configure the batch job to run one time only, or at regular intervals. For information on how to work with Batch Jobs, see [Working with Batch Jobs](#).

As a prerequisite to this feature, you must do the following before you set the email reminder.

- Create a notification template. See [Notification Templates](#) .
- Create an EMSE script named AUTO_GENERATE_EMAIL_Reminder for examinees or the ProctorAssignedAfter and ProctorUnassignedAfter for proctor notification.
- To access sample scripts, go to the Help & Training page on Accela's Success Community. Contact Accela Customer Support for further assistance.



Note:

Contact an Accela Implementation specialist or a system administrator who has received training from an Accela Implementation specialist to review the script you must run to implement this feature. Improperly written scripts can seriously damage your system by incorrectly altering or deleting data for many records. For information on writing and implementing scripts, see the Accela Civic Platform Scripting Guide.

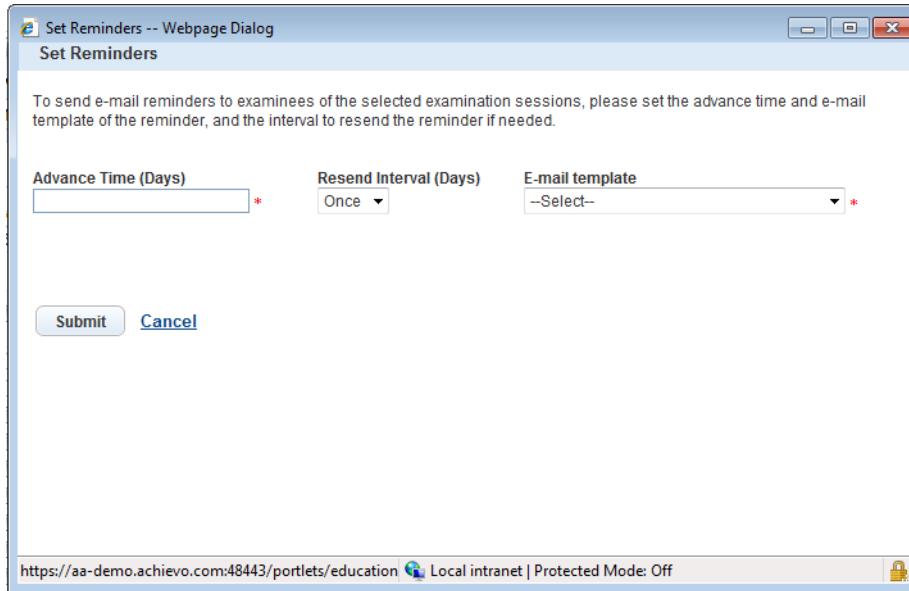
To set up an email reminder

1. Access the Examination Maintenance portlet ([Accessing the Examination Maintenance Portlet](#)).
2. From the Examination Maintenance portlet, click the examination name.
Civic Platform displays the examination detail portlet.
3. Click the **Available Schedules** tab.

4. Select one or more desired exam sessions for which you want to send reminder emails.

5. Click **Set Reminders**.

Civic Platform displays the Set Reminder window.



License Renewal

The Licenses module of Civic Platform uses most of the same features as other modules in Civic Platform. In addition to the functions available in other modules, however, this module has some unique functions. These include determining renewal requirements for business licenses and adding or editing application types.

Click a topic title below for full details.

Related Information

[Managing the License Renewal Lifecycle](#)

[Managing Expired Licenses and Insurance Lapses](#)

[Establishing Renewal Information](#)

[Managing Application Types](#)

Managing the License Renewal Lifecycle

Topics

[Configuring License Renewal](#)

[Understanding Civic Platform's License Renewal Life Cycle](#)

Configuring License Renewal

To configure renewal functionality, define the expiration code, the renewal record type, and the workflow associated with the renewal process, 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 configure record types, see [Creating and Configuring Records](#). Some licenses require a specified number 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 configure the renewal process with continuing education and examination, see [Managing Continuing Education](#) and [Managing Examinations](#).

If your agency uses Citizen Access, administrators must perform the following tasks:

- Configure specific fee item settings for Citizen Access Input Required, Auto Assess, and Auto Invoiced. For information on fees for Citizen Access, see “Configuring Fees and Online Payments” in the *Citizen Access Administrator Guide*.
- Configure online payment processing to enable the ability to receive payments online.
- Customize the associated web pages.
- Depending on your implementation, you might need to approve a license associated with a public user through the Public User portlet in Civic Platform. For information on license approval in the Public User portlet, refer to [Managing Contacts, Licensed Professionals, and Public Users](#).

For complete information on how to configure license renewals in Citizen Access, see “License Verification and Online Renewal” in the Citizen Access Administrator Guide.

To configure license renewal

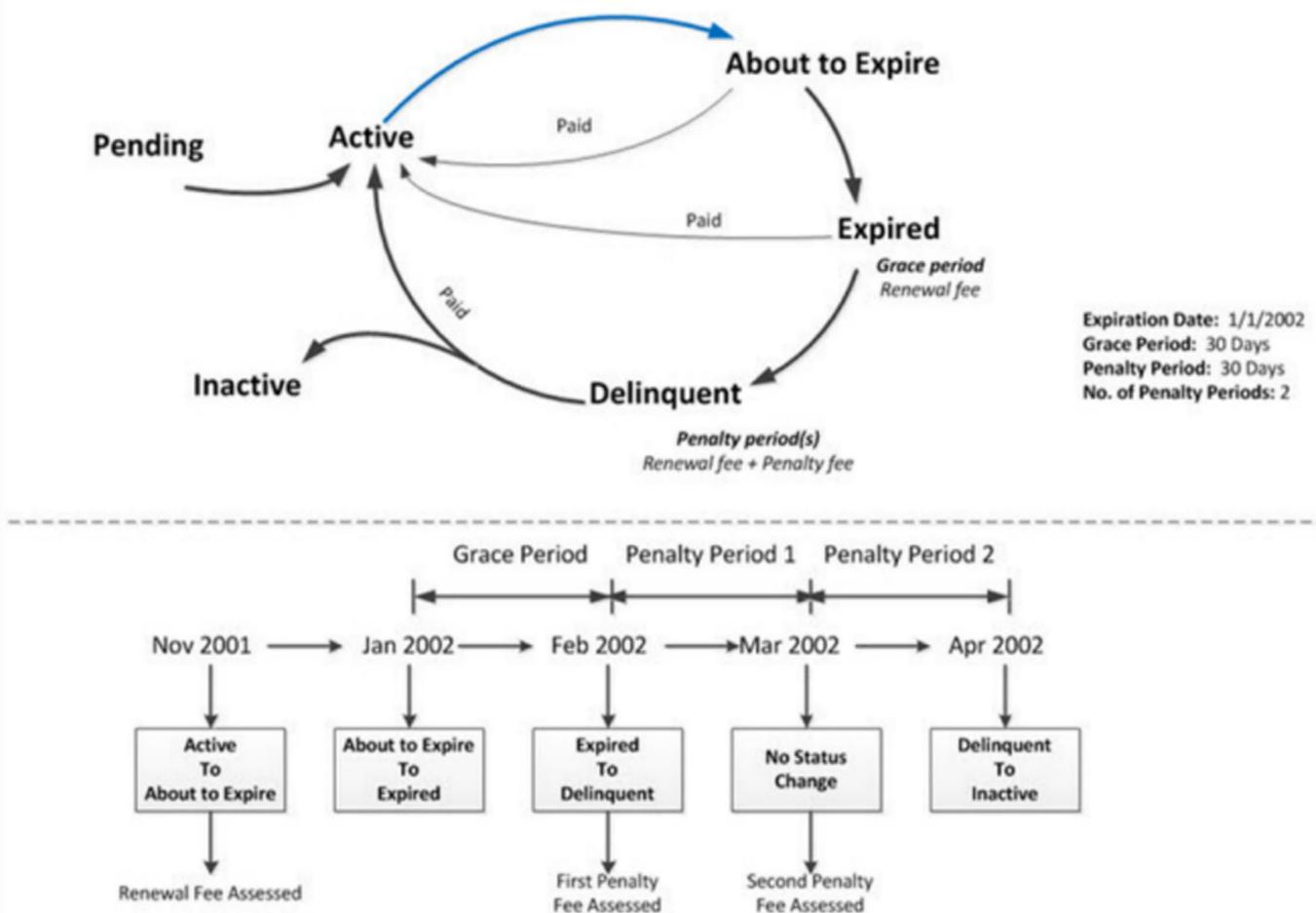
1. If necessary, log in to Civic Platform.
Civic Platform displays your personalized home page.
2. Create an expiration code for the renewal process. Civic Platform assigns this expiration code to the renewal record type. For additional instructions about expiration codes and renewal processes, refer to [License Renewal](#).
3. Define the record types for the parent license records and the child renewal records. For instructions on how to configure Record Type information, refer to [Creating and Configuring Records](#).
Verify the record type has the following list of supporting record type configurations defined and assigned:
 - Renewal option
 - Renewal Record Type
 - Fee Schedule
 - Expiration Code
 - Applicable Workflow
 - Intake Form Configuration Group
 - Custom Fields Group Code

4. For Civic Platform users: If your agency implements continuing education and examinations, refer to [Configuring Continuing Education](#) and [Configuring Examinations](#) for setup instructions.

For Citizen Access users: If your agency implements continuing education and examinations in Citizen Access, refer to “Certifications and Education” in the Citizen Access Administrator Guide for setup instructions.

If your agency implements license renewal in Citizen Access, you must define fee items with special fee item settings for Citizen Access renewals and perform additional configurations in Citizen Access Admin to enable functionality. Refer to “License Verification and Online Renewal” in the Citizen Access Administrator Guide for setup instructions.

Understanding Civic Platform's License Renewal Life Cycle



Automated License Renewal Statuses

An agency administrator or an Accela Delivery 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

An Accela Delivery team member can help you maintain the scripts used to update your license renewal statuses.

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. This enables agencies to enforce non-renewal for expired records and collect fees for penalties. 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 – or contact the Accela Delivery team – to modify the script used for automatically changing the license statuses in your Accela implementation from Active to About to Expire, Expired, or Delinquent.

 **Note:** Modifying scripts must only be done by a qualified administrator or Delivery team member trained in Accela EMSE Scripting.

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.
Using the sample diagram above as a guide, specify any grace and/or penalty periods you want to use for license renewal status updates.
3. Refer to the Accela Civic Platform Scripting Guide for full details about modifying scripts.

Managing Expired Licenses and Insurance Lapses

Topics

- [Defining Record Type and License Type Expiration Settings](#)
- [Configuring Expired License Notifications](#)

Defining Record Type and License Type Expiration Settings

Go to the license verification portlet and define the insurance/license type relationships with record types.

To define record type and license type expirations

1. Access the License Verification Maintenance portlet ([Navigating to the Setup Portlet](#)).

2. Create a new record type and license type relationship. Click **New**.

Civic Platform creates a new row so you can define a record type relationship.

Record Type *	Licensed Professional Type *	Allow Expired License *	Allow Expired Insurance *	Allow Expired Business License *
<input type="checkbox"/> Building/Boiler/NA/NA	Construction Blaster	None	None	None
<input type="checkbox"/>	----Select----	None	None	None

3. Complete each field as defined in [Table 203: License Verification Maintenance Fields](#)

4. Click **Submit**.

Table 203: License Verification Maintenance Fields

Record Type	Click the picker icon to search and select the record type you want to define.
License Type	Use the drop-down menu to search and select the license type you want to associate with the record type.
Allow Expired License	Use the drop-down menu to define the permissions for the license expiration on the record type. You can choose For Civic Platform, For ACA, For Both, or None. If you choose None, you restrict licensed professionals with an expired license from the record type.
Allow Expired Insurance	Use the drop-down menu to define the permissions for the insurance expiration on the record type. You can choose For Civic Platform, For ACA, For Both, or None. If you choose None, you restrict licensed professionals with an expired insurance from the record type.
Allow Expired Business License	Use the drop-down menu to define the permissions for the business license expiration on the record type. You can choose For Civic Platform, For ACA, For Both, or None. If you choose None, you restrict licensed professionals with an expired business license from the record type.

Configuring Expired License Notifications

To enable notification functionality, you must define the record type and license type expiration relationship in the License Verification Maintenance portlet as described in [Defining Record Type and License Type Expiration Settings](#).

Maintain the email notification list by setting up a batch job that scans Civic Platform for expired licenses, business licenses, and insurance.

After collecting the expiration data, Civic Platform sends an email notification to the stakeholder associated with the license, business license, or insurance. You must customize the content of the email notification EMAIL_NOTICE_LICENSE_EXPIRED. For information on how to customize the content of emails, see [Working with Communication Manager](#).

To enable expired license and insurance notifications

1. Log in to Civic Platform
2. Define the record type and license type expiration settings. See [Defining Record Type and License Type Expiration Settings](#)
3. Customize the subject and content of the related email. For complete instructions, see [Working with Communication Manager](#).
 - EMAIL_NOTICE_LICENSE_EXPIRED SUBJECT
 - EMAIL_NOTICE_LICENSE_EXPIRED CONTENT

- Define a batch job for collecting a list of email addresses associated with expired licenses in the software. Civic Platform sends an email notification to that list. For information about creating this batch Job, see [Processing Batch Jobs](#).

Enabling Supervisor Override for Expired Licenses

Supervisors can override the mechanism in Civic Platform that prevents citizens from renewing licenses when they have outstanding fees. For example, a citizen might have outstanding fees when they come to the agency to renew their license. If they pay the fees and submit proof of payment to the cashier, a supervisor can enter their username and password to enable the renewal of the license in real-time.

Audit logs capture the following data when a supervisor override is performed: supervisor name, date, reason for override, cashier name, and renewal record ID.

See the following sections for instructions on implementing this feature.

[Designating the Supervisor Role in the User Profile](#)

[Modifying Renewal Record Types to Enable Supervisor Override](#)

[Using the Supervisor Override Feature](#)

Designating the Supervisor Role in the User Profile

To enable this feature, you must designate a user as a supervisor. This user can enter their password on the override screen in Civic Platform to enable a renewal record to be processed when a citizen provides proof of payment for outstanding fees.

To designate a user as a supervisor:

- Access the Classic Administration page.
- Select **User Profile > User**.
- Search for the user you want to modify.
- On the User - Edit page, select **Supervisor**.

The screenshot shows the 'User - Edit' form in the Civic Platform. At the top, there is a navigation bar with tabs: Agency Profile, User Profile, Application, People, Property, Fees, Inspection, Condition, Workflow, Calendar, and Help. Below the navigation bar, the title 'User - Edit' is displayed, followed by the sub-instruction 'Use this form to edit User.'

The form fields include:

- User Login ID:** DEMO_SUPERVISOR
- New Password:** [Empty input field]
- Confirm Password:** [Empty input field]
- Distinguished Name:** [Empty input field]
- User Name:** First: Demo, Mi: M, Last: Supervisor
- Supervisor:** (This checkbox is highlighted with a red border.)
- Initials:** [Empty input field]
- Display Initials in ACA:**
- Title:** [Empty input field]
- Employee ID:** [Empty input field]
- Email:** [Empty input field]
- Mobile Phone:** [Empty input field]
- Preferred Channel:** [Dropdown menu showing 'IVR User Number: 000025503']
- IVR User Number:** 000025503
- IVR Pin Number:** [Empty input field]

- Click **Save**.

Modifying Renewal Record Types to Enable Supervisor Override

To enable this feature, modify your renewal record types to allow supervisor override, as shown

To enable supervisor override:

- Navigate to Record Type Administration, as follows:
 - In the new UI, go to **Accela Administrator > Administration > Administration > AA Admin**.
 - In V360, click the **V360 Admin** main link, then navigate to **Administration > AA Admin**.
 Civic Platform displays a link to Record Type Administration in the navigation panel on the left.
- Click **Record Types** and then navigate to your renewal record types.
- Select **Enable Supervisor Override**.

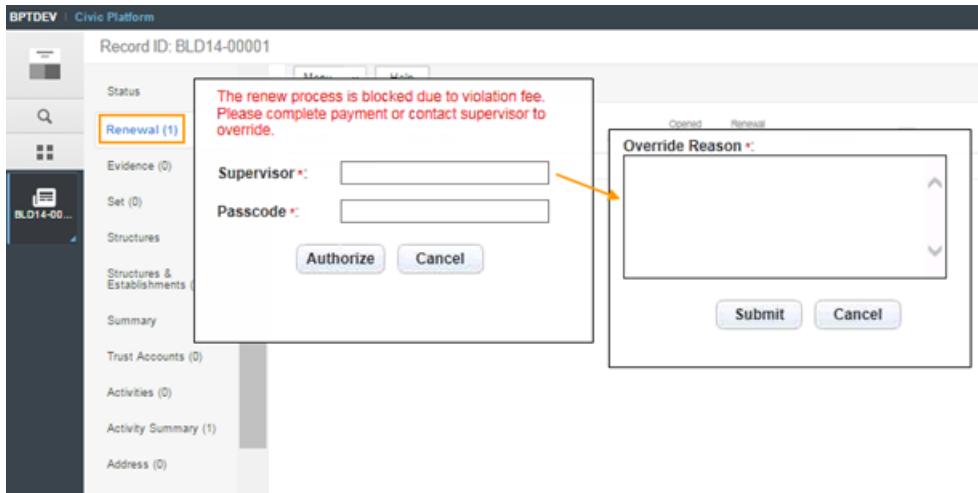
The screenshot shows the 'Settings' tab of the Accela Citizen Access Record Type Administration page. The 'Enable supervisor override' checkbox is checked and highlighted with a red border. Other settings visible include IVR Number, Status (Enable selected), Searchable, As Child Only, Duration, and various access-related checkboxes like 'Searchable' and 'As Child Only'. A sidebar on the left shows record type details: Group: Building, Type: Demo, Sub-Type: Renew, Category: Parent, Enabled for Accela Automation, Disabled for Accela Citizen Access, and Last Updated: Apr 29 2016 01:45. The bottom navigation bar has tabs for Summary, Settings (selected), and Other Associations.

- Click **Save**.

Using the Supervisor Override Feature

After you configure the record type and the user profile, you can use the feature.

- Click the **Renew** button for a record. If the record has outstanding fees, the following screens display:



- Supervisor enters their username and password, then clicks **Authorize**.
- Supervisor enters an override reason, then clicks **Submit**.

The renewal record is created.

Establishing Renewal Information

Setting up renewal information enables you to determine the expiration date, renewal process and penalty periods for business licenses. After you configure the renewal information, you can associate the expiration code that identifies the renewal process with a certain application type. Any new business license of that type follows the renewal process that you set up. You can update an existing renewal process as well as copy a renewal process to create a new one.

Topics

- [Creating a Renewal Process](#)
- [Searching for a Renewal Process](#)
- [Editing a Renewal Process](#)
- [Copying a Renewal Process](#)

Creating a Renewal Process

When you create a renewal process, you establish the expiration code to identify the process as well as the expiration period, grace period, and penalty period intervals. In addition to setting up these intervals, you determine the fee function to use during batch processing to process licenses with this renewal process.

**Note:**

You can also manually create renewal information, workflow status, and fees for an individual license after you issue the license.

To create a renewal process

- Access the Classic Administration page ([Accessing Classic Administration](#)).

- Choose **Application > Renewal Info**.

Civic Platform displays the Find Expiration Code—Search page.

Find Expiration Code - Search

Use this form to search or add Expiration Code.

Expiration Code:	<input type="text"/>
Description:	<input type="text"/>
Status:	<input checked="" type="radio"/> All <input type="radio"/> Enable <input type="radio"/> Disable
<input type="button" value="Submit"/> or <input type="button" value="Add"/>	
New Expiration Code	

- Click **Add**.

Civic Platform displays the Expiration Code—Add page.

Expiration Code - Add

Use this form to add new Expiration Code.

Expiration Code * :	<input type="text"/>
Description * :	<input type="text"/>
Initial Expiration Method * :	<input type="button" value="FIXED DATE"/>
Expiration Date:	JAN <input type="button" value="31"/>
Expiration Interval * :	<input type="text"/> Days <input type="button" value="Days"/>
Grace Period Interval:	<input type="text"/> Days <input type="button" value="Days"/>
Penalty Interval:	<input type="text"/> Days <input type="button" value="Days"/>
Number of Penalty Periods:	<input type="text"/>
Renewal Fee Function:	<input type="button" value="SIMPLE_RENEWAL_FEE"/>
Renewal Fee Code:	<input type="button" value="NONE"/>
Penalty Fee Function:	<input type="button" value="PERCENTAGE_PENALTY_FEE"/>
Penalty Fee Code:	<input type="button" value="NONE"/>
Pay Period Group:	<input type="button" value="NONE"/>
Status:	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

- Complete the necessary fields as described in [Expiration Code Fields](#).

- Click **Submit**.

Civic Platform saves the renewal process.

Table 204: Expiration Code Fields

Expiration Code	Enter a short, descriptive name to identify this renewal process so users can easily locate the appropriate expiration code.
Description	Enter a description to identify what the renewal process does. For example, enter "Applies to quarterly renewal fee."

Initial Expiration Method	Select the method you want to use to calculate expiration dates. To enable a fixed expiration date, choose "Fixed Date." To generate an expiration date based on the application's initial filing date, choose "Filed Date."
Expiration Date	If you chose Fixed Date in the Initial Expiration Method field, use this drop-down list to choose the month and date when the license expires. Every license with this expiration code expires on this day.
Expiration Interval	Enter the number of days or months that a license remains active before expiring, then specify the date unit (days or months) from the drop-down list. For example, to enable an expiration interval of 2 months, enter "2" in the first field and choose "Months" from the drop-down list.
Grace Period Interval	Enter the number of days or months between the time that the license expires and the first penalty period, then specify the date unit (days or months) from the drop-down list. For example, to enable a grace period of 10 days, enter "10" in the first field and choose "Days" from the drop-down list.
Penalty Interval	Enter the number of days or months that each penalty period lasts, then specify the date unit (days or months) from the drop-down list. After the penalty interval, a subsequent penalty period can begin depending on the number of penalty periods you specify in the Number of Penalty Periods field.
Number of Penalty Periods	Enter the number of penalty periods that can pass before a license becomes inactive. For each penalty period, you might need to assess an additional penalty fee.
Renewal Fee Function	Select the function you want to use to generate the renewal fee. Run this function within the License batch process. Choose "None" if there is no renewal fee.
Renewal Fee Code	Select the code for the fee item you want to use to calculate the renewal fee.
Penalty Fee Function	Select the function you want to use to generate the penalty fee. Run this function within the License batch process. Choose "None" if there is no penalty fee.
Penalty Fee Code	Select the code for the fee item you want to use to calculate the penalty fee.
Pay Period Group	Select the payment period group you want to use for this renewal process. For any license that follows this renewal process, Civic Platform assesses only fees that belong to a payment period within this group. For example, you can configure a "2013" payment period within the Retail License payment period.
Status	If you want to start using this renewal process, click "Enable"; otherwise, click "Disable."

Searching for a Renewal Process

To review, update, or copy an existing expiration code, you must first search for it.

To search for a renewal process

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose **Application > Renewal Info**.
Civic Platform displays the Find Expiration Code—Search page.
3. Complete the necessary fields as described in [Expiration Code Fields](#).
4. Click **Submit**.
Civic Platform displays a list of all expiration codes that match your search.

Editing a Renewal Process

After you add a renewal process to Civic Platform, you might need to change some details about it, such as the expiration interval or the fee function used to assess penalty fees. Any changes that you make here do not affect existing licenses.



Note:

You cannot change the expiration code or delete the renewal process because existing business licenses can reference them.

To edit a renewal process

1. Search for an expiration code. For instructions, see [Searching for a Renewal Process](#).
2. Click the red dot next to the expiration code you want.
Civic Platform displays the Expiration Code—Edit page.

[Expiration Code - Edit](#)

Use this form to edit or copy Expiration Code.

Expiration Code:	LIC_ELEVATOR
Description * :	ELEVATOR LICENSE
Initial Expiration Method * :	FIXED DATE
Expiration Date:	MAR 31
Expiration Interval * :	12 Months
Grace Period Interval:	0 Days
Penalty Interval:	0 Days
Number of Penalty Periods:	0
Renewal Fee Function:	SIMPLE_RENEWAL_FEE
Renewal Fee Code:	NONE
Penalty Fee Function:	PERCENTAGE_PENALTY_FEE
Penalty Fee Code:	NONE
Pay Period Group:	NONE
Status:	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
<input type="button" value="Save"/> <input type="button" value="Copy"/> <input type="button" value="Cancel"/>	

3. Complete the necessary fields as described in [Expiration Code Fields](#).
4. Click **Save**.
Civic Platform saves the expiration code.

Copying a Renewal Process

Instead of adding a new renewal process, you can copy an existing process and change the expiration code, description, intervals, and other details.

To copy a renewal process

1. Search for a expiration code. For instructions, see [Searching for a Renewal Process](#).
2. Click the red dot next to the expiration code you want.
Civic Platform displays the Expiration Code—Edit page.
3. Click **Copy**.
Civic Platform displays the Expiration Code-Add page with the same values as the first expiration code.

Expiration Code - Add

Use this form to add new Expiration Code.

Expiration Code * :	LIC_ELEVATOR
Description * :	ELEVATOR LICENSE
Initial Expiration Method * :	FIXED DATE
Expiration Date:	MAR 31
Expiration Interval * :	12 Months
Grace Period Interval:	0 Days
Penalty Interval:	0 Days
Number of Penalty Periods:	0
Renewal Fee Function:	SIMPLE_RENEWAL_FEE
Renewal Fee Code:	NONE
Penalty Fee Function:	PERCENTAGE_PENALTY_FEE
Penalty Fee Code:	NONE
Pay Period Group:	NONE
Status:	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

4. Complete the necessary fields as described in [Expiration Code Fields](#).

5. Click **Submit**.

Civic Platform saves the new renewal process.

Managing Application Types

Application types let you organize the complex processes, inspection tasks, and any other important information required to issue a permit or license. Each time a user wants to perform a daily task in Civic Platform, such as schedule an inspection, the user must search for an existing application or create a new application.

The application type determines what information users must provide for a new application, such as information about a billing contact. It also dictates any activities that a user can perform for an existing application, such as assessing certain fees or completing certain workflow tasks.


Note:

After a user creates a new application, they cannot change the application type. You can edit an application type as well as any components associated with it, such as workflow processes, but those changes do not affect existing applications.

Topics

- [Adding an Application Type](#)
- [Editing an Application Type](#)

Adding an Application Type

When you set up an application type, you specify the components of the application, such as the fee schedule, the inspection group, and the workflow process.

You also determine the type of contact, licensed professional, owner, parcel, and address information associated with the application. You set up these details in the Intake Form Configuration Group associated with the application type.

If you require additional information about a specific application, you can add custom fields to the application type. You set up these details in the Application Specific Information group associated with the application type.

Before you create a new application type, you set up the fee schedules, the inspection lists, and the workflow processes. You also set up the application specific information, Intake Form Configuration, and document group codes. Keep in mind that you can add this information later, also, when you edit the application type.

To add an application type

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Application > App Type.

Civic Platform displays the Application Type page.



3. Select the group to which you want to add a type.
4. Click **Add**.

Civic Platform displays the Application Type—Add page.

Application Type - Add

Group:	AMS	
Type * :	<input type="text"/>	Select
Subtype * :	<input type="text"/>	Select
Category * :	<input type="text"/>	Select
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>		

5. Complete these fields:

Type	Enter the application type. You can also click Select to choose a pre-defined type.
Subtype	Enter the application subtype. You can also click Select to choose a pre-defined subtype.
Category	Enter the application category. You can also click Select to choose a pre-defined category.

6. Click **Submit**.
- Civic Platform displays the Application Type—Add Detail page.

Application Type - Add Detail

Use this form to complete creation of new Application Type.

Would you like this permit to be available through VelocityHall? * Yes No

Enable Renewal Also Enable Issuance

Renewal CAP Type * : AMS/ACA/carol/Application

Group: AMS

Type: ALM

Subtype: Asset

Category: District

Application Type Alias:

Status: Enable Disable

Searchable

Fee Schedule * : AA_NOCHRG

Application Type Icon: [Browse...](#)

Enforcement Type:

Inspection Group Name:

Workflow * : 720FP4

Application Spec Info Group Code:

SmartChoice Group Code * : 1998

Page Flow Code For ACA: OMeditMultipleContacts

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:

Document Code For ACA:

Application Status Group Code:

Address Type Group Code:

Default CAP Status:

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:

Virtual Folder Group:

[Submit](#) [Cancel](#)

7. Enable for ACA: If you use Citizen Access, specify the following.

- **Enable Application:** Click this option to allow Citizen Access users to submit this type of application online.
- **Also Enable Issuance:** If you specify Enable Application, you have the additional option to approve and issue the application type through Citizen Access.
- **Enable Fee Estimation:** You must enable FID 0244 for this option to become available. Click this option if you want to allow users to create a partial application in Citizen Access that includes a calculation of estimated fees. Civic Platform does not count partially completed applications as regular permit applications.



Note:

This option only applies to record types that you specify as "available for fee estimation." For instructions on making record types available for fee estimation, see [Enabling Fee Estimation](#).

8. Complete the necessary fields as described in [Permit Application Type Fields](#).

9. Click **Submit**.

Civic Platform adds the application type to Civic Platform.

Table 205: Permit Application Type Fields

Status	If you want to start using this application type in Civic Platform, select “Enable”; otherwise, select “Disable.”
Category Code	Enter a unique three-character code to identify this application category. Civic Platform appends this code as a prefix to any new applications in this category.
Fee Schedule	Select a pre-defined fee schedule.
Inspection Group Code	Select a pre-defined inspection group code.
Workflow	Select a pre-defined workflow process code.
App Specific Info Group Code	Select a pre-defined application specific information group code.
Intake Form Configuration Group Code	Select a pre-defined Intake Form Configuration Group code.
Email for Hearing Notification	Enter the email address for the individual responsible for attending hearings. Hearing notifications and changes to hearing schedules go to this email address.
Expiration Code	Choose an expiration code from the drop-down list. Your agency defines these values.
Document Code	Select a default document code and document type. Your agency defines document codes and document types; see Managing Documents for Attachments .
Appl Status Group Code	Enter the code that applies to the specific status group you want to access. For more information, see Working with Application Status Groups .

Editing an Application Type

After you set up an application type, you might need to make changes to it. You can change any of the components associated with the application type. For example, you can associate a new fee schedule with an existing application type. You can also change the application type, subtype, or category name. Civic Platform requires this for historical reference purposes.

To edit an application type

1. Access the Classic Administration page ([Accessing Classic Administration](#)).
2. Choose Application > App Type.
Civic Platform displays the Application Type page.
3. Select the application type, subtype, and category that you want to change.
Civic Platform displays all four application type levels.



Note:

You must select all application type levels to edit the type.

4. Click Edit.
Civic Platform displays the Application Category—Edit window.

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/ALM/ALM/ALM

Group: Building
Type: ALM
Subtype: ALM
Category * : Manual ALM (Cannot edit; Application already created with this category name)

Application Type Alias:

Status: Enable Disable
 Searchable

Fee Schedule * : TST EDU

Application Type Icon: Browse...

Enforcement Type:

Inspection Group Name:

Workflow * : BLDG_WM

Application Specific Info Group Code:

SmartChoice Group Code * : CE SMARTCHOICES

Page Flow Code For ACA: OMeditMultipleContacts

eMail For Hearing Notification:

Expiration Code: RENEWA CODE

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:

Document Code For ACA:

Application Status Group Code:

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

5. Enable for ACA: If you use Citizen Access, specify the following.

- **Enable Application:** Click this option to allow Citizen Access users to submit this type of application online.
- **Also Enable Issuance:** If you specify Enable Application, you also have the option to approve and issue the application type through Citizen Access.
- **Enable Fee Estimation:** You must enable FID 0244 for this option to become available. Click this option if you want to allow users to create a partial application in Citizen Access that includes a calculation of estimated fees. Civic Platform does not count partially completed applications as regular permit applications.

**Note:**

This option only applies to record types that you specify as “available for fee estimation.” For instructions on making record types available for fee estimation, see [Enabling Fee Estimation](#).

6. Complete the necessary fields as described in [Permit Application Type Fields](#).**7. Click **Save**.**

Civic Platform saves the changes to the application type.

Part 11: System Diagnostics

Civic Platform provides functions specific to GIS integration diagnostics.

Related Information

[Accela GIS Integration Diagnostics](#)

Accela GIS Integration Diagnostics

Civic Platform provides diagnostic tools that enable you to troubleshoot legacy Accela GIS integration issues in these areas:

- Communication between Civic Platform and the legacy Accela GIS
- Data linking between Civic Platform and the legacy Accela GIS, namely, the association between assets and GIS objects, between parcels and GIS objects, and between records and GIS objects.
- Auto-populating application-specific information into the application intake form
- Auto-assigning inspectors when users schedule inspections
- Parameters in the legacy Accela GIS related EMSE scripts

When legacy Accela GIS diagnoses an issue, it displays a diagnosis result that lists the specific problem, possible cause of the problem, and a troubleshooting suggestion for possible solutions to resolve the problem. If the troubleshooting suggestion does not resolve the problem, contact Accela Customer Support.

To diagnose Civic Platform GIS (JavaScript version), go to the Diagnostics page of the Civic Platform GIS Administration Site. For details about the Civic Platform GIS Diagnostics page, see the Civic Platform GIS System Administration in *Accela Civic Platform GIS Administrator Guide*.

For information about legacy Accela GIS diagnostics, click a topic below for full details.

Related Information

[Troubleshooting the Connection with GIS](#)

[Troubleshooting Data Linkage](#)

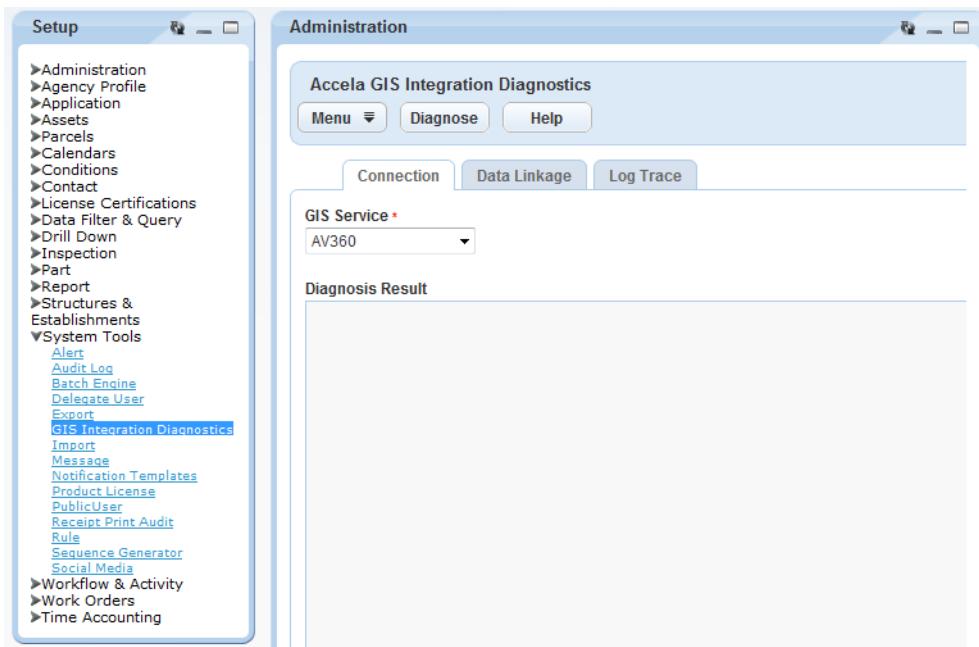
[Creating a Trace Log](#)

Troubleshooting the Connection with legacy Accela GIS

The Connection diagnostic tool can diagnose the most common issues on the connection with the legacy Accela GIS Server and offer solutions for you to troubleshoot the issues. For example, it checks whether Civic Platform can communicate with the legacy Accela GIS server successfully and whether the GIS Service settings are correct.

To troubleshoot the connection with legacy Accela GIS

1. Access the Accela GIS Integration Diagnostics Portlet ([Accessing the the legacy Accela GIS Integration Diagnostics Portlet](#)).
2. Click the **Connection** tab.
Civic Platform displays the Connection diagnostic tool.



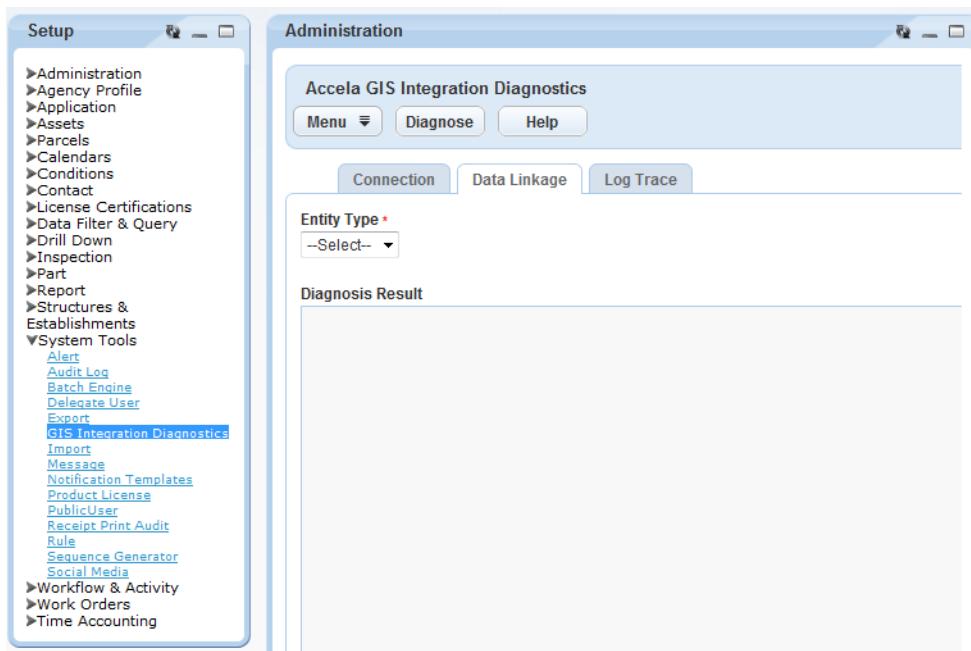
3. Select the GIS service that you want to diagnose from the GIS Service drop-down list.
 4. Click the **Diagnose** button.
- Civic Platform tries to establish a connection with the selected GIS service and displays the diagnosis result.

Troubleshooting Data Linkage

The Data Linkage diagnostic tool applies to legacy Accela GIS and examines whether there are any issues in the association between assets and GIS objects, between parcels and GIS objects, or between records and GIS objects. This diagnostic tool also offers solutions for you to troubleshoot any issues.

To troubleshoot the data linkage

1. Access the Accela GIS Integration Diagnostics Portlet ([Accessing the the legacy Accela GIS Integration Diagnostics Portlet](#)).
 2. Click the **Data Linkage** tab.
- Civic Platform displays the Data Linkage diagnostic tool.



3. Select the type of entity for which you want to check the data linkage from the Entity Type drop-down list. There are three options in this drop-down list: Asset, Parcel, and Record.

Civic Platform displays the fields according to the entity type you selected.

4. Complete the fields that appear:

- For assets

Asset Group Select the group of the asset that you want to diagnose.

Asset Type Select the type of the asset that you want to diagnose.

Asset ID Enter the identification number of the asset that you want to diagnose.

- For parcels, enter the parcel number in the Parcel # field.

- For records, enter the record identification number in the Record ID field.

5. Click the **Diagnose** button.

Civic Platform examines any legacy Accela GIS object that has an association with the selected entity, and then displays the diagnosis.

Creating a Trace Log

The Log Trace tool enables you to create a log of traces when you are troubleshooting problems in these areas:

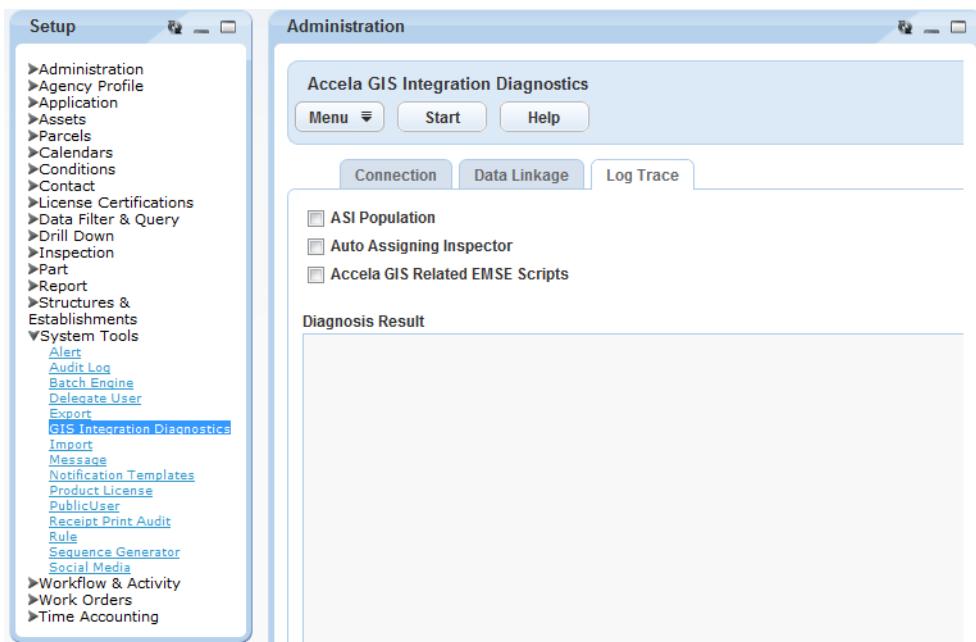
- Auto-populating application-specific information into the application intake form
- Auto-assigning inspectors when users schedule inspections
- Parameters in the legacy Accela GIS related EMSE scripts

To create a trace log

1. Access the Accela GIS Integration Diagnostics Portlet ([Accessing the legacy Accela GIS Integration Diagnostics Portlet](#)).

2. Click the **Log Trace** tab.

Civic Platform displays the Log Trace tool.



3. Select the areas for which you want to enable tracing:

- ASI Population
- Auto Assigning Inspector
- GIS Related EMSE Scripts

4. Click the **Start** button.

Civic Platform turns on tracing.

5. Ask the user who reported the issue to reproduce the issue on his or her site.

You can also reproduce the issue on your own, if possible.

6. When the user reproduced the issue, click the **Stop** button on the Log Trace tool.

Civic Platform turns off tracing and displays trace information in the Diagnosis Result area.

Important 9.0.0+ Security Information – Action Required

Starting with version 9.0.0, Civic Platform applications implement SHA-2 password encryption to comply with the Federal Information Security Management Act (FISMA) information security requirements.

Civic Platform applications have replaced SHA-1 password encryption with [SHA-2 encryption](#) (specifically, SHA-512+SALT hash functions) for FISMA compliance. When logging in Civic Platform, the user's password is automatically converted to the SHA-2 encryption.

The following Civic Platform applications use the SHA-2 password encryption:

- Civic Platform back-office application
- Citizen Access
- Silverlight and JavaScript GIS
- Accela mobile apps using the Automation REST API
- Apps using Construct V4 API



Note: Accela Mobile Office does not currently support SHA-2 password encryption.

Disabling SHA-1 on Accela-hosted Civic Platform environments

At a post-9.0.0 to-be-announced date, Accela-hosted environments will officially migrate to SHA-2 encryption. At that point, Accela will disable SHA-1 encryption so that only SHA-2 passwords are used across Civic Platform applications on the Accela-hosted environments.

Accela Customer Support will send out advanced notifications about the SHA-2 migration, and will ask all Civic Platform users to log into their Civic Platform applications before SHA-1 is disabled.



All users must log into their Civic Platform applications before Accela disables SHA-1. If users do not log into their Civic Platform applications before Accela disables SHA-1, their passwords will continue to use the SHA-1 password encryption and they will be permanently locked out of Civic Platform.

When Accela Customer Support has officially announced the SHA-2 migration date, it is absolutely important and mandatory for all Civic Platform 9.0.0+ users on an Accela-hosted environment to login before Accela disables SHA-1.

Disabling SHA-1 on self-hosted Civic Platform environments

The following information describes how to disable the SHA-1 password encryption on a self-hosted Civic Platform environment. Note that this information only applies to self-hosted (or "on-premise") customers who intend to completely migrate their Civic Platform environment from SHA-1 to SHA-2 password encryption.

If your self-hosted agency decides to disable SHA-1 encryption and only use the SHA-2 password encryption with Civic Platform, the following needs to happen after upgrading Civic Platform from a release prior to 9.0.0:

1. Plan the SHA-2 migration date.

The self-hosted agency must determine a SHA-2 migration date that gives enough time for all Civic Platform users to log in Civic Platform 9.0.0+ (including Civic Platform, Citizen Access, and GIS applications and administration sites, Accela mobile apps, and any app using Construct APIs). Send out advanced notifications and reminders to ensure all Civic Platform users have logged in Civic Platform in a timely manner.

2. All users MUST log into their Civic Platform 9.0.0+ application.

When users log into a Civic Platform 9.0.0+ application, their passwords are automatically converted to SHA-2 encryption.



All users must log into their Civic Platform 9.0.0+ applications before you disable SHA-1 on your Civic Platform environment. If users do not log into their Civic Platform 9.0.0+ applications before you disable SHA-1, their passwords will continue to use the SHA-1 password encryption and they will be permanently locked out of Civic Platform.

If your agency plans to disable SHA-1, it is absolutely important and mandatory for all Civic Platform 9.0.0+ users on your self-hosted environment to login before you disable SHA-1.

3. Disable SHA-1 encryption.

To disable the SHA-1 encryption for the following Civic Platform applications:

- **Civic Platform and Citizen Access:**

1. Connect to the Civic Platform database.
2. Execute the following SQL:

```
UPDATE R1SERVER_CONSTANT SET REC_STATUS = 'A' WHERE SERV_PROV_CODE =
'STANDARDDATA' AND CONSTANT_NAME = 'DISABLE_SHA_1'
```

- **Civic Platform Silverlight GIS:**

1. Navigate to the `inetpub\wwwroot\<agis>\data\GlobalConfigs` directory on the IIS server.
2. Edit the `GlobalSettings.xml` file.
3. Set the `DisableSHA1` key to `True`. For example:

```
<GlobalSettings>
  <add key="DisableSHA1" value="True"
</GlobalSettings>
```

(Note that by default, `DisableSHA1` is set to `False`.)

4. Save your changes.

- **Civic Platform JavaScript GIS:**

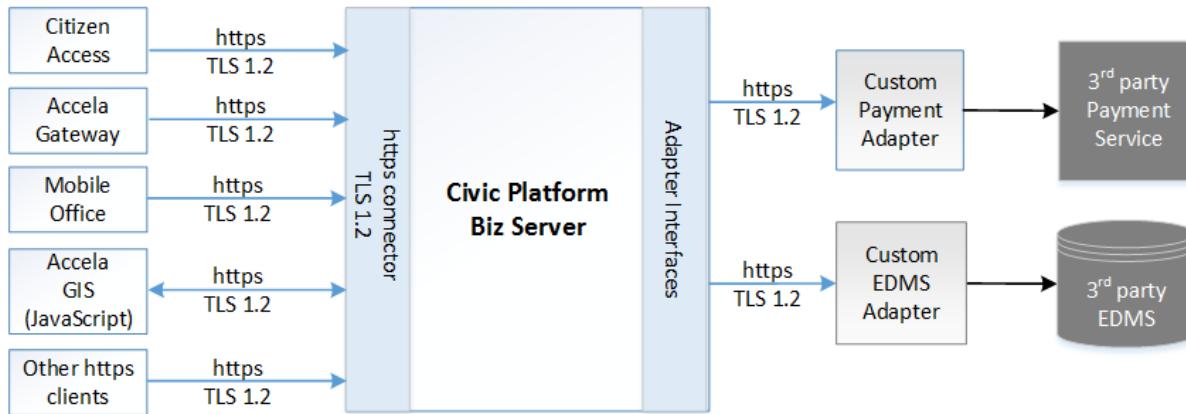
1. Connect to the JavaScript GIS database.
2. Execute the following SQL:

```
UPDATE GLOBALSETTING SET DISABLESHA1='True'
```

TLS Compliance

Civic Platform allows agencies who are mandated with PCI security compliance to migrate to [TLS 1.2](#). The Civic Platform server has been certified to support TLS 1.2 with inbound and outbound https communications.

The following logical diagram illustrates the inbound and outbound https Civic Platform server connections enabled with TLS 1.2:



Civic Platform continues to support http connections and is backward compatible with TLS 1.0 and TLS 1.1. Although migration to TLS 1.2 is highly recommended sooner than later, self-hosted agencies can plan and implement their own timeline for migrating Civic Platform and custom adapter integrations along with their on-premise server and network environments to TLS 1.2.

Accela-hosted environments will officially migrate to TLS 1.2 at a to-be-announced date. Accela Customer Support will send out advanced notifications about the TLS 1.2 migration. During the TLS 1.2 migration, Accela will disable TLS 1.0 and 1.1 so that Civic Platform servers and applications on the Accela-hosted environments will only use TLS 1.2. To prepare for this change, Accela-hosted agencies must plan to migrate any custom integration components to TLS 1.2 and https connections to the Civic Platform server before the announced TLS 1.2 migration date.

Topics:

- [TLS 1.2 and Civic Platform integration components](#)
- [Configuration](#)

TLS 1.2 and Civic Platform integration components

This section lists the integration components that have been tested with TLS 1.2 and https communications with the Civic Platform server.

Payment Adapters

Citizen Access credit card and ACH payment transactions now support TLS 1.2 using the following payment adapters:

- CivicPay
- PayPal Payflow Pro
- Converge/Virtual Merchant
- Official Payments STP

Civic Platform back-office credit card and ACH payment transactions now support TLS 1.2 using the following payment adapters:

- PayPal Payflow Pro
- Converge/Virtual Merchant
- Official Payments STP

IMPORTANT:

The following standard payment adapters are no longer supported:

- FirstData
- Govolution

Document Adapters

Document operations using the Accela Standard adapter, including the MTOM-enabled Standard adapter, now support TLS 1.2.

Reporting Components

Report operations (viewing, uploading, downloading, and reviewing documents) using the following reporting components now support TLS 1.2:

- Adhoc Reports
- Crystal Reports

EMSE web service

Third-party web services invoking EMSE web services now support TLS 1.2.

Web services certified with the Civic Platform invoked by EMSE scripts also support TLS 1.2.

EMSE Tool

The EMSE Tool used for EMSE script management and deployment now supports TLS 1.2 when communicating to a third-party source code control system such as Github or SVN. This applies to both the Master script and custom script repositories.

Civic Platform components

Communications between the Civic Platform server and the following components now support TLS 1.2 and HTTPS:

- Citizen Access
- Accela GIS (JavaScript version)

Notes:



The Silverlight GIS version currently does not support TLS 1.2.

If your agency is using Microsoft SQL Server, refer to this [Microsoft knowledge article](#) to determine the required SQL Server patch for your SQL Server database to enable support for TLS 1.2.

- Accela Mobile Office
- Accela Gateway (Construct API proxy)

Notes:



Accela Gateway 3.2 and higher versions support TLS 1.2. Earlier Accela Gateway versions do not work if the Civic Platform biz server is enabled with TLS 1.2.

Configuration

- [Enabling TLS 1.2 on the Civic Platform server](#)
- [Importing self-signed certificates](#)
- [Configuring https connections to the Civic Platform server](#)
- [Enabling TLS 1.2 on the third-party server](#)
- [Enabling TLS 1.2 on the browsers](#)

Enabling TLS 1.2 on the Civic Platform server

Civic Platform support for TLS 1.2 requires an https connector in the JBoss subsystem configuration in `standalone-full.xml`. By default, the Civic Platform base installer includes an https connector that is enabled for TLS 1.2, TLS 1.1, and TLS 1.0 (for backward compatibility).

To fully enable TLS 1.2 on the Civic Platform server:

1. On the `av.biz` server, navigate to the Civic Platform installation folder, and edit the `standalone-full.xml` file.
2. In the https connector, change `protocol="TLSv1,TLSv1.1,TLSv1.2"` to `protocol="TLSv1.2"`:

```
<connector name="https"
           protocol="HTTP/1.1"
           scheme="https"
           socket-binding="https"
           enable-lookups="false"
           secure="true"
           max-post-size="50000000">
    <ssl password="{changeit}">
```

```

        certificate-key-file="${jboss.server.home.dir}/conf/certs/
${av.host}.key"
        cipher-suite="!aNULL:!ADH:!eNULL:!LOW:!EXP:!SSLv2:RC4+RSA:
+HIGH:+MEDIUM:!RC4:ALL"
        protocol="TLSv1.2"
        verify-client="false"
        certificate-file="${jboss.server.home.dir}/conf/certs/
${av.host}.crt"/>
    </connector>

```

Enabling TLS 1.2 on IIS Servers

When an agency migrates to TLS 1.2, Microsoft IIS Servers hosting client components such as Citizen Access and Accela GIS must configure the Windows server registry to only enable TLS 1.2. The security channel protocols are stored in the following registry key:

```
HKey_Local_Machine\System\CurrentControlSet\Control\SecurityProviders
\SCHANNEL\Protocols
```

In the Protocols registry key, disable the non-TLS 1.2 protocols and enable TLS 1.2. For details, see these Microsoft articles: [How to disable PCT 1.0, SSL 2.0, SSL 3.0, or TLS 1.0 in Internet Information Services](#) or [Disabling TLS 1.0 on your Windows 2008 R2 server](#).

Note: If the IIS Server has not yet enabled https, configure the IIS Server for https. For details, see [Citizen Access Administrator Guide > Implementation Planning > Enabling HTTPS](#).

Importing self-signed certificates

If an integration server such as an EDMS server is using a self-signed certificate, import the self-signed certificate into the av.biz and av.web servers' certificate trusted store.

If your agency uses a self-signed certificate on the av.biz and av.web servers, import the self-signed certificate into the client component server's certificate trusted store (such as Mobile Office, Accela GIS, and Accela Gateway servers).

Configuring https connections to the Civic Platform biz server

When your agency migrates to TLS 1.2, any integration component that has been previously configured with an http connection to the Civic Platform biz server must update the connection URL to https.

Configure the following Civic Platform components connecting to the Civic Platform biz server to use https connection URLs:

- EDMS Adapters

Go to **Civic Platform Administration > Admin Tools > Standard Choices > EDMS**, update the ADS_SERVER_URL to match the URL parameter of the ADS or Standard adapter to use https.

- Accela GIS (JavaScript version)

Go to **JavaScript GIS Administration > {Agency} > Integrations**. Update the Automation and ACA server URLs to use https, respectively.

Go to **Civic Platform Administration > Admin Tools > GIS Service**. Update the JavaScript API URL to use https.

- Mobile Office

When installing Mobile Office Server, on the **Protocol** window, you must select **Enable HTTPS**. (You can optionally also select the Enable HTTP option. Civic Platform currently supports both HTTP and HTTPS.)

In addition, go to **Mobile Office Administration > Options > {User Group} > General Settings**. Update the Application Server URL to use https for each user group.

- Accela Gateway

Go to **Accela Gateway Portal > Environment Settings**. In the **Allowed App Servers** field, update the biz server URL to use https.

Enabling TLS 1.2 on third-party components

When your agency migrates to TLS 1.2, any third-party adapter or web service that integrates with Civic Platform must enable TLS 1.2 on the third-party server. For example, if your agency uses a custom EDMS adapter, the Windows Server hosting the third-party EDMS service must enable TLS 1.2 (for details, see this [Microsoft blog](#)).

Consult the third-party vendor's documentation for details about how to enable TLS 1.2 on their server.

Enabling TLS 1.2 on the browser

When your agency migrates to TLS 1.2, client browsers connecting to Civic Platform must enable TLS 1.2. Consult the specific browser's help documentation to enable browser support for TLS 1.2.

Notes

- TLS 1.2 support for PayPal and Converge/Virtual Merchant payment adapters was introduced in Civic Platform versions 9.1.0, 8.0.3.0.11, 8.0.0.0.5, 7.3.3.10.4.
- TLS 1.2 support for the EDMS standard adapter was introduced in Civic Platform version 9.1.2.

