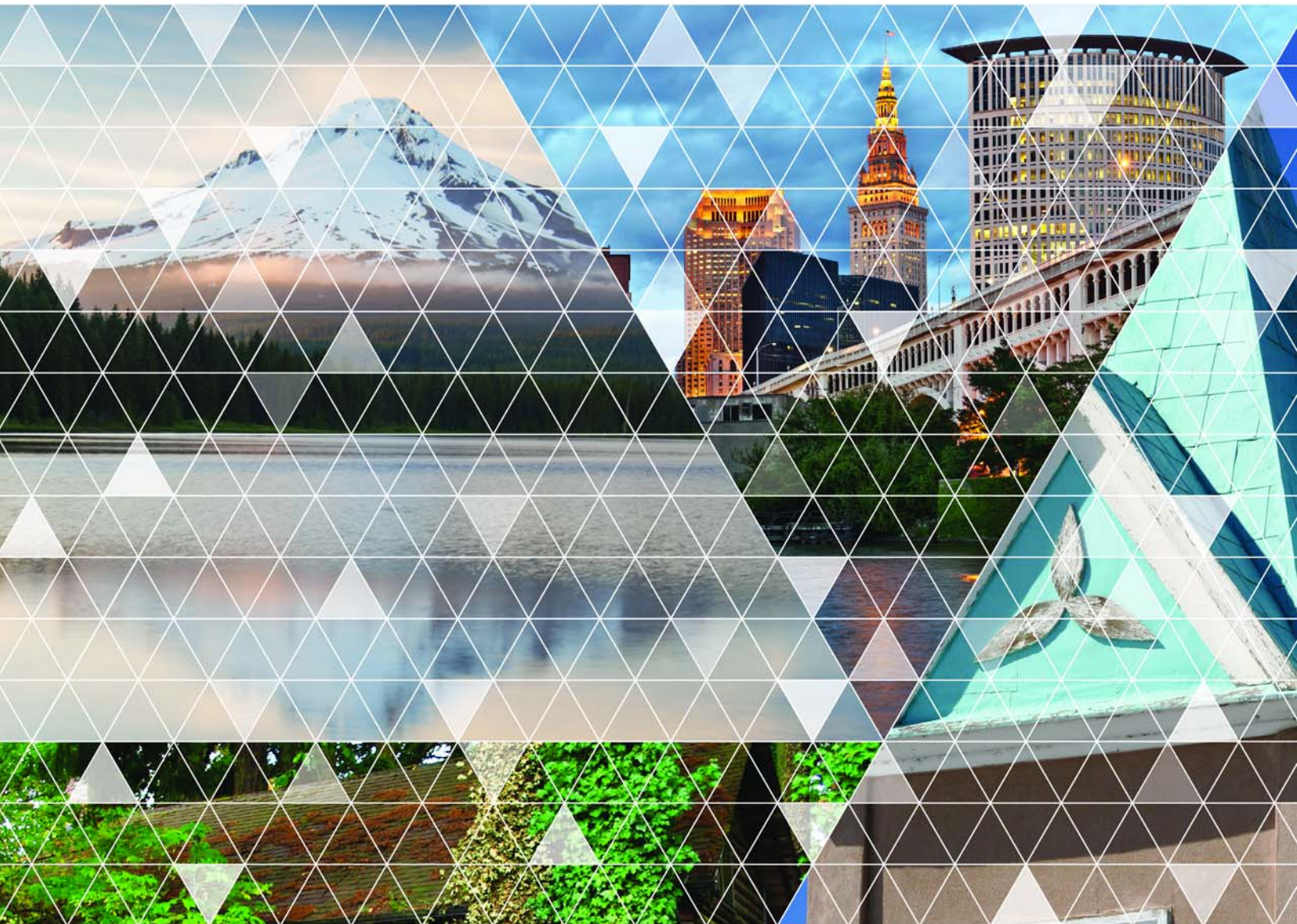


Version 8.0

Accela Civic Platform®

Configurer's Guide



Accela Civic Platform Configurer's Guide

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| | |
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Introduction

Related Links

[Understanding Function Identifications](#)

[Understanding Standard Choices](#)

Understanding Function Identifications

Civic Platform uses Function Identifications (FIDs) settings to determine access to Civic Platform functions. You can set FIDs at the agency, modules, and user group levels.

FID settings for a module apply to all users with access to the module. FID settings for a user group further refine the module FID settings by applying to all user group members within the module. A single user can belong to only one user group for each module.

Civic Platform exposes more than 500 FIDs to solution modules and to user groups, and 34 FIDs (11 of which are unique) to SuperAgency module user groups.

Civic Platform provides a single UI page for configuring the FIDs ([Figure 1: Setting FIDs](#)).

User Group - Edit
Use this form to edit User Group.

Solution * : Land Management
Module * : Building
Group Name * : BuildingAdmin
Description:

Status * : Enable Disable

| Function Group | Function Type | Function SubType | Function Category | Function Name | No Access | Full Access | Read Only |
|--|---|--|---------------------------------------|--|-----------------------|----------------------------------|-----------------------|
| <input checked="" type="checkbox"/> Accela | <input checked="" type="checkbox"/> Setup | <input checked="" type="checkbox"/> Agency | <input checked="" type="checkbox"/> - | <input checked="" type="checkbox"/> 0076-Accela Events | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| <input checked="" type="checkbox"/> Admin | <input checked="" type="checkbox"/> AMS | <input checked="" type="checkbox"/> - | <input checked="" type="checkbox"/> - | <input checked="" type="checkbox"/> 0160-Admin AMS Asset Definition - 5.1 | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| | | | | <input checked="" type="checkbox"/> 0201-Admin-Generating Work Orders By PM Schedule - 6.1 | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| | | | | <input checked="" type="checkbox"/> 0195-Admin-PM Schedule - 6.1 | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |

Figure 1: Setting FIDs

Civic Platform organizes the FIDs in a hierarchy as follows:

Function Group

The main level of FID categorization that consists of four headings:

- **Agency.** Comprised of a single FID for configuring Accela events.
- **Admin.** Addresses functionality associated with the Admin tab in the Civic Platform 'Classic' interfaces. Consists of features typically associated with administrators.
- **Daily.** Addresses functionality associated with the Daily tab in the Civic Platform 'Classic' interfaces. Consists of features typically associated with users.
- **Reference.** Primarily addresses Address, Parcel, Owner (APO) functionality.

Function Type

A FID type categorization within each of the three main function groups (Admin, Daily, Reference)

Function Subtype

A FID subtype categorization within each function type

Function Category

A FID category within each function subtype

Function Name

The name of the FID

You configure each FID by setting it for no access, full access, or read access as follows:

| | |
|--------------------|---|
| No Access | Deactivates the feature entirely for the selected user group. The user group cannot see this feature. |
| Full Access | Grants the selected user group permission to perform all actions associated with the feature. |
| Read Only | Allows the selected user group to view and to search information associated with the feature. |

[Function IDs Reference](#) provides reference information about all FIDs in numeric ascending order.

Understanding Standard Choices

Civic Platform uses Standard Choices to configure system switches, define values in a shared drop-down list, or configure EMSE Master Scripts.

Standard Choices comprise a Standard Choice name, such as CONTACT_TYPE, along with Standard Choice Values and Value Descriptions. You specify Standard Choice Values and Value Descriptions to configure the operations associated with the named Standard Choice.

Civic Platform provides many different Standard Choices that you can invoke and configure to produce the desired effect. [Standard Choices Reference](#) documents the most common Standard Choices. You can define your own Standard Choices for shared drop-down lists and EMSE scripts.

Working With FIDs and Standard Choices

Related Links

[Working with FIDs](#)

[Working with Standard Choices](#)

Working with Standard Choices

Civic Platform Vantage360 is gradually taking over the Standard Choice management which is previously solely available in the legacy Classic administration portlet. You can maintain a few contact Standard Choices in the Vantage360 setup administration portlet, and maintain all the other Standard Choices in the Classic administration portlet.

This section includes instructions on how to maintain the Standard Choices. [Standard Choices Reference](#) includes some of the common Standard Choices required for certain functions to work properly.

Topics

- [Editing Standard Choices in the Setup Admin](#)
- [Managing Standard Choices in the Classic Admin](#)

Editing Standard Choices in the Setup Admin

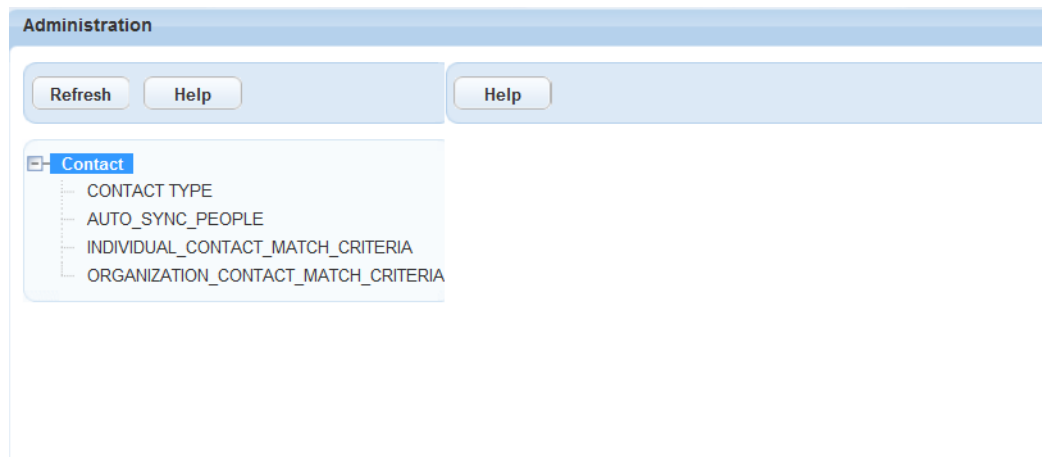
Make sure to always edit the following contact Standard Choices in the Standard Choices portlet in the Setup Admin instead of the Classic Admin. Although you can access these Standard Choices from the Classic Admin portlet, Civic Platform does not update the configuration functions available in the Classic Admin to the latest as provided in the Setup Admin.

- [CONTACT TYPE](#)
- [AUTO_SYNC_PEOPLE](#)
- [INDIVIDUAL_CONTACT_MATCH_CRITERIA](#)
- [ORGANIZATION_CONTACT_MATCH_CRITERIA](#)

For the other Standard Choices, please still go to the Classic Admin (see [Managing Standard Choices in the Classic Admin](#)).

To edit Standard Choices in the Setup Admin

1. Log in to Civic Platform.
Civic Platform displays your personalized Home page.
2. Click the main link configured for Civic Platform administration.
Civic Platform displays the Setup administration portlet.
3. Click **Agency Profile > Standard Choices**.
Civic Platform displays the Standard Choices portlet with the list of Standard Choices.



- Click a Standard Choice in the navigation tree to edit the Standard Choice. For example, the CONTACT TYPE Standard Choice.

The Standard Choice edit page displays on the right side.

Standard Choices: CONTACT TYPE

Submit New Delete Help

Standard Choices Item Name: CONTACT TYPE

Description: (250 char max) CONTACT TYPE DROP DOWN LIST FOR THE APPLICANT OR ANY CONTACTS.

Status: Enable Disable

Type: System Switch Shared drop-down EMSE Business Configuration

| <input type="checkbox"/> Contact Type * | For Reference/Transactions | Active | Template | Document Group | Contact Address Types |
|---|----------------------------|-------------------------------------|--------------|--------------------|---|
| <input type="checkbox"/> Assigned Planner | Both | <input checked="" type="checkbox"/> | CXP_ASI | | Associated Contact Address Type |
| <input type="checkbox"/> Association | Both | <input checked="" type="checkbox"/> | CHECK ALIAS | ARLENE | Associated Contact Address Type |
| <input type="checkbox"/> Beneficiary | Both | <input checked="" type="checkbox"/> | B_CBAC | | Associated Contact Address Type |
| <input type="checkbox"/> Billing Contact | Both | <input checked="" type="checkbox"/> | CHECK ALIAS2 | BUILDING*NEW*()-<> | Associated Contact Address Type |

- Update the Standard Choice fields as necessary. For the description of the common fields, see [Standard Choices Fields](#). For the fields specific to the Standard Choice, check the detailed description of the Standard Choice in [Standard Choices Reference](#).
- If desired, click **New** to add a Standard Choice Value.
- If desired, mark the check box besides a Standard Choice Value, and click **Delete** to delete the Standard Choice Value.
- Click **Submit** to save the change.

Managing Standard Choices in the Classic Admin

Topics

- [Searching for an Existing Standard Choice](#)
- [Creating a Standard Choice](#)
- [Editing Standard Choices](#)
- [Deleting Standard Choices](#)

Searching for an Existing Standard Choice

To add another item or to remove an item from a list of choices in Civic Platform, you need to locate the existing Standard Choice that controls the list. To find a Standard Choice, you must know the name or part of the name of the Standard Choice item.

To search for an existing Standard Choice

1. Select **Admin Tools > Agency Profile > Standard Choices**.

Civic Platform displays the Standard Choices Search page.

Standard Choices - Search

Use this form to add or search a Standard Choices item.

Standard Choices Item Name:

Submit

or

Add

New Standard Choices Item

2. In the **Standard Choices Item Name** field, enter the Standard Choice name or part of the name.

3. Click **Submit**.

Civic Platform displays a list of Standard Choices that match your search criteria on the Standard Choices Browse page.

Standard Choices - Browse

Use this form to edit a Standard Choices item.

| Edit | Name |
|-----------------------|--------------------------------------|
| <input type="radio"/> | BATCH_JOB_SERVICE_CATEGORY |
| <input type="radio"/> | CENSUS_BUREAU_CONSTRUCTION_TYPE_CODE |
| <input type="radio"/> | COMPLAINT REFERRED SOURCE |
| <input type="radio"/> | COMPLAINT REFERRED TYPE |
| <input type="radio"/> | CONDITION STATUS |
| <input type="radio"/> | CONDITION TYPE |
| <input type="radio"/> | CONTACT RELATIONSHIP |
| <input type="radio"/> | CREATE_NEW_ITEMS |
| <input type="radio"/> | ENFORCEMENT DEFENDANT EYE COLOR |
| <input type="radio"/> | ENFORCEMENT DEFENDANT HAIR COLOR |

◀ 1 2 ▶

Search

or

Add

New Standard Choices Item

4. Click the red dot beside the Standard Choice item that you want.

Creating a Standard Choice

You can create a new Standard Choice. The initial installation of Civic Platform includes the Standard Choices that Civic Platform requires to function properly. You can add a new list of choices or a new system setting to a Standard Choice item.

For example, if your agency purchases GIS, you can set up GIS object set reports as Standard Choices. For an illustration of this example, see [Organizations and Users](#).

To create a Standard Choice

1. Select **Admin Tools > Agency Profile > Standard Choices**.

Civic Platform displays the Standard Choices—Search page.

Standard Choices - Search

Use this form to add or search a Standard Choices item.

Standard Choices Item Name:

or

New Standard Choices Item

2. Click **Add**.

Civic Platform displays the Standard Choices—Add page.

Standard Choices - Add

Use this form to add a Standard Choices Item.

Standard Choices Item Name * : [Standard Data](#)

Description: (250 char max)

Status * : Enable Disable

Type * : System Switch Shared drop-down EMSE Document Status Document Review Status Virtual Folder

3. Update these fields as described in [Standard Choices Fields](#).

4. Click **Submit**.

Civic Platform displays the Standard Choices Item—Edit page.

Standard Choices Item - Edit

Use this form to set up a Standard Choices Item.

Standard Choices Item Name: [Standard Data](#)

Description: (250 char max)

Status: Enable Disable

Type: System Switch Shared drop-down EMSE Document Status Document Review Status Virtual Folder

| Standard Choices Value(Default) | Standard Choices Value | Value Desc | Active |
|---------------------------------|------------------------|------------|--------|
| No records found. | | | |

5. Click **Add**.

Civic Platform displays the Add Standard Choices Value page.

Add Standard Choices Value

Standard Choices Item Name:

Value * :

Value Desc: (1024 char max)

Status * : Enable Disable

6. Specify the fields as described in [Standard Choices Fields](#).
7. Click **Submit**.
Civic Platform returns to the Standard Choices Item—Edit page, which displays the new Standard Choice value.
8. Add other Standard Choice values as necessary.
9. When you have added all of the choices in your Standard Choices item, click **Update**.

Editing Standard Choices

You can update or change Standard Choices. For example, if your local government enacts a new law or a new ordinance regarding professional licenses, you can add a new status to the list of license statuses.

For some special Standard Choice, such as LICENSED PROFESSIONAL TYPE, you can associate an application-specific information (ASI) groups to each Value item. This is useful when, for example, some special professional fields require extra information. The extra fields can be pre-defined in the ASI group, which you associated with the licensed professional type. When agency users create a license record of that licensed professional type, the extra fields from the associated ASI group display during the license creation process. To learn how to create an ASI group, see the “Working with Application Specific Information” chapter in the *Civic Platform Administrator Guide*.

To edit Standard Choices

1. Find the Standard Choice that you want to work with. For instructions, see [Searching for an Existing Standard Choice](#).

Civic Platform displays the Standard Choices Item—Edit page.

Standard Choices Item - Edit

Use this form to set up a Standard Choices Item.

Standard Choices Item Name: [Standard Data](#)

Description: (250 char max)

Status: Enable Disable

Type: System Switch Shared drop-down EMSE Document Status Document Review Status Virtual Folder

| Standard Choices Value (Default) | Standard Choices Value | Value Desc | Active | |
|--|---|--------------------------------|-------------------------------------|------------------------|
| Pay with Bank Account | <input type="text" value="Pay with Bank Account"/> | <input type="text" value="2"/> | <input checked="" type="checkbox"/> | Delete |
| Pay with Credit Card | <input type="text" value="Pay with Credit Card"/> | <input type="text" value="0"/> | <input checked="" type="checkbox"/> | Delete |
| Pay with Trust Account | <input type="text" value="Pay with Trust Account"/> | <input type="text" value="1"/> | <input checked="" type="checkbox"/> | Delete |

[Update](#) [Add](#) [Cancel](#)

2. Update the necessary fields as described in [Standard Choices Fields](#).
 - If required, click **Delete** to remove a Standard Choice value line item.
 - For some special Standard Choices, such as LICENSED PROFESSIONAL TYPE, you can associate an ASI group to each of its Value items. See Step 3 for detailed information.
To learn how to create an ASI group, see the “Working with Application Specific Information” chapter in the *Civic Platform Administrator Guide*.
3. For some special Standard Choices, such as LICENSED PROFESSIONAL TYPE, there is an **Associated Template** link in each of its Value lines. You can click it to associate an ASI group with the Value item or disassociate an ASI group from the Value item. To do this, follow the sub step below:

Standard Choices Item - Edit

Use this form to set up a Standard Choices Item.

Standard Choices Item Name: [Standard Data](#)

Description: (250 char max)

Status: Enable Disable

Type: System Switch Shared drop-down EMSE Business Configuration

| Standard Choices Value | Value Desc | Active | |
|------------------------|----------------|-------------------------------------|--|
| ARCH | drop list item | <input checked="" type="checkbox"/> | Delete Associated Template |
| ASPH | drop list item | <input checked="" type="checkbox"/> | Delete Associated Template |
| CIVIL ENG | drop list item | <input checked="" type="checkbox"/> | Delete Associated Template |

- a. Click the **Associated Template** link in each value line item.
 Civic Platform displays the Associated Template window.

The screenshot shows a browser window with the URL: https://qa-server21.achievo.com:42443/?FUSEACTION=AssociatedTe... The window title is "Licensed Professional Type - Add Attribute Template". The main text says "Use this form to associate template to a Licensed Professional Type." Below this, there are two fields: "Licensed Professional Type" with the value "ARCH" and "Application Specific Info Group Code" with a dropdown menu showing "BOB COMM POL". At the bottom, there are "Save" and "Cancel" buttons.

- b. Click the **Application Specific Info Group Code** drop-down list, and do one of the following:
- Select a desired ASI group if you want to associate the ASI group with the value item.
 - Select the “---Select---” if you want to disassociate the associated ASI group from the value item.
- c. Click **Save**.

4. Click **Update**.
 Civic Platform saves your changes.

Table 1: Standard Choices Fields

| | |
|----------------------------|---|
| Active | Mark the check box to include this item on the list of Standard Choices. Clear the check box to remove this item from the Standard Choices. |
| Description | Enter a description that explains this Standard Choice item. |
| Standard Choices Item Name | The name of the Standard Choice. For many Standard Choices, you must enter a name exactly as instructed. For others, you can enter an intuitive descriptive name. |
| Standard Choices Value | Enter the value that users see as an option in the drop-down list. |
| Status | Select the Enable option to make this list of Standard Choices available. Select the Disable option to make this list of Standard Choices unavailable. |
| Type | The Type selection indicates how the Standard Choice functions within Civic Platform. If you add a Standard Choice that sets specific functionality with Yes or No values, |

select the **System Switch** type. **System Switch** is the default value for newly added Standard Choices. If you add a Standard Choice that functions as a shared drop-down list, then select the **Shared Drop-down** Type. If you add a Standard Choice that functions as an EMSE script, then select the **EMSE** Type.

| | |
|------------|--|
| Value Desc | Enter a description of the value. In some cases, you can enter specific information, such as a report string or a URL. |
|------------|--|

Deleting Standard Choices

You can delete an item from a list of Standard Choices when you no longer want users to select the item. For example, you might remove an out-of-date report from a list of reports.

You can also choose to disable an item in a list of Standard Choices if you want to use that item again in the list of choices. For example, you might have seasonal items in a list of Standard Choices that are not always valid options, such as snow removal in a list of service requests in the winter, that you disable in the summer.



Note:

You cannot delete a list of Standard Choices; you can only disable it.

To delete a Standard Choices value

1. Find the Standard Choice that you want to delete. For instructions, see [Searching for an Existing Standard Choice](#).

Civic Platform displays the Standard Choices Item—Edit page.

Standard Choices Item - Edit

Use this form to set up a Standard Choices Item.

Standard Choices Item Name: [Standard Data](#)

Description: (250 char max)

Status: Enable Disable

Type: System Switch Shared drop-down EMSE Document Status Document Review Status Virtual Folder

| Standard Choices Value (Default) | Standard Choices Value | Value Desc | Active |
|--|---|--------------------------------|--|
| Pay with Bank Account | <input type="text" value="Pay with Bank Account"/> | <input type="text" value="2"/> | <input checked="" type="checkbox"/> Delete |
| Pay with Credit Card | <input type="text" value="Pay with Credit Card"/> | <input type="text" value="0"/> | <input checked="" type="checkbox"/> Delete |
| Pay with Trust Account | <input type="text" value="Pay with Trust Account"/> | <input type="text" value="1"/> | <input checked="" type="checkbox"/> Delete |

[Update](#) [Add](#) [Cancel](#)

2. Click **Delete** by the Standard Choice value that you want to delete. Civic Platform displays a confirmation pop-up window.
3. Click **OK** to confirm the deletion. Civic Platform deletes the Standard Choice item.

Working with FIDs



Note:

Setup the agency organization and the user groups before you configure function identifications.

Function Identifications (FIDs) control many Civic Platform features. An activated FID can alter the display or functionality of the Civic Platform software. You activate FIDs for user groups. See [Function IDs Reference](#) for a complete reference of FIDs.

To activate a Function Identification for a user group

1. Log in to Civic Platform as an administrator.
2. Choose **Admin Tools > User Profile > User Group**.
Civic Platform displays the User Group—Search window.

User Group - Search
Use this form to add or search User Groups.

Group Name:

Module * :

Status: All Enable Disable

Submit

or

Add

New User Group

3. Locate the user group for which you want to activate FIDs.

- Enter the group name and click **Submit**.
- Select the module and click **Submit**.



Note:

The User Group - Edit window contains several hundred line items and can take a couple minutes to display.

Civic Platform displays the User Group - Edit window.

User Group - Edit
Use this form to edit User Group.

Solution * : Land Management
Module * : Building
Group Name * : BuildingAdmin
Description:

Status * : Enable Disable

Save **Clone** **Cancel**

| Function Group | Function Type | Function SubType | Function Category | Function Name | No Access | Full Access | Read Only |
|--|---|--|---------------------------------------|--|-----------------------|----------------------------------|-----------------------|
| <input checked="" type="checkbox"/> Accela | <input checked="" type="checkbox"/> Setup | <input checked="" type="checkbox"/> Agency | <input checked="" type="checkbox"/> - | <input checked="" type="checkbox"/> 0076-Accela Events | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| <input checked="" type="checkbox"/> Admin | <input checked="" type="checkbox"/> AMS | <input checked="" type="checkbox"/> - | <input checked="" type="checkbox"/> - | <input checked="" type="checkbox"/> 0160-Admin AMS Asset Definition - 5.1 | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| | | | | <input checked="" type="checkbox"/> 0201-Admin-Generating Work Orders By PM Schedule - 6.1 | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| | | | | <input checked="" type="checkbox"/> 0195-Admin-PM Schedule - 6.1 | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |

4. In the **Function Name** column, mark the check box beside each FID that you want to activate for this user group.
Civic Platform changes the access level to Full.
5. For each activated FID, mark the option that corresponds with the level of access that you want to grant to the user group.

No Access

Deactivates the feature entirely for the selected user group. The user group cannot view this feature.

Full Access

Grants the selected user group permission to perform all actions associated with the feature.

Read Only Allows the selected user group to view and to search information associated with the feature.

6. Click **Save**.

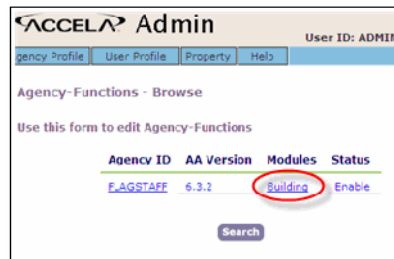
To set a FID at the agency level and module level

1. Log in to Civic Platform as a super agency administrator.
2. Navigate to Admin Tools > Agency Profile > Agency Functions.
Civic Platform displays the Agency-Functions-Search page.

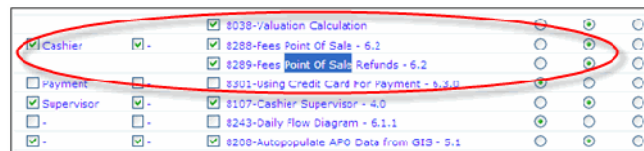


3. Specify the search criteria for the module of interest.

- Click **Submit** to display a list of all modules for all agencies.
- Enter an agency code and click **Submit** to display a list of all modules within the specified agency.
- Enter an agency code, select a module, and click **Submit**.
Civic Platform displays the list of modules that match the specified criteria.



4. Select the specific module for which you want to set one or more FIDs.
Civic Platform displays the Agency-Functions-Edit page.



5. Click **Save**.

FIDs and Standard Choices Cross Reference

Related Links

- [Administration](#)
- [Organizations and Users](#)
- [Search](#)
- [User View](#)
- [System Automation](#)
- [People](#)
- [Address, Parcel and Owners \(APO\)](#)
- [Electronic Document Review](#)
- [Workflow](#)
- [Record Management](#)
- [Calendars](#)
- [Communication Manager](#)
- [Accounting](#)
- [Time Accounting Tracker](#)
- [Streamlining Data Processing](#)
- [Land Management](#)
- [Asset Management](#)
- [License and Case Management](#)
- [Citizen Access Administration](#)
- [Internationalization and Localization](#)

Administration

Related Links

- [Civic Platform Setup Portlets](#)
- [Classic Admin Tools](#)

Civic Platform Setup Portlets

You use the Civic Platform Setup portlet ([Figure 2: Civic Platform Setup Portlet](#)) to perform major administrative tasks. The portlet provides a menu with expanded options and drop-down selections that link to specific setup portlets.

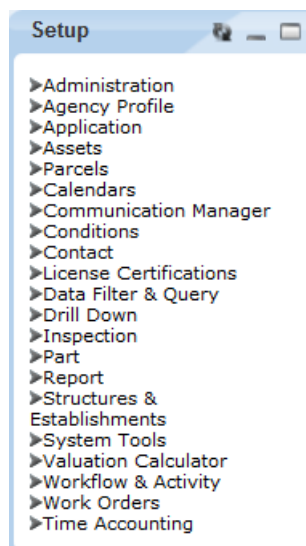


Figure 2: Civic Platform Setup Portlet

Civic Platform uses Function Identifications (FIDs) or Standard Choice settings to determine the availability of the setup portlets. This section lists the required FID(s) and Standard Choice(s) for each setup portlet.

Topics

- [Administration](#)
- [Agency Profile](#)
- [Application](#)
- [Assets](#)
- [Parcels](#)
- [Calendars](#)
- [Communication Manager](#)
- [Conditions](#)
- [Contact](#)
- [License Certifications](#)
- [Data Filter & Query](#)
- [Drill Down](#)
- [Inspection](#)
- [Part](#)
- [Report](#)
- [Structures & Establishments](#)
- [System Tools](#)
- [Finance](#)

- [Workflow & Activity](#)
- [Work Orders](#)
- [Time Accounting](#)

Administration

Set the FIDs to enable the administration setup portlets.

Table 2: FIDs for Administration Setup Portlets

| Setup Portlet | Required FIDs |
|-------------------|--|
| AA Admin | 0318-Administration , 0075-Admin License Types , 0308-Data Manager Export , 0309-Data Manager Import |
| ACA Admin | 0142-Admin Agency Security Policies |
| Workflow Designer | 0346-Workflow Designer |

Agency Profile

Set the FIDs to enable the agency profile setup portlets.

Table 3: FIDs for Agency Profile Setup Portlets

| Setup Portlet | Required FIDs |
|------------------------|--|
| APO Form Layout Editor | 0268-APO Form Layout Editor |
| ASI Form Layout Editor | 0261-ASI Form Layout Editor |
| Address Type Group | 0276-Address Type Group |
| Console Configuration | 0221-Admin Console Management |
| Content Customize | 0184-Admin Content Customization |
| Create New Objects | 0315-Admin Create New Objects |
| Dictionary | 0354-Custom Dictionary |
| Form Portlet Designer | 0137-Admin Filter View |
| Link Portlets | 0164-Admin Links Portlets |
| Logo | 0187-Admin Upload Logo Image |
| Menu Navigation | 0230-Menu Navigation Admin |
| My Navigation | 0188-Admin Flow Diagram |
| Portlet | 0164-Admin Links Portlets |
| Regional Settings | 0350-Regional Settings |
| Service | 0292-Service Management |
| Standard Choices | 0349-Contact Management |
| Standard Comments | 0290-Admin - Standard Comments |
| Text Settings | 0155-Admin Label Configuration |

Application

Set the FIDs to enable the application setup portlets.

Table 4: FIDs for Application Setup Portlets

| Setup Portlet | Required FIDs |
|------------------------|---|
| ASI Form Layout Editor | 0261-ASI Form Layout Editor |
| ASI Lookup Tables | 0259-ASI Lookup Table |
| ASI Security | 0142-Admin Agency Security Policies |
| Expression Builder | 0260-Expression Builder |
| License Verification | 0320-Admin License Verification |
| Record Type Security | - |
| Set Type | 0351-Admin Set Type |
| Shared Drop-Down List | 0272-Control Shared Drop Down List in Admin |

Assets

Set the FIDs to enable the assets setup portlets.

Table 5: FIDs for Assets Setup Portlets

| Setup Portlet | Required FIDs |
|----------------------|--|
| Attribute | 0158-Admin Attribute Definition |
| Attribute Table | 0305-Admin Attribute Table Definition |
| Attribute Template | 0158-Admin Attribute Definition, 0159-Admin Attribute Template Definition, 0305-Admin Attribute Table Definition |
| Condition Assessment | 0227-Condition Assessment, 0274-Rating Type |
| Form Layout Editor | 0269-Admin Attribute Form Layout Editor |
| Rating Type | 0274-Rating Type |
| Security | 0255-Manage Asset Type Security |
| Type | 0160-Admin AMS Asset Definition, 0182-Admin GIS Attribute Mapping, 0253-Asset GIS Synchronize, 0252-Asset Type Available CAP Type, 0326-Define Asset Usage Unit Type, 0274-Rating Type |

Parcels

Set the FIDs to enable the parcels setup portlets.

Table 6: FIDs for Parcels Setup Portlets

| Setup Portlet | Required FIDs |
|-----------------------|-------------------------------------|
| GIS Attribute Mapping | 0342-Parcels GIS Attributes Mapping |

Calendars

Set the FIDs to enable the calendar setup portlets.

Table 7: FIDs for Calendars Setup Portlets

| Setup Portlet | Required FIDs |
|---------------|---|
| Calendar | 0336-User Calendar, 0314-Admin Meeting Calendar, 0337-Agency Holiday Calendar, 0257-Admin Inspection Calendar, 0258-Supervisor Inspection Calendaring, 0281-Supervisor Master Calendaring |

Communication Manager

Set the FIDs to enable the communication manager setup portlets.

Table 8: FIDs for Communication Manager Setup Portlets

| Setup Portlet | Required FIDs |
|------------------------|---|
| Account Settings | 0360-Account Settings |
| Alert | 0151-Admin Alert and Rules |
| Alert Rule | 0151-Admin Alert and Rules |
| Announcement | 0134-Admin-Message-General, 0135-Admin-Message-Supervisor |
| General Settings | 0361-General Settings |
| Notification Templates | 0184-Admin Content Customization |

Conditions

Set the FIDs to enable the condition setup portlets.

Table 9: FIDs for Conditions Setup Portlets

| Setup Portlet | Required FIDs |
|---------------|-------------------------|
| Conditions | 0275-Condition by Group |

Contact

Set the FIDs to enable the contact setup portlets.

Table 10: FIDs for Contact Setup Portlets

| Setup Portlet | Required FIDs |
|----------------------|--------------------------------------|
| Contact Type Setting | 0340-Reference Contact Type Security |
| Identifier Fields | 0353-Contact Identity Fields |

License Certifications

Set the FIDs to enable the license certifications setup portlets.

Table 11: FIDs for License Certifications Setup Portlets

| Setup Portlet | Required FIDs |
|----------------------|--------------------------------------|
| Continuing Education | 0311-Admin Continuing Education Info |
| Education | 0310-Admin Education Info |
| Examination | 0312-Admin Examination Info |

Data Filter & Query

Set the FIDs to enable the data filter & query setup portlets.

Table 12: FIDs for Data Filter & Query Setup Portlets

| Setup Portlet | Required FIDs |
|---------------------|--|
| Data Filter | 0139-Admin-DataFilter/QuickQuery |
| Global QuickQueries | 0139-Admin-DataFilter/QuickQuery |
| My QuickQueries | 0139-Admin-DataFilter/QuickQuery , 0327-Edit My QuickQuery By Administration |

Drill Down

Set the FIDs to enable the drill-down setup portlets.

Table 13: FIDs for Drill Down Setup Portlets

| Setup Portlet | Required FIDs |
|----------------|---|
| ASI Drill-Down | 0273-ASI Table Drill Down |

Inspection

Set the FIDs to enable the inspection setup portlets.

Table 14: FIDs for Inspection Setup Portlets

| Setup Portlet | Required FIDs |
|--------------------------|---|
| Inspection Type Security | 0142-Admin Agency Security Policies |

Part

Set the FIDs to enable the part setup portlets.

Table 15: FIDs for Part Setup Portlets

| Setup Portlet | Required FIDs |
|---------------|--|
| Part Contact | 0214-Admin AMS Parts Vendors and Manufacturers |
| Part Location | 0213-Admin AMS Parts Item Location |

Report

Set the FIDs to enable the report setup portlets.

Table 16: FIDs for Report Setup Portlets

| Setup Portlet | Required FIDs |
|--------------------|---|
| Report Manager | 0226-Reports Manager Admin , 0240-Reports Manager Admin |
| SmartChart Queries | 0157-Admin SmartChart Query Configuration |
| SmartCharts | 0156-Admin SmartChart Configuration |

Structures & Establishments

Set the FIDs to enable the structures & establishments setup portlets.

Table 17: FIDs for Structures & Establishments Setup Portlets

| Setup Portlet | Required FIDs |
|--------------------|--|
| Attribute | 0294-Structure and Establishment, 0158-Admin Attribute Definition |
| Attribute Template | 0294-Structure and Establishment, 0159-Admin Attribute Template Definition, 0158-Admin Attribute Definition, 0305-Admin Attribute Table Definition |
| Form Layout Editor | 0294-Structure and Establishment, 0269-Admin Attribute Form Layout Editor |
| Type | 0294-Structure and Establishment |

System Tools

Set the FIDs to enable the system tools setup portlets.

Table 18: FIDs for System Tools Setup Portlets

| Setup Portlet | Required FIDs |
|-----------------------------|---|
| Audit Log | 0307-Audit Logger Definition |
| Batch Engine | 0285-Batch Job Schedule, 0284-Batch Job Maintenance |
| Delegate User | 0286-Delegate User Management |
| Export | 0185-Admin V360 Export |
| GIS Integration Diagnostics | 0348-AA-AGIS Integration Diagnosis Tool |
| Import | 0186-Admin V360 Import |
| Product License | 0300-License Management |
| PublicUser | 8224-Citizen Admin Supervisor |
| Sequence Generator | 0270-Sequence Generator |
| Social Media | 0347-Social Media |

Finance

Set the Standard Choice to enable the finance setup portlets.

Table 19: FID or Standard Choice for Finance Calculator Setup Portlets

| Setup Portlet | Required FID or Standard Choice |
|---------------------|---------------------------------|
| Occupancy | VALUATION_CALCULATOR_VERSION |
| Receipt Print Audit | 0324-Admin Receipt Print Audit |

Workflow & Activity

Set the FIDs to enable the workflow & activity setup portlets.

Table 20: FIDs for Workflow & Activity Setup Portlets

| Setup Portlet | Required FIDs |
|------------------------|--------------------------------------|
| Activity Specific Info | 0246-Activities Specific Information |

| Setup Portlet | Required FIDs |
|------------------------|--|
| Activity Type | 0246-Activities Specific Information |
| Assign Task | 8133-Workflow Task Assignments |
| Skillset | 0150-Admin Workload and Skillset |
| TSI Form Layout Editor | 0267-TSI Form Layout Editor |
| Workflow Security | 8140-Limit Assignments by Dept |
| Workload | 0150-Admin Workload and Skillset |

Work Orders

Set the FIDs to enable the work orders setup portlets.

Table 21: FIDs for Work Orders Setup Portlets

| Setup Portlet | Required FIDs |
|---------------------|---|
| Cost Group | 0330-Admin Work Order Costing Group Definition |
| Cost Item | 0161-Admin Work Order Costing Item Definition , 0332-Daily Cost Rate Definition |
| Work Order Task | 0254-WO Task Definition , 0306-Work Order Type |
| Work Order Template | 0169-Admin-Work Order Template , 0170-Admin-WO Template Costing , 0173-WO Template Part , 0254-WO Task Definition |

Time Accounting

Set the FIDs to enable the time accounting setup portlets.

Table 22: FIDs for Time Accounting Setup Portlets

| Setup Portlet | Required FIDs |
|------------------|---|
| Group | 0266-Admin Time Accounting Group |
| Type Maintenance | 0264-Admin Time Accounting Type |
| User Profiles | 0265-Admin Time Accounting User Profile , 0332-Daily Cost Rate Definition |

Classic Admin Tools

With Civic Platform you can conduct most of the administration tasks. However, a few tasks are still solely available in the legacy Classic administration portlet ([Figure 3: Classic Admin Tools](#)).

The Classic Admin Tools are organized into function groups, such as Fees, Workflow, or Applications. Within each group is a set of tools that support the function. For example, the User Profile group includes the Organizations, Groups and Users tools. Civic Platform uses Function Identifications (FIDs) settings to determine the availability of each tool.

The screenshot shows the top navigation bar of the Classic Admin Tools interface. The user ID is ADMIN. The main navigation tabs include Agency Profile, User Profile, Attachments, Application, People, Property, Fees, Inspection, Condition, Workflow, and Calendar. The 'Admin Tools' tab is active, and the 'Daily' sub-tab is selected. The ACCELA AUTOMATION® logo is visible in the top right corner.

Below the navigation bar, the interface is divided into two main sections:

- Daily Activities:**
 - [Smart Manager](#)
 - [Tickler](#), [Tickler Collection](#), [SmartNotice](#)
 - [Application](#)
- Administrator Tools:**
 - [Agency Profile](#)
 - [Standard Choices](#), [Standard Comments](#), [Oracle Report](#)
 - [Security Policy](#), [Setup Text](#), [Content Customize](#), [Sequence](#)

Figure 3: Classic Admin Tools

This section lists the required FIDs for all the features in Classic Admin Tools.




Topics

- [Agency Profile](#)
- [User Profile](#)
- [Attachments](#)
- [Application](#)
- [People](#)
- [Property](#)
- [Fees](#)
- [Inspection](#)
- [Condition](#)
- [Workflow](#)
- [Calendar](#)
- [Events](#)
- [Help](#)
- [GIS](#)
- [Report Management](#)

Agency Profile

Set the FIDs to enable the agency profile admin tools.

Table 23: FIDs for Agency Profile Admin Tools

| Classic Admin Tool | Required FIDs |
|--------------------|--|
| Standard Choices | 0080-Admin Rbizdomain Maintenance |
| Std Comment | 0098-Reference Standard Comments  Note: If both you enable 0098 and 0290-Admin - Standard Comments , clicking the tool opens the Standard Comments portlet in Civic Platform. |
| APO | 0085-Admin APO Template |
| Oracle Report | 0099-Admin Oracle Reports |
| Security Policy | 8162-Application Limit Access by App Type  Note: Clicking the Application Type Security link opens the Record Type Security portlet in Civic Platform. 8140-Limit Assignments by Dept  Note: |

| Classic Admin Tool | Required FIDs |
|--------------------------------------|--|
| | <p>Clicking the Workflow Task Security link opens the Workflow Task Security portlet in Civic Platform.</p> <p>0142-Admin Agency Security Policies</p> <p> Note: Clicking the Inspection Type Security link opens the Inspection Type Security in Civic Platform.</p> <p>0235-Inspection Default Value Policy, 0236-Inspection Type and Status Security, 8138-Condition Limit Access by Dept, 0248-Admin-Security Policy-EDMS Access Security, 0224-Active Directory</p> |
| Setup Text | <p>0155-Admin Label Configuration</p> <p> Note: Clicking the tool opens the Text Settings portlet in Civic Platform.</p> |
| Content Customize | <p>0184-Admin Content Customization</p> <p> Note: Clicking the tool opens the Content Customize portlet in Civic Platform.</p> |
| Product License | <p>0320-Admin License Verification</p> <p> Note: Clicking the tool opens the License Verification portlet in Civic Platform.</p> |
| Events (Super agency only) | 0076-Accela Events |
| Login Page Links (Super agency only) | 0120-Accela Login Page Navigation Link Maintenance |
| Announcements (Super agency only) | 0122-Accela System Announcements |
| Replace Password (Super agency only) | 0128-Accela User Profile Replace Password |
| OnlineHelp (Super agency only) | 0087-Accela Online Help |
| Functions (Super agency only) | 0092-Accela Functions |
| Version (Super agency only) | 0093-Accela Release Versions |
| Agency (Super agency only) | 0094-Accela Agency |
| Agency Functions (Super agency only) | 0095-Accela Agency Functions |

User Profile

Set the FIDs to enable the user profile admin tools.

Table 24: FIDs for User Profile Admin Tools

| Classic Admin Tool | Required FIDs |
|--------------------|---|
| Organization | 0045-Admin Organizational Hierarchy |
| User Group | 0096-Admin User Groups |
| User | 0004-Admin Users , 0207-Admin Inspector Districts , 0224-Active Directory |

Attachments

Set the FIDs to enable the attachments admin tools.

Table 25: FIDs for Attachment Admin Tools

| Classic Admin Tool | Required FIDs |
|--------------------|--------------------------|
| Document | 0108-Admin Document Type |

Application

Set the FIDs to enable the application admin tools.


Table 26: FIDs for Application Admin Tools

| Classic Admin Tool | Required FIDs |
|-----------------------------|--|
| Application Type | 0065-Admin Application Types, 0071-Admin Workflow Final Inspection, 0202-Application Type Image, 0244-Fee Estimation, 0245-Long Term Time Tracking |
| Application Spec Info | 0179-Admin App Spec Info Subgroups, 0242-Required for Fee Calculation |
| Application Spec Info Table | 0205-Admin App Spec Info Table, 0242-Required for Fee Calculation |
| SmartChoice Group | 0061-Admin SmartChoice Code |
| Renewal Info | 0073-Admin Application Renewal Info |
| Application Status Group | 0127-Admin Application Status Group |
| Find Application Profile | 0131-Admin Find App (Custom) |
| General Profile | 0136-Admin Application General Profile |

People

Set the FIDs to enable the people admin tools.

Table 27: FIDs for People Admin Tools


| Classic Admin Tool | Required FIDs |
|-----------------------|---|
| Licensed Professional | 0191-Update license expiration task |
| Contact | 0084-Reference People Contact  Note: Clicking the tool opens the reference contact portlet in Civic Platform. |
| People Template | 0088-Admin People User Defined Attributes |
| People Info Table | 0250-People Info Table |

Property

Set the FIDs to enable the property admin tools.

Table 28: FIDs for Property Admin Tools



| Classic Admin Tool | Required FIDs |
|--------------------|---|
| Address | 0006-Reference Property Addresses, 0207-Admin Inspector Districts |

| Classic Admin Tool | Required FIDs |
|--------------------|--|
| Parcel | 0005-Reference Property Parcels, 0204-Properties Rename Parcel ID, 0207-Admin Inspector Districts, 0241-Parcel Subdivision and Lot Search |
| Owner | 0089-Reference Property Owners |
| APO Template | 0085-Admin APO Template |
| Structure | 0082-Reference Structure, 0194-Access Structure Conditions, 0212-Reference Structure Condition History |
| Structure Template | 0083-Reference Structure Template |
| Address Type Group | 0276-Address Type Group  Note: Clicking the tool opens the address type group portlet in Civic Platform. |

Fees

Set the FIDs to enable the fees admin tools.

Table 29: FIDs for Fees Admin Tools

| Classic Admin Tool | Required FIDs |
|--------------------|---|
| Fee Schedules | 0068-Admin Fee Item Sets |
| Fee Items | 0068-Admin Fee Item Sets |
| Payment Period | 0047-Admin Fee Payment Periods |
| Valuation Calc | 0059-Admin Fees Valuation Calculation  Note: If you enable both the FID and the Standard Choice VALUATION_CALCULATOR_VERSION, clicking the tool opens the valuation calculator - occupancy portlet in Civic Platform. |
| Regional Modifier | 0060-Admin Fees Regional Modifier |
| Copy Schedule | 0068-Admin Fee Item Sets |
| Trust Account | 0191-Update license expiration task  Note: Clicking the tool opens the trust account portlet in Civic Platform. |
| Manage Schedule | 0181-Admin Fees Manage Schedule |
| Fee Calc | 0206-Admin Fee Decisions |
| Fee Calc Criteria | 0206-Admin Fee Decisions |

Inspection

Set the FIDs to enable the inspection admin tools.

Table 30: FIDs for Inspection Admin Tools



| Classic Admin Tool | Required FIDs |
|--------------------|---|
| Inspection | 0133-Admin Inspection Type Sets, 0218-Admin Auto-Assign Inspection, 0229-Admin display Department, 0232-Admin display Option/Required column, 0288-Enable Inspection Flow |

| Classic Admin Tool | Required FIDs |
|-------------------------|--|
| Inspection Result Group | 0123-Admin Inspection Result Group |
| Guide Sheet | 0124-Admin Inspection Guide Sheet , 0256-Carrying over Failed Guide Sheet Items , 0291-Guide Sheet Template Data |
| Guide Sheet Group | 0125-Admin Inspection Guide Sheet Group |
| Inspection Grade Group | 0339-Inspection Grade Group |

Condition

Set the FIDs to enable the condition admin tools.




Table 31: FIDs for Condition Admin Tools



| Classic Admin Tool | Required FIDs |
|--------------------|---|
| Condition Type | 0054-Admin Condition Types |
| Std Condition | 0056-Admin Condition Reference  Note: The condition portlet (0275-Condition by Group) in Civic Platform provides the same configuration that is available in this admin tool. |
| Condition Status | 0055-Admin Condition Status  Note: The condition portlet (0275-Condition by Group) in Civic Platform provides the same configuration that is available in this admin tool. |
| Process Validation | 0058-Admin Workflow Condition Validation |

Workflow

Set the FIDs to enable the workflow admin tools.

Table 32: FIDs for Workflow Admin Tools

| Classic Admin Tool | Required FIDs |
|--------------------|--|
| Workflow | 0112-Admin Workflow , 0249-Workflow Edit  Note: The workflow designer portlet (0346-Workflow Designer) in Civic Platform provides the same configuration that is available in this admin tool. |
| Process | 0036-Admin Workflow Processes , 0245-Long Term Time Tracking  Note: The workflow designer portlet (0346-Workflow Designer) in Civic Platform provides the same configuration that is available in this admin tool. |
| Task Status | 0063-Admin Workflow Task Status , 0245-Long Term Time Tracking  Note: The workflow designer portlet (0346-Workflow Designer) in Civic Platform provides the same configuration that is available in this admin tool. |

| Classic Admin Tool | Required FIDs |
|--------------------|---|
| Task Specific Info | 0143-Admin Workflow Task Spec Info , 0180-Admin Workflow Task Spec Info Subgroups |
| Activity | 0097-Admin Workflow Review Activity  Note: The workflow designer portlet (0346-Workflow Designer) in Civic Platform provides the same configuration that is available in this admin tool. |
| eMail Setting | 0025-Admin Workflow Email Settings  Note: The workflow designer portlet (0346-Workflow Designer) in Civic Platform provides the same configuration that is available in this admin tool. |
| eMail Message | 0026-Admin Workflow Email Messages |
| Proximity Alerts | 0154-Reference Workflow Proximity Alerts |
| Report Setting | 0192-Workflow Report Setting |

Calendar

Set the FIDs to enable the calendar admin tools.


Table 33: FIDs for Calendar Admin Tools

| Classic Admin Tool | Required FIDs |
|-------------------------|--|
| Hearing Body | 0049-Reference Hearing Bodies |
| Location | 0048-Reference Hearing Locations |
| Hearing Calendar | 0050-Reference Hearing Calendar (old) , 0183-Reference Hearing Calendar |
| Calendar | 0115-Reference Calendar Structure , 0116-Admin Calendar Structure Blockout , 0117-Admin Calendar Inspection Blockout , 0234-Workflow Calendar , 0247-Agency Workday Calendar |
| Hearing Reason | 0251-Hearing Reason |
| Calendar Administration | See Calendars |

Events

Set the FIDs to enable the event admin tools.

Table 34: FIDs for Event Admin Tools


| Classic Admin Tool | Required FIDs |
|--------------------|---|
| Events | 0077-Admin Event Setup |
| Scripts | 0078-Admin Event Script Setup |
| Script Test | 0079-Admin Event Script Test |
| Batch Job | 0106-Admin Batch job  Note: Clicking the tool opens the batch engine portlet in Civic Platform. |
| Master Scripts | 0077-Admin Event Setup |

| Classic Admin Tool | Required FIDs |
|--------------------|--|
| Custom Script | 0077-Admin Event Setup |

Help

Set the FIDs to enable the help admin tools.

Table 35: FIDs for Help Admin Tools

| Classic Admin Tool | Required FIDs |
|--------------------|---|
| OnlineHelp | 0086-Admin Agency Online Help |
| Announcements | 0121-Admin Agency Announcements  Note: The announcements portlet (0134-Admin-Message-General) in Civic Platform provides the same configuration that is available in this admin tool. |

GIS

Set the FIDs to enable the GIS admin tools.


Table 36: FIDs for GIS Admin Tools

| Classic Admin Tool | Required FIDs |
|----------------------------------|---|
| Dynamic Theme | 0111-Admin GIS Dynamic Themes |
| Reference User Parameter | 0111-Admin GIS Dynamic Themes |
| GIS Search Fields | 0118-Admin GIS Search Tools |
| GIS Service | 0107-Admin GIS Service , 0243-GIS Service |
| GIS Feature | 0129-Admin GIS Feature |
| Establish Genealogy | 0130-Admin GIS Establish Genealogy |
| Proximity Alerts | 0153-Reference GIS Proximity Alerts |
| GIS Map Object Attribute Mapping | 0182-Admin GIS Attribute Mapping |

Report Management

Set the FIDs to enable the report management admin tools.

Table 37: FIDs for Report Management Admin Tools

| Classic Admin Tool | Required FIDs |
|----------------------|---|
| Report Management | 0145-Admin Report Management |
| Auto Report | 0193-Report Management Auto Report |
| Report Manager Admin | 0226-Reports Manager Admin  Note: Clicking the tool opens the report manager portlet in Civic Platform. |

Organizations and Users

Related Links

[Organization Administration](#)

[User Group and User Administration](#)

[Password Security](#)

[Multiple Agency Administration](#)

Organization Administration

Set the following FID for administrators to create and manage organization hierarchy in Civic Platform:

- [0045-Admin Organizational Hierarchy](#)

User Group and User Administration

Set the following FID for administrators to create and manage user groups in Civic Platform:

- [0096-Admin User Groups](#)
- [0004-Admin Users](#)

Password Security

Multi-agency administrators set requirements for agency-level password security. This includes setting minimum password length, character requirements such as a minimum number of numeric characters, and restrictions such as not allowing a user ID to be part of a password.

Multi-agency administrators can use the `PASSWORD_POLICY_SETTINGS` and `PASSWORD_CALCULATION_SCORE` Standard Choices to modify or add password requirements.

To configure password security, set the following Standard Choices:

- [PASSWORD_POLICY_SETTINGS](#)
- [PASSWORD_CALCULATION_SCORE](#)

Multiple Agency Administration

The multiple-agency administration feature requires Standard Choice configuration. You must specify one agency to act as the main agency and the rest as sub-agencies in Civic Platform Classic.

Topics

- [Administering Multiple Agencies](#)
- [Sharing Information across Agencies](#)
- [Configuring Delegate Users](#)
- [Configuring Multiple Agency Services](#)

Administering Multiple Agencies

Set the following Standard Choice to enable the multiple-agency administration with one agency as the main agency, and the others as the sub-agencies.

- [MULTI_SERVICE_SETTINGS](#)

Sharing Information across Agencies

Set the following Standard Choice to check for duplicate address, parcel, and owner information in multiple agencies:

- [APO_CHECK_DUPLICATE](#)

Set the following Standard Choice to share contacts across multiple agencies:

- [CONTACT_ACROSS_AGENCIES](#)

Configuring Delegate Users

You can configure Civic Platform to expose the delegate user portlets and enable the ability of delegate users to switch between the main agency and sub-agencies.

You must set configurations for each agency and the delegate user configuration can differ from agency to agency.

Set the following FIDs:

- [0286-Delegate User Management](#)
- [8098-Agency Switch](#)
- [8403-Multi Agency Switch](#)

**Note:**

Civic Platform can enable the ability to toggle between agencies by two different FIDs. The Multi-Agency switch controlled by FID 8403 offers more functionality and overrides FID 8098 Agency Switch when you set both to Full-Access.

Configuring Multiple Agency Services

Set the following FID and Standard Choice:

- [0292-Service Management](#)
- [MULTI_SERVICE_SETTINGS](#)

Set agency priority definitions in the Agency Priority EMSE script. This script determines which agency has priority over other agencies should multiple agencies offer the same service.

Search

Related Links

[Configuring Global Search](#)

[Configuring 'PERMITS' Plus Search](#)

[Configuring Nearby Query](#)

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 displays the 'Global Search' interface with three main sections: Records, Locations, and Assets.

Records Section: A table with columns: Number, Record Type, Short Notes, Location, Contact, Project Name, and Created Date. It shows 5 records, with the first one being an enforcement record.

| Number | Record Type | Short Notes | Location | Contact | Project Name | Created Date |
|-----------------------------------|---------------------------|------------------|--------------------------------|----------------|------------------|--------------|
| 89CAS-00000-00004 | Enforcement | 07ACCC03799IC... | 12 N FLAGSTAFF, AZ | steve harrison | street Violation | 01/15/2009 |
| 89PLB-00000-00055 | PC - Residential Plumbing | | 11 D E strame BLVD, SUITE u... | | | 12/10/2009 |
| 89PLB-00000-00045 | PC - Residential Plumbing | 1 block past... | 11 D E strame BLVD, SUITE u... | | | 11/20/2009 |
| 88AST-00000-00226 | AMSStreetLight/Relamp | | | | | 11/19/2008 |
| 88AST-00000-00119 | AMSStreetLight/Relamp | | | | | 11/10/2008 |

Displaying Records 1 - 5 of 2478. Page 1 of 496.

Locations Section: A list of addresses with links to parcel information.

- [141 NE State Capitol ST, Salem, OR 97301 \(Parcel \)](#)
- [12 white test, OR 97301 \(Parcel \)](#)
- [1318 Main ST, Lyons, OR 97358 \(Parcel \)](#)
- [1710 NE Lancaster, Salem, OR 97301 \(Parcel \)](#)
- [2350 SE Mission ST, Salem, OR 97301 \(Parcel \)](#)

Displaying Records 1 - 5 of 55. Page 1 of 11.

Assets Section: A table with columns: Asset ID, Asset Type, Asset Group, Location, Status, and Last Updated.

| Asset ID | Asset Type | Asset Group | Location | Status | Last Updated |
|------------------------------|--------------|-------------|----------|--------|--------------|
| STREET LIGHT | Street Light | Street | | ACTIVE | 07/10/2008 |

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, set the following FID(s) and Standard Choices:

- [8434-Global Search](#)
- [GLOBAL_SEARCH_MAX_COUNT](#)
- [BATCH_JOB_SERVICE_CATEGORY](#)
- [GLOBAL_SEARCH_BUILD_INDEX_ENTITIES](#)

Configuring 'PERMITS' Plus Search

To configure search in Permits Plus, set the following FID and Standard Choices:

- [8039-PermitsPlus Historical Data](#)
- [ENABLE_PERMITS_PLUS_SEARCH](#)

Configuring Nearby Query

GIS has the Nearby Query functionality. It enables users to search 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.

To enable the Nearby Query functionality, one of the tasks is to create and run a geotagging batch job. Before you create the batch job, set the following Standard Choice:

- [BATCH_JOB_SERVICE_CATEGORY](#)

When your agency uses GIS as an external APO data source, you can also enable the Nearby Query functionality in the external APO environment, which requires geometry information about addresses and parcels. To enable Civic Platform to retrieve geometry information from the XAPO data source, set the following additional Standard Choices:

- [EXTERNAL_ADDRESS_SOURCE](#)

Enter a map service ID as the value description for the SOURCE_MAP_SERVICE_ID value.

- [EXTERNAL_PARCEL_SOURCE](#)

Enter a map service ID as the value description for the SOURCE_MAP_SERVICE_ID value. And enter a map layer ID as the value description for the SOURCE_MAP_LAYER_ID value.

To set limits on the Nearby Query functionality, for example, the maximum number of GIS features that users can select to perform a nearby query, set the following Standard Choice:

- [GIS_NEARBY_QUERY_LIMITATION](#)

To disable the Nearby Query functionality including the geotagging feature, set the following Standard Choice:

- [DISABLE_GIS_NEARBY_QUERY](#)

User View

Related Links

- [Configuring the Civic Platform Console](#)
- [Configuring the Form Layout Editor](#)
- [Accessing QuickQueries](#)
- [Configuring a Logo or Grade Card](#)
- [Configuring Shared Drop-Down Lists](#)
- [Configuring Customized Display](#)
- [Accessing SmartCharts](#)
- [Configuring Reports](#)

Configuring the Civic Platform Console

Topics

- [Configuring the Create New Menu](#)
- [Configuring the Navigation Menu](#)
- [Configuring the Go To Menu](#)
- [Configuring Flow Diagram](#)
- [Configuring Portlets](#)

Configuring the Create New Menu

You can configure the Create New menu item to display for specific user groups and you can configure the number of create new options that display in the menu.

Set the following FID and Standard Choices:

- [0315-Admin Create New Objects](#)
- [CREATE_NEW_ITEM_DEFAULT_SIZE](#)
- [CREATE_NEW_ITEMS](#)

Configuring the Navigation Menu

You can configure the number of items that display in the Navigation > Recently Viewed menu.

Set the following Standard Choice:

- [RECENTLY_HISTORY_SIZE](#)

Configuring the Go To Menu

You can configure a custom drop-down menu for record detail portlets by customizing the Go To menu tab.

Set the following FID:

- [0230-Menu Navigation Admin](#)

Confirm that you set the value of the Menu_Navigation_Enabled server constant Yes. System administrators can receive technical assistance from either the Accela Customer Resource Center or an Accela Services implementation staff to work with server constants.

Configuring Flow Diagram

Set the following FID to enable administrators to set up and manage flow diagrams, each flow diagram providing list of nodes that help users perform their daily tasks:

- [0188-Admin Flow Diagram](#)

Configuring Portlets

Set the following FID to enable administrators to create their own portlets and embed in Civic Platform website:

- [0164-Admin Links Portlets](#)

Configuring the Form Layout Editor

You can configure the Form Layout Editor for each of the following form layout tool types:

To enable the Form Layout Editor tools, set the following FIDs:

- [0137-Admin Filter View](#)
- [0268-APO Form Layout Editor](#)
- [0261-ASI Form Layout Editor](#)
- [0269-Admin Attribute Form Layout Editor](#)
- [0267-TSI Form Layout Editor](#)

To configure ASI Drill-Downs to display, set the following FIDs:

- [0272-Control Shared Drop Down List in Admin](#)
- [0273-ASI Table Drill Down](#)

Set the following Standard Choice to enable custom fonts to populate in the font drop-down list on the properties window in the form layout editor. Each field on a form has properties you can further define, including the font type.

- [STANDARD_WEB_FONTS](#)

Accessing QuickQueries

Set the following FID:

- [0139-Admin-DataFilter/QuickQuery](#)
- [0327-Edit My QuickQuery By Administration](#)

Configuring a Logo or Grade Card

To configure the logo or the grade card, set the following FID and Standard Choice:

- [0187-Admin Upload Logo Image](#)
- [LOGO_TYPE_CATEGORY](#)

To associate a logo with an ASI Subgroup, set the following Standard Choice:

- [MULTI_SERVICE_SETTINGS](#)

Configuring Shared Drop-Down Lists

You can enable shared drop-down lists so you can use them for different group codes and templates.

Set the following FID and Standard Choice:

- [0272-Control Shared Drop Down List in Admin](#)
- [ALLOW_SHARED_DROPDOWN_LIST](#)

Configuring Customized Display

Administrators can customize labels, receipt summaries and check endorsements.

Set the following FIDs:

- [0155-Admin Label Configuration](#)
- [0184-Admin Content Customization](#)

Set the following Standard Choices to define the templates that administrators can create:

- [CONTENT_TEMPLATE_LIST](#)

Accessing SmartCharts

Set the following FIDs for administrators to configure SmartCharts:

- [0156-Admin SmartChart Configuration](#)
- [0157-Admin SmartChart Query Configuration](#)

Set the following FIDs for users to access SmartCharts:

- [8188-SmartChart Display](#)
- [8195-SmartChart Viewer](#)
- [8211-List Driven SmartChart](#)

Configuring Reports

Set the following FIDs for administrators to configure reports:

- [0226-Reports Manager Admin](#)
- [0240-Reports Manager Admin](#)

System Automation

Related Links

- [Configuring Security Policies](#)
- [Configuring Autonumbers](#)
- [Configuring Integration with Social Media](#)
- [Configuring Import/Export](#)
- [Configuring Event Manager](#)
- [Spell Checker](#)

Configuring Security Policies

You can configure Civic Platform security policies through one Standard Choice and several FIDs.

To configure security

1. Set the following FIDs and Standard Choices:

[APPLICATION_TYPE_SECURITY_FID](#)

The Standard Choice value must match the FID number you want to expose for setting in the Record Type Security portlet.

Record Access
Full ▾ Access of application type

Unassigned

| | |
|---|---|
| --Select-- ▾ 0137 - InspectionView | --Select-- ▾ 0245 - Time Tracking |
| --Select-- ▾ 8028 - Addresses | --Select-- ▾ 8029 - Parcels |
| --Select-- ▾ 8030 - Owners | --Select-- ▾ 8032 - LP Info |
| --Select-- ▾ 8033 - Additional Information | --Select-- ▾ 8106 - Void Application |
| --Select-- ▾ 8112 - Application Cloning | --Select-- ▾ 8132 - Workflow, Workflow History |
| --Select-- ▾ 8141 - CAP Status | --Select-- ▾ 8143 - Cancel Inspections/reschedule |
| --Select-- ▾ 8145 - Inspection Results | --Select-- ▾ 8147 - Inspection Assignments |
| --Select-- ▾ 8203 - Daily Work Order Asset | --Select-- ▾ 8209 - Edit Cap |
| --Select-- ▾ 8212 - Upload an EDMS Document | --Select-- ▾ 8213 - Download an EDMS Document |
| --Select-- ▾ 8240 - Delete EDMS Attachment | --Select-- ▾ 8241 - New Inspection |
| --Select-- ▾ 8281 - Inspector Districting | --Select-- ▾ 8299 - Select CAP To Copy From |

2. Set the following FIDs:

- [0142-Admin Agency Security Policies](#)
- [0235-Inspection Default Value Policy](#)
- [0236-Inspection Type and Status Security](#)
- [0248-Admin-Security Policy-EDMS Access Security](#)
- [8138-Condition Limit Access by Dept](#)
- [8140-Limit Assignments by Dept](#)
- [8162-Application Limit Access by App Type](#)

Configuring Autonumbers

When a user creates a permit Civic Platform automatically generates and assigns a number to it. You cannot modify this number. Set the following FID:

- [0270-Sequence Generator](#)

You can configure Civic Platform to allow users to override the generated record ID numbering. Set the following FID:

- [8097-Manual Application Number Option](#)

To use fiscal year instead of calendar year, set the following Standard Choice:

- [FISCAL_YEAR_START](#)

Configuring Integration with Social Media

Civic Platform now offers integration with Twitter. The integration enables your agency users to post tweets from the Civic Platform website.

Set the following FID to enable the Social Media configuration portlet:

- [0347-Social Media](#)

To customize the application name displayed under the tweets to something different than Civic Platform, set the following Standard Choice:

- [SOCIAL_MEDIA_SETTINGS](#)

Configuring Import/Export

Set the following FIDs and Standard Choice for the Data Manager migration tool, so that administrators can transfer data between Civic Platform agencies.

- [0318-Administration](#)
- [0308-Data Manager Export](#)
- [0309-Data Manager Import](#)
- [DATA_MANAGER_MAX_RECORD_NUMBER](#)

Set the following FIDs for the import/export system tool, so that administrators can transfer system settings such as rule settings and QuickQuery settings into an XML file for importing to other agencies.

- [0185-Admin V360 Export](#)
- [0186-Admin V360 Import](#)

Configuring Event Manager

Set the following FIDs to enable administrators add event scripts in Civic Platform.

- [0077-Admin Event Setup](#)
- [0078-Admin Event Script Setup](#)
- [0079-Admin Event Script Test](#)

Set the following Standard Choice to define the length of period during which the EMSE Message List window has the focus after it appears.

- [EMSE_Settings](#)

Spell Checker

You can configure the spell checker by enabling or disabling it in Civic Platform and Citizen Access.

Set the following Standard Choices:

- [SPELL_CHECKER_ENABLED](#)
- [ACA_SPELL_CHECKER_ENABLED](#) (see the *Citizen Access Administrator Guide*).

People

Related Links

- [Configuring People Template Fields](#)
- [Configuring Reference Contacts](#)
- [Configuring Licensed Professional Types](#)

Configuring People Template Fields

Set the following FIDs for administrators to configure people template fields:

- [0088-Admin People User Defined Attributes](#)
- [0250-People Info Table](#)

Set the following FIDs to display people template fields in the contacts portlet and the licensed professionals portlet:

- [8102-People User Defined Attributes](#)
- [8330-People Info Table](#)

You can configure EMSE as the data source for people template fields, as a drop-down list type, and you can edit the attribute name.



Note:

If your agency implements multi-agency functionality, duplicate behavior at the super agency can result. For example, when selecting services for multiple agencies, Civic Platform can route the same questions at the State, County, or City level. This result occurs if you share template data at the super agency level. For example, if Jon has a licensed professional record that two agencies share and each agency has their own template, Civic Platform duplicates the information display during multi-services selection.

To use EMSE to auto-populate people template fields

1. Modify the *GetPeopleTemplateDropDownListFieldScript* sample script for your agency (see *Civic Platform Scripting Guide*).
2. Set the following Standard Choice:
 - [ENABLE_EMAIL_NOTIFICATION_PROMPT](#)
3. Find the people template field. The data type of the field must be DropDownList. See the “People” chapter in the *Civic Platform Administrator Guide*.

People Template - Detail

Use this form to edit People Template.

Template Information Edit

Template Name: PERMIT OWNER
 Template Type: Permit Owner
 Description: for Miami Dade
 Status: Enable

Attribute Information

| Label (Default) | Label | Description | Unit | Data Type | Required Flag | ACA Display Configuration | Status |
|-----------------|------------|-------------|------|--------------|---------------|---------------------------|--------|
| Owner Type | Owner Type | | | DropDownList | No | Hide | Enable |

Add Cancel

Click the **Edit** button for the people template field.

Attribute Template Name: PERMIT A
 Attribute Type: Contractor
 Attribute Name: OWNER

EMSE Script Drop Down Lists:

Use Shared Drop Down Lists:

(Default)

4. Mark the EMSE Script Drop Down Lists: check box and assign the data source script for the attribute field. For example, the newly modified *GetPeopleTemplateDropdownListFieldScript*.

5. Click the **Update** button.

Configuring Reference Contacts

To configure contacts and contact addresses, set the following Standard Choices in Civic Platform Classic:

- [ENABLE_CONTACT_ADDRESS](#)
- [ENABLE_CONTACT_ADDRESS_VALIDATION](#)
- [EXTERNAL_CONTACT_ADDRESS_SOURCE_\[SOURCE NAME\]](#)
- [CONTACT_ADDRESS_TYPE](#)
- [CONTACT_RELATIONSHIP](#)
- [CONTACT_TYPE_ENABLE](#)
- [RACE](#)

Set the following Standard Choices in the Standard Choices portlet in the Setup Admin:

- [CONTACT TYPE](#)
- [AUTO_SYNC_PEOPLE](#)
- [INDIVIDUAL_CONTACT_MATCH_CRITERIA](#)
- [ORGANIZATION_CONTACT_MATCH_CRITERIA](#)
- [REFERENCE_CONTACT_RELATIONSHIP](#)

Set the following FIDs for the reference contacts portlet:

- [0084-Reference People Contact](#)
- [0316-Reference Contact Condition](#)
- [0317-Reference Contact Condition History](#)
- [0322-Reference Merge Contacts](#)
- [0355-Reference Contact Relationship](#)

Configuring Licensed Professional Types

To configure license professional types, set the following Standard Choice in Civic Platform Classic:

- [LICENSED PROFESSIONAL TYPE](#)

Set the following FIDs for the reference licensed professional portlet:

- [0008-Reference Licensed Professionals](#)
- [0070-Reference Condition Licensed Professionals](#)
- [0211-Reference Licensed Professional Cond. History](#)
- [0283-Associated CAP List](#)
- [0323-Disable Licensed Professionals Search](#)
- [0338-Licensed Professional Document List](#)
- [8389-Reference Licensed Professional Comments](#)

Address, Parcel and Owners (APO)

Related Links

[Configuring Addresses](#)

[Configuring Parcels](#)

[Configuring Common APO and External APO Features](#)

Configuring Addresses

Topics

- [Address Administration](#)
- [Managing Reference Addresses](#)
- [Managing Associations with Addresses](#)

Address Administration

Set the following FIDs and Standard Choices for administrators to configure address types and groups:

- [0276-Address Type Group](#)
- [0277-Address Type for the reference address](#)
- [REF_ADDRESS_TYPE](#)

Managing Reference Addresses

Set the following FIDs for users to manage reference addresses:

- [0006-Reference Property Addresses](#)
- [0321-Reference Address Copy](#)

Agencies can provide an exact numeric street number for search criteria and can return exact address matches in Civic Platform by enabling the field Street # in the Find Application Profile. To display this field, you must configure the R1 Server Constant SPECIAL ADDRESS MODEL. Set the constant value to Yes to display the Street # field in the Application Search Form Profile page.

Use this form to search for a Reference Address

Street #:

Address Street # (Start-End):

Unit #:

Street Direction:

Street Name:

Street Suffix:

City:

County:

State:

Zip:

Managing Associations with Addresses

Civic Platform includes associations between addresses with different records, and different objects (such as documents, addresses, conditions, and so forth).

Set the FIDs for users to manage the association between addresses and different record types:

Table 38: FIDs for Association with Addresses

| Record Type | Required FIDs for Association with Addresses |
|--------------|---|
| Comments | 8388-Reference Address Comments |
| Conditions | 0208-Reference Address Condition History , 0069-Reference Condition Addresses |
| Assets | 0222-Address Asset |
| Inspections | 8281-Inspector Districting |
| PM Schedules | 0220-Admin AMS Address PM Schedule |
| Sets | 8378-Address Set Detail |
| Work Orders | 0223-Address Work Order |

Configuring Parcels

Topics

- [Managing Reference Parcels](#)
- [Managing Associations with Parcels](#)

Managing Reference Parcels

Set the following FIDs for users to manage reference parcels:

- [0005-Reference Property Parcels](#)
- [0109-Reference Genealogy Split/Merge](#)

Parcel number mask restricts users to enter the proper values for a parcel number. Set the following Standard Choice by entering values for PARCEL_ID and PARCEL_ID_MASKED_IN_DB.

- [MASKS](#)

Managing Associations with Parcels

Civic Platform includes associations between parcels with different records, and different objects (such as documents, addresses, conditions, and so forth).

Set the FIDs for users to manage the association between parcels and different record types:

Table 39: FIDs for Association with Parcels

| Record Type | Required FIDs for Association with Parcels |
|-------------------------------|--|
| Activities | 0239-Activities For People and Property |
| Addresses | 0006-Reference Property Addresses |
| Conditions | 0057-Reference Condition Parcels |
| Documents | 8214-View EDMS Attachment List , 8212-Upload EDMS Attachment , 8240-Delete EDMS Attachment |
| Inspections | 8281-Inspector Districting |
| Owners | 0089-Reference Property Owners |
| Records | 0335-Copy or Move Parcel Associated Records |
| Structures and Establishments | 0295-Reference Structure and Establishment |
| Trust Accounts | 0280-Associate Parcel |

Configuring Common APO and External APO Features

After your agency's Civic Platform application leverages APO data, users can take advantage of APO data to streamline the process of managing Accela records. This section explains the setup tasks for enabling users to use the reference APO data and the external APO data.

Topics

- [Prerequisite](#)
- [Auto-Populating Parcels and Owners into Records](#)
- [Selecting Multiple APO Data on Application Intake Form](#)
- [Populating APO Information from GIS Objects](#)
- [Populating GIS Objects from APO Information](#)
- [Synchronizing Associated Reference Data](#)
- [Configuring External APO Sources](#)

Prerequisite

You must make the application intake form available. Configure the following Standard Choice.

- [NEW_SPEAR_FORM_ENABLE](#)

Besides, you must edit the SmartChoice group of the application type to display the Associated GIS Features section on the application intake form.

Auto-Populating Parcels and Owners into Records

To support populating the parcel information and the owner information associated to that record into the application automatically after users search for and add an address record, you must configure the following Standard Choice:

- [ENABLE_AUTO_POPULATE_PARCEL_OWNER](#)

Selecting Multiple APO Data on Application Intake Form

To provide users the ability to select multiple APO or GIS data and attach it to a record, you must configure the following Standard Choice.

- [MULTIPLE_APO_GIS_SELECTION](#)

Populating APO Information from GIS Objects

To enable users to select GIS objects from the GIS map and populate the APO information into a record, and to enable users to view the list of GIS objects associated with the selected APO data and set one of the objects to be primary, you must configure the following Standard Choice.

- [APO_ATTACHMENT_SELECTION](#)
- [ENABLE_SELECT_ADDRESS_OWNER_AFTER_PARCEL](#)
- [ENABLE_SELECT_PARCEL_OWNER_AFTER_ADDRESS](#)

Populating GIS Objects from APO Information

To enable users to view the list of GIS objects associated with the selected APO data and set one of the objects to be primary, you must configure the following Standard Choice.

- [GIS_ATTACHMENT_SELECTION](#)
- [ENABLE_SELECT_ADDRESS_OWNER_AFTER_PARCEL](#)
- [ENABLE_SELECT_PARCEL_OWNER_AFTER_ADDRESS](#)

Synchronizing Associated Reference Data

You can configure your system so that when you add reference data to or delete reference data from a record, Civic Platform adds or delete any associated reference data in the record as well, either automatically or following a prompt. For example, when a user adds information from a reference parcel, Civic Platform adds information from any address, owner, structure, or establishment record associated with that parcel to the record, either automatically or following a prompt.

You must create a mapping between the reference data through the Civic Platform reference data portlets. The mapping relationships are available in the AGIS_OBJECT and AGIS_OBJECT_ENT tables. Besides, you must configure the following Standard Choice.

- [APOSE_SYNCHRONIZE](#)
- [STRUCTURE_CAP_ASSOCIATION](#)



Note:

If you configure both Standard Choices, only APOSE_SYNCHRONIZE takes effect.

Configuring External APO Sources

If your agency uses external address, parcel, and owner data sources, you need to configure the following Standard Choices.

- [EXTERNAL_ADDRESS_SOURCE](#)
- [EXTERNAL_CONTACT_ADDRESS_SOURCE_\[SOURCE NAME\]](#)
- [EXTERNAL_OWNER_SOURCE](#)
- [EXTERNAL_PARCEL_SOURCE](#)

Electronic Document Review



Note:

If you allow the public to submit documents with Citizen Access, make sure that you have defined PDF as a document attachment type.

To learn more about defining document attachment types, see “Document Attachments in ACA” in the *Citizen Access Administrator Guide*.

Related Links

[Configuring the Check-In Revisions Button](#)

[Configuring EDR Access](#)

[Configuring Action Type Choices on the Document Audit Log](#)

[Configuring EMSE Events to Streamline Workflow](#)

Configuring the Check-In Revisions Button

Users check in EDR annotated attachments, from Adobe Acrobat X Pro, with the Check-In Revisions button in the Civic Platform add-on toolbar for Adobe Acrobat X Pro.

Set the following FID:

- [8474-Check-in Permission](#)

Configuring EDR Access

You set the following FIDs to regulate access to EDR attachments and the ability to assign documents, annotate them, or set file review status.

- [8478-Document Assign Permission](#)
- [8477-Document Review Permission](#)
- [8090-Workflow Supervisor](#)
- [8132-Workflow](#)
- [8133-Workflow Task Assignments](#)
- [8140-Limit Assignments by Dept](#)

Configuring Action Type Choices on the Document Audit Log

Set the following Standard Choices:

- [DOCUMENT_AUDIT_ACTION_TYPES](#)
- [E_CODES](#)
- [VIRTUAL FOLDERS \(User-defined Name\)](#)
- [DOCUMENT_REVIEW_STATUS \(User-defined Name\)](#)
- [E_CODES](#)

Configuring EMSE Events to Streamline Workflow

You can configure the following events to streamline workflow by providing email notifications upon certain events.

Table 40: EMSE Events for Electronic Document Review

| | |
|---|--|
| DocumentUploadAfter | Trigger this event after you upload, check in or resubmit a document. |
| DocumentReviewAddBeforeDocumentReviewAddAfter | Trigger this event after you newly assign a review task. |
| DocumentReviewDeleteBeforeDocumentReviewDeleteAfter | Trigger this event after you delete a review task. |
| DocumentReviewUpdateBefore | Trigger this event after you update a review task. |
| DocumentReviewUpdateAfter | Trigger this event after you submit the update of a review task to the database. |
| PublishCommentAfter | Trigger this event after you publish the comments for a document. |



Note: Trained administrators must rewrite scripts in collaboration with an Accela Implementation specialist. Improperly written scripts can seriously damage your system by incorrectly altering or deleting data for many records. For information on writing scripts and using the Event Manager and Script Engine tools, see the *Civic Platform Scripting Guide*.

Workflow

Related Links

[Workflow Administration](#)

[Configuring Daily Workflow Management Tab](#)

Workflow Administration

Civic Platform provides a graphical tool (Workflow Designer) and a legacy 'Classic' tool for designing workflows. The Classic Workflow administration tool follows the standard configuration styles in Civic Platform Classic. Workflow Designer is a graphical design tool much easier to use. Workflow Designer contains almost all the functions in the Classic Workflow administration tool, but gives you the convenience to do everything visually. Some workflow related administration functions work with both Workflow Designer and the Classic Workflow administration tool.

Topics

- [Enabling Workflow Designer](#)
- [Enabling Classic Workflow Administration Tool](#)
- [Common Workflow Configuration Tasks](#)

Enabling Workflow Designer

Set the following FID for administrators to work with Workflow Designer:

- [0346-Workflow Designer](#)

Enabling Classic Workflow Administration Tool

Set the following FIDs for administrators to work in the Classic Workflow administration tool:

- [0112-Admin Workflow](#)
- [0245-Long Term Time Tracking](#)
- [0249-Workflow Edit](#)
- [0036-Admin Workflow Processes](#)
- [0097-Admin Workflow Review Activity](#)
- [0063-Admin Workflow Task Status](#)

Common Workflow Configuration Tasks

No matter whether you work with Workflow Designer or Classic Workflow administration tool, some functions are common for workflow configuration.

Table 41: FIDs and Standard Choices for Workflow Administration

| Workflow Administration | Required FIDs and Standard Choices |
|-------------------------------|---|
| Task Specific Information | 0143-Admin Workflow Task Spec Info , 0180-Admin Workflow Task Spec Info Subgroups , 0267-TSI Form Layout Editor |
| Workflow Report Settings | 0192-Workflow Report Setting |
| Activity Specific Information | 0246-Activities Specific Information |
| Workflow Security | 8140-Limit Assignments by Dept |
| Workflow E-mail Settings | 0026-Admin Workflow Email Messages , 0025-Admin Workflow Email Settings |
| Workflow Proximity Alerts | 0154-Reference Workflow Proximity Alerts |
| Workload and Skillsets | 0150-Admin Workload and Skillset |

Configuring Daily Workflow Management Tab

Topics

- [Configuring the Workflow Tab in the Record Portlet](#)
- [Configuring the Workflow Tasks Tab in the My Tasks Page](#)
- [Enabling Supervisory Rights to Workflow Management](#)
- [Configuring the Task Management](#)
- [Deleting Workflow](#)

Configuring the Workflow Tab in the Record Portlet

Users have the option to assign and manage tasks in the Workflow tab of the Record portlet. You can configure the access to the Workflow tab in the Record portlet.

Set the following FIDs:

- [8132-Workflow](#)
- [8140-Limit Assignments by Dept](#)



Note:

When you set FID 8132 to Full Access, the user has supervisor privileges. For most use cases, set FID 8132 to Read Only and set FID 8140 to Full Access.

Configuring the Workflow Tasks Tab in the My Tasks Page

Users can assign or reassign multiple inspections or workflow tasks from the My Tasks portlet. You can configure the My Tasks user portlet to display all workflow tasks.

Set the following FIDs:

- [8133-Workflow Task Assignments](#)
- [8143-Inspection Scheduling](#)

Enabling Supervisory Rights to Workflow Management

Some users may require supervisory rights to manage workflows.

Set the following FID:

- [8090-Workflow Supervisor](#)



Note:

If you enable FID 8090 Workflow Supervisor, and you need to limit Workflow supervisor access, you must list each functional area you want to restrict in both the [APPLICATION_TYPE_SECURITY_FID](#) and the [WORKFLOW_FIDS](#) Standard Choice.

Configuring the Task Management

Set the following FIDs for users to track workflow tasks:

- [8186-Workflow Task Activation](#)
- [8470-Time Accounting on Workflow](#)
- [8207-Workflow Ad Hoc Tasks - 5.2](#)
- [8427-Claim or Release Task Assignment](#)
- [8317-Workflow Calendar](#)
- [0245-Long Term Time Tracking](#)

Deleting Workflow

Set the following FIDs to enable users to delete a workflow process or a task history record associated with a record:

- [8409-Workflow Delete and Assign](#)
- [8419-Delete Workflow History](#)

Record Management

Related Links

- [Record Type Administration](#)
- [Configuring ASI and ASI Tables](#)
- [Synchronizing Reference Data with Records](#)
- [Configuring Record Access](#)
- [Creating Records](#)
- [Deleting Records](#)
- [Configuring Associations with Records](#)
- [Accessing the Record Detail Audit Log](#)

Record Type Administration

You configure record type additions and record type edits in the AA Classic portlet or in the Setup portlet. The same set of FIDs control the options in the two places.

Set the FIDs and Standard Choices for administrators to configure record types.

Table 42: FIDs and Standard Choices for Record Administration

| Record Administration | Required FIDs and Standard Choices |
|--------------------------------|--|
| Record Status Groups | 0127-Admin Application Status Group |
| Record Type | 0065-Admin Application Types , 0318-Administration , 0319-Delete ASI and ASIT on existing CAPs , 0071-Admin Workflow Final Inspection , CAP_RETAIN_FEESCHEDULE , MULTIPLE_LICENSE_PROFESSIONAL , ENABLE_CAP_TYPE_ALIAS |
| Record Types in Citizen Access | 0075-Admin License Types , 0108-Admin Document Type , 0244-Fee Estimation |
| SmartChoice Groups | 0061-Admin SmartChoice Code |

Configuring ASI and ASI Tables

Topics

- [ASI and ASI Table Administration](#)
- [ASI and ASI Table Drill-down Administration](#)
- [Configuring ASIs and ASI Table Pop-up Windows](#)
- [Enabling ASI Edits in Records](#)
- [Enabling ASI Edits in Inspection Guide Sheets](#)
- [Enabling Additional Information Fields for Building Permits](#)

ASI and ASI Table Administration

Set the following FIDs:

- [0179-Admin App Spec Info Subgroups](#)
- [0205-Admin App Spec Info Table](#)

ASI and ASI Table Drill-down Administration

Set the following FIDs:

- [0273-ASI Table Drill Down](#)

Configuring ASIs and ASI Table Pop-up Windows

You can configure ASI functionality to display pop-up windows when users change ASI or ASI Table group information about a record type.

Set the following Standard Choice:

- [ASI_CONFIGS](#)

To enable the Req for Fee Calc field in the configuration of an application-specific information group or an application-specific information table group, set the following FID:

- [0242-Required for Fee Calculation](#)

Enabling ASI Edits in Records

Set the following FIDs and Standard Choice:

- [8073-App Spec Info](#)
- [8270-App Spec Info Table](#)
- [8397-ASI Table Delete](#)
- [8329-App Spec Info Supervisor](#)
- [ASI_EDIT_CONTROL_SYSTEM_LEVEL](#)

Enabling ASI Edits in Inspection Guide Sheets

Set the following FIDs and Standard Choice:

- [0291-Guide Sheet Template Data](#)

Enabling Additional Information Fields for Building Permits

If your agency wants to collect additional information about building permits, such as the job value, the number of buildings, the number of housing units, whether the parcel is public owned, and the type of construction, set the following FID to make the additional information fields available to users:

- [8033-Additional Information](#)

Set the following Standard Choices to define the default value or the available options for the additional information field:

- [CENSUS_BUREAU_CONSTRUCTION_TYPE_CODE](#)
- [DEFAULT_HOUSING_UNITS](#)
- [DEFAULT_NUMBER_BUILDINGS](#)
- [DEFAULT_JOB_VALUE](#)

Synchronizing Reference Data with Records

You can configure your system so that when you add reference data to a record or delete reference data from a record, Civic Platform adds or deletes associated reference data. When working on a parcel record, for example, Civic Platform can add information from associated address, owner, structure, or establishment records to that parcel record.

Set the following Standard Choice:

- [APOSE_SYNCHRONIZE](#)

The same processes apply when users delete address, parcel, owner, structure, or establishment records from a record.

Civic Platform does not automatically add associated records with locked conditions. If multiple conditions apply to any of the associated records, a pop-up window notifies the user of these conditions.

Civic Platform synchronizes reference information when creating new records and when editing existing records.

Configuring Record Access

You can identify and configure limits for users at the group and the module levels. For example, to set limits on fees, you can locate the Building Cashier group name in the Building module.

Set the following FID and Standard Choice:

- [8162-Application Limit Access by App Type](#)
- [APPLICATION_TYPE_SECURITY_FID](#)

Creating Records

To enable users to create new records, set the following FIDs:

- [8034-New Application](#)
- [8264-Create from Model](#)

To configure how users enter information when creating records, set the following FIDs:

- [8390-CAP Type picker with Tree](#)
- [8391-Create Multiple CAPs for Parcels](#)
- [8097-Manual Application Number Option](#)
- [8324-Create CAP-Validate](#)
- [8234-Get Address And Owner](#)
- [8232-Get Parcel And Owner](#)
- [8326-Fee Estimate](#)

To configure the options provided when users save a new record, set the following FIDs:

- [8325-Save Work in Progress of CAP](#)

The application intake form contains a number of sections depending on your configuration of the associated SmartChoice Group. See [Record Type Administration](#). If a SmartChoice-enabled group does not display, you may not have enabled the information type in the Record portlet. See [Configuring Associations with Records](#)

To configure whether to use a customized tracking number for a new record, set the following Standard Choice:

- [CUSTOMIZED_TRACKING_NBR](#)

Deleting Records

Set the following FID:

- [8410-Delete CAPs](#)

You can configure Civic Platform to delete partially completed records. This configuration does not affect completed records. Set the following Standard Choice:

- [PARTIALLY_COMPLETED_CAP_PURGE_DAYS](#)

Configuring Associations with Records

The Record portlet displays all types of information associated with a record in tabs, or in sections in the application intake form.

1. To configure access to the Detail tab, the Summary tab, the summary button, and the information provided in the record summary page, set the following FIDs:
 - [8209-Single Portlet Data Summary](#)
 - [8395-CAP Summary](#)
 - [8411-Cap Summary](#)
 - [8400-Manage Inspection](#)
 - [8441-Initiated Product Info](#)
2. There are a series of FIDs controlling whether the associated information is available for records.

Table 43: FIDs for Associations with Records

| Information Types | Required FIDs for Associations with Records |
|--|---|
| Addresses | 8253-Showing GIS X/Y Locator , 8028-Addresses |
| Additional Information | 8033-Additional Information |
| App Spec Info and App Spec Info Tables | See Enabling ASI Edits in Records . |
| Comments | 8110-Application Comment , 8340-Application Comments Edit |
| Condition and Condition History | 8020-Condition Full Privileges 8272-Application Condition History , 8365-Inheritable editable |
| Contacts | 8031-Contacts |
| Documents | 8212-Upload EDMS Attachment 8433-Document Permission Settings . For configuring document review functions, see Electronic Document Review . |
| Education and Continuing Education | 8420-Daily Education Info , 8421-Daily Delete Required Education , 8428-Daily Continuing Education Info , 8429-Daily Delete Required Continuing Education |
| Evidence | 8332-Evidence 8334-Evidence Supervisor |
| Examination | 8430-Daily Examination Info , 8431-Daily Delete Required Examination |
| Fees | See Accounting . |
| Hearings | 8229-Hearings (obsolete, replaced by 8483) |
| Inspections | 8249-Turn Off the Inspection Tab in CAP List |
| Owners | 8030-Owners |
| Parcels | 8029-Parcels |
| Payment | See Accounting . |
| Professionals | 8032-Licensed Professionals , 8446-Disable Licensed Professionals Delete |
| Related Records | 8236-Related CAPs-Search , 8292-Create Multiple Related CAPs , 8293-Open New Related CAP in SPEAR , 8323-Update Related |

| Information Types | Required FIDs for Associations with Records |
|---------------------------|--|
| | Caps , 8460-Delete Related Records , RELATED_CAP_SUMMARY , RELATED_RECORDS_DEFAULT_VIEW , RELATED_CAP_CONFIG |
| Renewal | 8398-Cap Renewal , RELATED_CAP_SUMMARY |
| Structure | 8103-Structure Tracking |
| Status and Status History | 8141-Application Status , 8142-Application Status History , 8408-Edit Application Status History |
| Workflow | See Configuring Daily Workflow Management Tab . |

Accessing the Record Detail Audit Log

You can configure Civic Platform for access to the audit log and to view related details for each record.



Note:

System administrators must set the Agency access by setting the Enable Record Audit Log option. These steps are a pre-requisite to setting the FIDs. For complete agency setup steps, see the section, “Editing an Agency” in the “Agencies and Functions” chapter in the *Civic Platform On-premise Administrator Supplement*.

Set the following FIDs:

- [8422-Random Audit History](#)
- [8443-Application Audit Log](#)
- [8458-Complete Record and ASI Audit](#)
- [8459-Specific Record and ASI Audit Log](#)
- [8444-Application Status History Log](#)
- [8468-Inspections List Guide Sheet Audit Log](#)



Note:

Best practice is to set both FIDs to Full Access for supervisors and administrators, and set 8459 to Full Access for daily agency users. These settings allow administrators to view the audit logs from both the Record list portlet and the Record Detail portlet. These settings also allow agency users to view the audit log for a specific record from the Record Detail portlet.

Calendars

Related Links

[Calendar Administration](#)

[Configuring Calendars](#)

Calendar Administration

Holiday calendars, meeting calendars, inspection type calendars, and user calendars require Function Identification (FID) and Standard Choice configuration.

1. Set the FIDs for administrators to work on different calendar types:

Table 44: FIDs and Standard Choices for Calendar Administration

| Calendar Administration | Required FIDs and Standard Choices for Specific Calendar Type |
|-------------------------|--|
| Meeting Calendar | 0314-Admin Meeting Calendar |
| Agency Holiday Calendar | 0337-Agency Holiday Calendar |
| Inspection Calendar | 0257-Admin Inspection Calendar, 0258-Supervisor Inspection Calendaring, 0281-Supervisor Master Calendaring |
| User Calendar | 0336-User Calendar |

2. Set the following Standard Choices for inspection and meeting calendar types:

- CALENDAR_BLOCK_SIZE
- CALENDAR_BLOCK_UNIT
- USER_DISCIPLINES
- USER_DISTRICTS

3. Set the following Standard Choices for meeting calendar types:

- BATCH_JOB_SERVICE_CATEGORY
- CONTACT TYPE
- CONTENT_TEMPLATE_LIST
- MEETING BODY
- MEETING LOCATION
- MEETING MAX TIME
- MEETING_REASON_COMMENT
- MEETING_TYPE_STATUS_GROUP
- MEETING_TYPE_STATUS_{Group Name}

4. Set the following Standard Choices for inspection calendar types:

- CREATE_NEW_INSPECTION_WHEN_RESCHEDULE
- INSPECTOR_WORKLOAD_CALENDAR_TIME


5. Set the following Standard Choices for user calendar types and inspection calendar types:

- CALENDAR_SETTING

6. Set the following Standard Choices for Citizen Access inspection calendars:

Table 45: Standard Choices for ACA Inspection Calendars

| Standard Choice | Standard Choice Value |
|----------------------------|---|
| SCHEDULE_INSPECTION_IN_ACA | NONE. When you select this value, the associated inspection type displays on the ACA Inspection list but public users cannot request, scheduled, or cancel the inspection. |

| Standard Choice | Standard Choice Value |
|-----------------|--|
| | <p>REQUEST_ONLY_PENDING. When you select this value, public users can request or cancel a pending inspection, they cannot schedule the inspection.</p> <p>REQUEST_SAME_DAY_NEXT_DAY. When you select this value, public users must choose from three inspection scheduling options: Same Day, Next Business Day, and Next Available Day.</p> <p>SCHEDULE_USING_CALENDAR. When you select this value, public users can schedule inspections by selecting a date and time from the inspection type calendar. The Same Day, Next Business Day, and Next Available Day options are unavailable.</p> <p> Note: The values you enter for this Standard Choice populate the Schedule Inspection in the ACA drop-down list in the Calendar Administration portlets. The value selected from the drop-down list determines how public users can schedule inspections in ACA.</p> |

Configuring Calendars

Set the following FIDs to enable users' access to different types of calendars:

Table 46: FIDs and Standard Choices for Calendar Access

| User Calendar Access | Required FIDs and Standard Choices for Specific Calendar Type |
|----------------------|---|
| Event Calendar | 8347- User Event Calendar |
| Meeting Calendar | 8482-Create a Set in Record List, 8432-User Meeting Calendar |
| Inspection Calendar | 8144-Inspection Results Supervisor, 8345-User Inspection Calendar |

Communication Manager

Related Links

- [General Settings](#)
- [Account Settings](#)
- [Message Settings](#)

General Settings

Set these FIDs to enable communication manager general settings:

- [8492-Communication List](#)
- [0361-General Settings](#)
- [8494-Record Communication List](#)

Define SMS providers in the following Standard Choices:

- [COMMUNICATION_SMS_PROVIDERS](#)

Account Settings

Set these FIDs to enable the account setting configuration in Civic Platform:

- [8492-Communication List](#)
- [0360-Account Settings](#)

Besides configuring email accounts in the Account Settings portlet, you can also configure a few to and from emails in Standard Choices:

- [ACA_EMAIL_TO_AND_FROM_SETTING](#)
- [ACA_EMAIL_REGISTRATION_TO](#)
- [ACA_EMAIL_REGISTRATION_FROM](#)
- [AGENCY_EMAIL_REGISTRATION_TO](#)

Message Settings

Set the following FIDs to enable administrators to configure alerts, rules, announcements, and notification templates configuration in Civic Platform:

- [0151-Admin Alert and Rules](#)
- [0134-Admin-Message-General](#)
- [0135-Admin-Message-Supervisor](#)
- [0184-Admin Content Customization](#)

Accounting

Related Links

- [Fee Item Administration](#)
- [Managing Fees in Records](#)
- [Configuring Payments](#)
- [Configuring Invoice Options](#)
- [Configuring Trust Accounts](#)
- [Configuring Cashier Workstation](#)
- [Configuring Valuation Calculation](#)
- [Configuring Void and Refund Reason Options](#)

Fee Item Administration

Set the following FIDs and Standard Choices for administrators to configure fee items, including fee estimation:

Table 47: FIDs and Standard Choices for Fee Item Administration

| Fee Item Administration | Required FIDs and Standard Choices |
|----------------------------------|---|
| Fee Items | 0068-Admin Fee Item Sets, FULL_PAY_ALLOCATION_OPTIONS, FEE_QUANTITY_ACCURACY |
| Fee Schedules | 0181-Admin Fees Manage Schedule |
| Payment Periods | 0047-Admin Fee Payment Periods |
| Valuation Calculation | 0059-Admin Fees Valuation Calculation VALUATION_CALCULATOR_VERSION |
| Regional Modifiers | 0060-Admin Fees Regional Modifier |
| Fee Calc. and Fee Calc. Criteria | 0206-Admin Fee Decisions, 0242-Required for Fee Calculation, DISABLE_FEE_CALC_FACTOR_DROPDOWN_FOR_MODULES |
| Fee Estimation (for ACA) | 0244-Fee Estimation |

Managing Fees in Records

Set the following FIDs for users to add and manage record fee items in the Fees tab of the Record portlet, or the Fees in the application intake form.

- [8271-Fees Recalculate Fees](#)
- [8104-Assess Fees](#)
- [8313-Fee Item Note](#)
- [8456-Fee Schedule Drop Down List](#)
- [8326-Fee Estimate](#)

Set the following FIDs for users to void fees, including invoiced fees, paid fees, and those fees related to point of sale.

- [8333-Void Invoiced But Unpaid Fee](#)
- [8348-Void Paid Fee](#)
- [8366-Void Payment](#)

To allow a supervisor to void any non-paid fees but restrict them from voiding paid fees, enable FID 8333 and disable FID numbers 8348 and 8366 (see [Figure 4: Configuring Authority to Void Fees](#)).

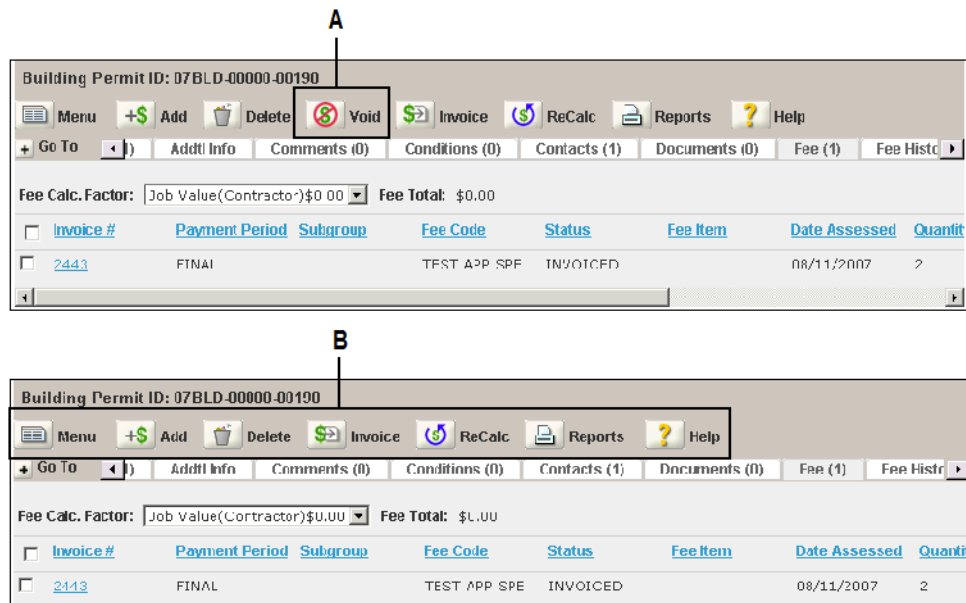


Figure 4: Configuring Authority to Void Fees

A. When FID 8333, 8348 and 8366 are enabled, the Void button is available.

B. When FID 8333, 8348 and 8366 are disabled, the Void button is not available.

If FID 8366 is enabled then 8333 should be enabled (Point of Sale functions).

If FID 8333 is enabled then 8348 should be enabled (Void record Fee functions).

Configuring Payments

Topics

- [Configuring the Payment Processing Portlet](#)
- [Configuring the Payment Tab](#)
- [Configuring the Point of Sale](#)
- [Accessing Automatic Payment Allocation](#)
- [Configuring Payment Account Type Options](#)
- [Configuring Credit Card and Check Type Options](#)

Configuring the Payment Processing Portlet

Users can use the Payment Processing portlet to process the payments for one or more records and POS items as a whole.

1. Set the following FIDs for the Payment Processing console:

- [8393-Payment Processing](#)
- [8415-Refund Payment](#)
- [8414-Void Payment](#)
- [8416-Invoices Management](#)

- [8394-Payment History](#)
 - [8417-Enable POS](#)
2. Set the following Standard Choices to configure the payment methods:
 - [PAYMENT_PROCESSING_METHOD](#)
 - [PAYMENT_PROCESSING_DEFAULT_METHOD](#)
 3. You can enable a Received drop-down list field on all payment locations in Civic Platform, such as the Payment Processing console or the Record Payment tab. This field displays the manner of payment receipt. Set the following Standard Choice:
 - [PAYMENT_RECEIVED_TYPE](#)
 4. You can define the receipt mask to use in the Payment Processing portlet. Set the following Standard Choice:
 - [PAYMENT_PROCESSING_RECORD_RECEIPT](#)

Configuring the Payment Tab

Your agency can determine whether to enable all of the options on the Payments tab in the user experience for a module, enable certain functions, or remove the Payments tab. When enabled, the Payment tab allows agency cashiers to locate and apply payments within an individual record. This tab displays in multiple modules within Civic Platform including Building, Sets, and Licenses.

1. Set the following FIDs for the functions in the Payment tab:
 - [8108-Cashier Payment](#)
 - [8435-Daily - Cashier - Pay More](#)
 - [8436-Daily - Cashier - Apply](#)
 - [8437-Daily - Cashier - Refund](#)
 - [8438-Daily - Cashier - Void](#)
 - [8439-Daily - Cashier - Generate Receipt](#)
 - [8440-Daily - Cashier - Fund Transfer](#)
2. Set the following FID and Standard Choice for automatic receipt generation:
 - [8108-Cashier Payment](#)
 - [AUTO_GENERATE_RECEIPT](#)
3. Set the following Standard Choice to allow users to transfer of payments to future invoices:
 - [ALLOW_PAYMENT_OF_FUTURE_FEES](#)

Configuring the Point of Sale

Point of sale fees work like all other fees in Civic Platform. You add, assess, and process a fee item through a cashier payment without an associated record or associated service request. Civic Platform

automatically invoices point of sale fee items so users can only add and void fee items. Civic Platform applies point of sale payments, without a payment apply screen.

1. Set the following FIDs:

- [8288-Fees Point Of Sale](#)
- [8289-Fees Point Of Sale Refunds](#)

2. Set the following Standard Choices in the order shown:



Note:

The POINT_OF_SALE_TYPE and POINT_OF_SALE_FEE_SCHEDULE Standard Choices each require Values and Value Descriptions for the point of sale feature to work.

- [POINT_OF_SALE_TYPE](#)
- [POINT_OF_SALE_FEE_SCHEDULE](#)

Note that currently, Citizen Access only supports fee items related to a record, not to a point of sale fee item. However, when Citizen Access does support point of sale fee items, enter USER=Public in the Value Desc field. Then enter a record ID to apply a dummy record ID for each fee item Value. The record ID must follow the format of xxxxx-xxxxx-#xxxx where xxxx is any alphanumeric value. For example, if Media is the Value, then the Value Desc field might look like this USER=Public;CapID=10POS-0000-#0000.

Accessing Automatic Payment Allocation

Set the following FID:

- [8463-Payment Auto Allocation](#)

Configuring Payment Account Type Options

You can configure Civic Platform to control the Account and Check Types options displayed in the Check Payment user page.

Set the following Standard Choice:

- [PAYMENT_CHECK_ACCOUNT_TYPE](#)

Configuring Credit Card and Check Type Options

You can define credit card types and check types so that your agency can accept payments from credit cards or from checks.

Set the following Standard Choice:

- [PAYMENT_CREDITCARD_TYPE](#)
- [PAYMENT_CHECK_TYPE](#)

Configuring Invoice Options

You can configure Civic Platform so that after a user assesses one or more fees for a record, Civic Platform automatically invoices the fees. Set the following Standard Choice:

- [AUTO_INVOICE_MODULE](#)

Set the following Standard Choice to configure a single invoice for multiple records:

- [ONE_INVOICE_FOR_ALL_CAPS](#)

You can configure Civic Platform so that users can collect all invoices for a workweek or given date range into a batch and print each invoice to mail to the responsible party. Set the following FID and Standard Choices:

- [8367-Manage Batch Invoice](#)
- [SINGLE_INVOICE_REPORT](#)
- [BATCH_INVOICE_REPORT](#)

Configuring Trust Accounts

Topics

- [Configuring Trust Account Management](#)
- [Configuring Trust Account Payment Method](#)

Configuring Trust Account Management

Set the following FIDs:

- [0190-Manage Trust Account](#)
- [0278-Associate People](#)
- [0279-Associate Address](#)
- [0280-Associate Parcel](#)
- [0331-Trust Account Associated Record](#)
- [8342-Auto Create Trust Account](#)

Set the following Standard Choices:

- [GLOBAL_TRUST_ACCOUNT](#)
- [TRUST_ACCOUNT_ADMINISTRATOR](#)

Configuring Trust Account Payment Method

Set the following FIDs:

- [8267-Enable Payment by Trust Account](#)
- [8286-Fees Print Receipt Summary](#)
- [8341-Auto Pay](#)
- [8465-Deposit Trust Account During the payment](#)

Set the following Standard Choices:

- [AUTO_PAY_TRUST_ACCOUNTS](#)
- [DEPOSIT_FOR](#)
- [PAYMENT_PROCESSING_DEFAULT_METHOD](#)
- [TRUST_ACCOUNT_ONLY](#)
- [PAYMENT_PROCESSING_METHOD](#)



Note:

Note that you must add the Trust Account field to the payment portlet, such as the Pay Form, in the Form Portlet Designer, to enable users to select a trust account during the payment process.

Configuring Cashier Workstation

Topics

- [Configuring a Cashier Drawer for ACA Public Users](#)
- [Configuring Cashier Sessions](#)

Configuring the Cash Drawer

You can configure Civic Platform to identify specific computers to accept payments, and identify which computers to be the cash drawer to receive payments.

Set the following FIDs and Standard Choices:

- [8261-Open Cash Drawer](#)
- [LIMIT_WORKSTATION_ACCEPT_PAYMENT](#)
- [CASHIER_STATION](#)

Configuring a Cashier Drawer for ACA Public Users

Citizen Access does not support Standard Choice CASHIER_STATION. However, You can assign Citizen Access public users an optional default Cashier ID in their user profile. You can assign a default Cashier ID for Citizen Access public users that do not have a Cashier assigned in their user profile.

Set the Standard Choices ACA_WORKSTATION_ID and ACA_TERMINAL_ID.

Table 48: Standard Choices for ACA Public User Cash Drawer

| Standard Choice | Standard Choice Value |
|--------------------|---|
| ACA_WORKSTATION_ID | A generic workstation ID to use for the default Citizen Access cashier drawer. |
| ACA_TERMINAL_ID | A generic terminal ID to use for the default Citizen Access for cashier drawer. |

Configuring Cashier Sessions

You can configure a cash drawer to run cashier sessions, open the cash drawer, print receipts with a receipt printer, and print endorsements on the back of checks.

You can also track the value of transactions recorded during a cashier session by entering the total in the Deposit Slip # field before ending the session. In the Deposit Date field, supervisors can use the date

picker icon to select a date or manually edit date, and after submittal, they can modify the Deposit Slip # and the Deposit Date fields.

1. Set the following FIDs and Standard Choices:

- [8251-Cashier Session](#)
- [8259-Cashier Session Supervisor](#)

2. Specify whether to capture the cash drawer by setting the Standard Choice as follows:

- [CASH_DRAWER_STARTING_ENDING_BALANCE](#)

Configuring Valuation Calculation

Set the following FIDs to enable valuation calculation for records:

- [8038-Valuation Calculation](#)
- [8406-Edit Valuation Calculator Unit Cost](#)

Configuring Void and Refund Reason Options

Set the following Standard Choices to define the reason options for users to select when they want to void an invoice or payment, or refund a payment:

- [REFUND_PAYMENT_REASON](#)
- [VOID_INVOICE_REASON](#)
- [VOID_PAYMENT_REASON](#)

Time Accounting Tracker

Related Links

- [Time Accounting Administration](#)
- [Configuring a List of Agency Vehicles](#)
- [Configuring the Time Accounting Portlet](#)
- [Adding Time Accounting Entries in Inspections and Workflow](#)

Time Accounting Administration

Set the following FIDs for administrators to configure the time accounting user profiles, time accounting types and time accounting groups:

- [0264-Admin Time Accounting Type](#)
- [0265-Admin Time Accounting User Profile](#)
- [0266-Admin Time Accounting Group](#)

Configuring a List of Agency Vehicles

To create the list of agency vehicles referenced in one-time accounting, configure Standard Choice VEHICLE to include any Standard Choice Values supported by your agency, such as a street cleaner or a dump truck. These Values display for the Civic Platform user in the Vehicle ID drop-down list.

- [VEHICLE](#)

Configuring the Time Accounting Portlet

Set the following FIDs to assign users rights to the Time Accounting portlet, so they can create and edit time accounting records:

- [8369-User Time Accounting Daily](#)
- [8375-Time Accounting Administrator](#)
- [8376-Time Accounting Supervisor](#)

Set the following Standard Choice to define the default Logged From date in the time accounting search portlet.

- [FIND_TIME_ACCOUNTING_LOGGED_DATE_RANGE](#)

Adding Time Accounting Entries in Inspections and Workflow

You can configure Time Accounting tracker to allow users to add multiple time accounting entries on inspections and workflow tasks, within Civic Platform and Mobile Office.

On the Inspections page and the Workflow page in Civic Platform, a Time Spent on Task section that provides hours for different time accounting groups. The time accounting fields that display are: Time spent on Inspection and Total time. For each task, Civic Platform lists Duration, Start and End Time, Group, and Type. An Actions drop-down list provides users with modify, delete, or lock and unlock options.

The Actions drop-down list does not display on entries that have a locked status by the Administrator.

Set the following FIDs:

- [8462-Time Accounting on inspections](#)
- [8470-Time Accounting on Workflow](#)

Streamlining Data Processing

Related Links

[Accessing Expression Builder](#)

[Configuring Conditions](#)

[Configuring Sets](#)

[Configuring Audit Log](#)

[Configuring the Batch Engine](#)

Accessing Expression Builder

Set the following FIDs:

- [0260-Expression Builder](#)

Configuring Conditions

Topics

- [Condition Administration](#)
- [Configuring the Condition Audit Log](#)
- [Configuring Required Condition Severity Status](#)
- [Managing Daily Conditions](#)
- [Managing Conditions of Approval](#)

Condition Administration

Set the following FIDs and Standard Choices for administrators to configure condition types, condition groups, standard conditions, and related condition settings:

- [0275-Condition by Group](#)
- [0054-Admin Condition Types](#)
- [0055-Admin Condition Status](#)
- [0056-Admin Condition Reference](#)
- [0058-Admin Workflow Condition Validation](#)
- [8138-Condition Limit Access by Dept](#)
- [CONDITIONS_OF_APPROVALS](#)
- [ENABLE_MULTIPLE_CONDITION_GROUP_FOR_TYPE](#)
- [CONDITION TYPE](#)

Configuring the Condition Audit Log

Set the following FIDs:

- [0333-Condition List Audit Log](#)
- [0334-Condition Detail Audit Log](#)

To enable the condition audit log, you must set the Standard Condition, the Record Condition and Reference Condition to Yes, as a prerequisite, in the Agency Profile settings.

Enable Application Name: Yes 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

Configuring Required Condition Severity Status

Civic Platform provides default status options, such as “Required” in the Severity drop-down list for conditions. The Severity drop-down list is available in portlets when defining conditions and when viewing the condition for a record. Each condition status provides a level of restriction.

Set the following Standard Choices:

- [REMOVE_REQUIRED_IN_ADMIN_CONDITIONS](#)
- [REMOVE_REQUIRED_IN_DAILY_CONDITIONS](#)

Managing Daily Conditions

Set the following FIDs to enable users to associate conditions with different types of records:

Table 49: FIDs for Condition Tabs

| Portlet | Required FIDs for Associated Condition Tab |
|-------------------------------|---|
| Addresses | 0208-Reference Address Condition History, 0069-Reference Condition Addresses, 8457-Create Free Form Condition |
| Assets | 8282-Asset Condition, 8457-Create Free Form Condition |
| Contacts | 0316-Reference Contact Condition, 0317-Reference Contact Condition History, 8457-Create Free Form Condition |
| Inspections | 8020-Condition Full Privileges, 8457-Create Free Form Condition |
| Licensed Professionals | 0070-Reference Condition Licensed Professionals, 8457-Create Free Form Condition |
| Owners | 0110-Reference Owner Condition, 0210-Reference Owner Condition History, 8457-Create Free Form Condition |
| Parcels | 0057-Reference Condition Parcels, 0209-Reference Parcel Condition History, 8457-Create Free Form Condition |
| Record | 8020-Condition Full Privileges, 8272-Application Condition History, 8266-Check reference object condition, 8457-Create Free Form Condition |
| Set | 8381-Address Set Condition, 8357-Set Conditions, 8386-Licensed Professional Set Condition, 8352-Parcel Set Create Conditions, 8457-Create Free Form Condition |
| Structures and Establishments | 0296-Structure and Establishment Condition, 8457-Create Free Form Condition |

Set the following FID to give users the option for child records to inherit conditions from their parent:

- [8365- Inheritable editable](#)

Set the following two FIDs for conditions in reference structures in Civic Platform Classic Daily:

- [0194-Access Structure Conditions](#)
- [0212-Reference Structure Condition History](#)

Set the following Standard Choices for configuring the options when adding daily conditions:

- [CLONE_REFERENCE_CONDITION](#)
- [UPDATE_REFERENCE_CONDITION](#)
- [ENABLE_ADD_MULTIPLE_CONDITIONS](#)

Set the following Standard Choices if you allow users to view conditions in partial records or the application intake form:

- [PARTIAL_CAP_CONDITION_ENABLE](#)
- [NEW_SPEAR_FORM_ENABLE](#)

Set the following Standard Choice if you only allow users to update the status date when a record satisfies a condition or condition of approval:

- [ENABLE_CONDITION_RESOLVED_DATE](#)

Set the following Standard Choice to allow users to use EMSE in Citizen Access to assign conditions to records:

- [ACA_CONDITION_AGENCY_USER](#) (see the *Citizen Access Administrator Guide*)

Managing Conditions of Approval

Set the following Standard Choice to enable the Conditions of Approval feature:

- [CONDITIONS_OF_APPROVALS](#)

Set the following Standard Choices and FIDs for configuring the Conditions of Approval feature:

- [8480-Conditions of Approval](#)
- [8481-Delete Conditions of Approval](#)
- [CONDITION_PRIORITIES](#)
- [REMOVE_REQUIRED_IN_ADMIN_CONDITIONS](#)
- [STATUS_OF_CONDITIONS_OF_APPROVAL](#)
- [ENABLE_CONDITION_RESOLVED_DATE](#)

Configuring Sets

The Set function lets you organize multiple Records, Parcels, Addresses, Licensed Professionals, random audits and even existing sets into a group, or set, and then use the group for batch processing. The set portlet displays a tab for each set type and provides set details that accommodate the functionality configured for each.

Set the FIDs for different set type according to the table below:

Table 50: FIDs for Set Types

| Set Type | Required FIDs |
|------------------------|---|
| Records | 8074-Set Header Maintenance, 8075-Set Detail Maintenance, 8121-Set Payment, 8356-Set Cloning, 8358-Set Comments, 8359-Set Scripts, 8362-Set Owners, 8361-Set Licensed Professionals, 8363-Set Contacts, 8364-Set Status Change, 8357-Set Conditions |
| Parcels | 8349-Parcel Set Detail, 8350-Edit Parcel Set Members, 8355-Parcel Set Execute Script, 8353-Parcel Set Create Owners, 8351-Parcel Set Create CAPs, 8381-Address Set Condition, 8352-Parcel Set Create Conditions |
| Addresses | 8378-Address Set Detail, 8379-Address Set Members, 8380-Address Set Comments, 8382-Address Set Execute Script |
| Licensed Professionals | 8383-Licensed Professional Set Detail, 8384-Licensed Professional Set Members, 8385-Licensed Professional Set Comments, 8387-Licensed Professional Set Execute Script, 8386-Licensed Professional Set Condition |
| Sets | 8370-Set of Sets Detail, 8371-Set of Sets Members, 8372-Set Analysis, 8373-Fee Analysis, 8374-Set of Sets Payment, 8404-Void Payment |
| Random Audits | 8422-Random Audit History, 8423-Random audit set, 8424-Re-generate/Delete Random Audit Set, 8425-Execute Script, 8426-Random Audit Supervisor |

Set the Standard Choices to add multiple EMSE scripts for each set type:

- [CAPSET_SCRIPT_LIST](#)
- [PARCELSET_SCRIPT_LIST](#)
- [ADDRESSSET_SCRIPT_LIST](#)
- [PROFESSIONALSET_SCRIPT_LIST](#)
- [AUDITSET_INSPECTION_SCRIPT_LIST](#)
- [AUDITSET_SCRIPT_LIST](#)

Set the additional two Standard Choices for random audit sets:

- [MODULE_AUDIT_FREQUENCY](#)
- [RANDOM_AUDIT](#)

Configuring Audit Log

Set the FIDs for users to view the audit logs for different records:

Table 51: FIDs for Audit Logs

| Record Type | Required FIDs for Enabling Audit Log |
|-------------|---|
| Conditions | 0333-Condition List Audit Log, 0334-Condition Detail Audit Log |
| Inspections | 8442-Inspection History Audit Log, 8468-Inspections List Guide Sheet Audit Log, 8469-Inspections Detail Guide Sheet Audit Log |
| Record | 8408-Edit Application Status History, 8444-Application Status History Log, 8410-Delete CAPs, 8443-Application Audit Log |

Configuring the Batch Engine

You can configure Civic Platform so users can schedule batch jobs and run batch jobs that automatically synchronize asset and GIS records or that automatically generate work orders from pm schedules.

Set the following FIDs and Standard Choices:

- [0284-Batch Job Maintenance](#)
- [0285-Batch Job Schedule](#)
- [BATCH_JOB_TYPE](#)
- [BATCH_JOB_SERVICE_CATEGORY](#)
- [BATCH_JOB_SCHEDULE_FREQUENCY](#)
- [BATCH_JOB_SCHEDULE_TYPE](#)
- [BATCH_JOB_STATUS](#)
- [BATCH_JOB_RESULT](#)
- [BATCH_JOB_PM_ADVANCE_PERIOD](#)

Land Management

Related Links

- [Configuring Structures and Establishments](#)
- [Configuring Enforcement and Case Management](#)
- [Configuring Plan Review](#)
- [Configuring Inspections](#)

Configuring Structures and Establishments

Topics

- [Structures and Establishments Administration](#)
- [Managing Reference Structures and Establishments](#)
- [Managing Associations with Structures and Establishments](#)

Structures and Establishments Administration

Set the following FIDs and Standard Choices for administrators to configure structures and establishments types and attributes:

- [0294-Structure and Establishment](#)
- [0158-Admin Attribute Definition](#)
- [0159-Admin Attribute Template Definition](#)

- [0269-Admin Attribute Form Layout Editor](#)
- [0305-Admin Attribute Table Definition](#)
- [STRUCTURE_ESTABLISHMENT_STATUS](#)
- [STRUCTURE_ESTABLISHMENT_LAND_USE](#)

Managing Reference Structures and Establishments

Set the following FIDs for users to manage reference structures and establishments:

- [0295-Reference Structure and Establishment](#)
- [0296-Structure and Establishment Condition](#)
- [0297-Structure and Establishment History](#)
- [TIME_MODULES](#)

Managing Associations with Structures and Establishments

Civic Platform includes associations between structures and establishments with different records, and different objects (such as documents, addresses, conditions, and so forth).

Set the FIDs for users to manage the association between structures and establishments (S&E) and different record types:

Table 52: FIDs for Association with Structures & Establishments

| Record Type | Required FIDs for Association with S&E |
|------------------------|---|
| Addresses | 0006-Reference Property Addresses |
| Owners | 0089-Reference Property Owners |
| Records | 8405-Structure and Establishment |
| Parcels | 0005-Reference Property Parcels |
| Licensed Professionals | 0371-Professional List |

Set the following Standard Choices:

- [STRUCTURE_APO_ASSOCIATION](#)
- [STRUCTURE_CAP_ASSOCIATION](#)
- [STRUCTURE_ESTABLISHMENT_APO_ASSOCIATION](#)

Configuring Enforcement and Case Management

Topics

- [Configuring the Evidence Portlet](#)
- [Configuring Complaint, Priority, and Address Types](#)

Configuring the Evidence Portlet

You can configure Civic Platform to enable various fields for enforcement and for case management. Much of the functionality involves the Evidence portlet.

Set the following Standard Choices:

- [EVIDENCE_TYPE](#)
- [EVIDENCE_LOCATION](#)
- [EVIDENCE_UNITS_MEASURE](#)
- [DISPOSITION](#)

Configuring Complaint, Priority, and Address Types

To streamline creation of case applications, you can configure Civic Platform to display set values in the Report Type, Priority, and Address Type fields.

Set the following Standard Choices:

- [COMPLAINT REFERRED TYPE](#)
- [PRIORITY](#)
- [AA_EDMS_DISALLOWED_FILE_TYPES](#)

Configuring Plan Review

Topics

- [Displaying Related and Renewal Record Documents](#)
- [Configuring Image Format](#)

Displaying Related and Renewal Record Documents

Administrators can configure the ability to display documents associated with related records or renewal records. For example, an agency can research a license record and can review the documents associated with both the current record and all the renewals for the license. After enabling this feature, you can access associated (child) documents in the record document detail area.

Set the following Standard Choice:

- [CAP_CHILD_DOCUMENT](#)

Configuring Image Format

You can associate display images with application type and with records. You can select an image in the Application Type page for an application type or in the Documents portlet for a record. When a record is also an instance of the application type, the display image associated with the record takes precedence.

You can configure Civic Platform to use image file formats different from the default format.

Set the following Standard Choice:

- [CAP_DETAIL_ICON_FILE_FORMATS](#)

Configuring Inspections

Topics

- [Inspection Administration](#)
- [Enabling Inspection Management](#)
- [Scheduling Inspections](#)
- [Assigning and Auto-Assigning Inspections](#)
- [Entering Guidesheet Items](#)
- [Resulting Inspections](#)
- [Planning Inspection Route Sheets](#)
- [Viewing Inspection Audit Logs](#)
- [Accessing Inspection Documents](#)
- [Configuring the GIS Button on the Inspection List Portlet](#)
- [Enabling External Inspectors to Work with Inspections](#)

Inspection Administration

Set the FIDs and Standard Choices for administrators to configure inspection types and groups, guidesheets, inspector profiles, and result groups.

Table 53: FIDs and Standard Choices for Inspection Administration

| Inspection Administration | Required FIDs and Standard Choices |
|-----------------------------|---|
| Inspection Types and Groups | 0133-Admin Inspection Type Sets, 0218-Admin Auto-Assign Inspection, 0229-Admin display Department, 0232-Admin display Option/Required column, 0288-Enable Inspection Flow, 0289-Enable Inspection Milestone |
| Inspection Guide Sheets | 0124-Admin Inspection Guide Sheet, 0125-Admin Inspection Guide Sheet Group, 0256-Carrying over Failed Guide Sheet Items, 0291-Guide Sheet Template Data |
| Inspection Result Group | 0123-Admin Inspection Result Group |
| Inspector Profiles | 0207-Admin Inspector Districts, INSPECTION_SETTING, INSPECTION_ROUTE_TYPE, USER_DISTRICTS, USER_DISCIPLINES, INSPECTOR_WORKLOAD_CALENDAR_TIME |

Enabling Inspection Management

Set the following FID and Standard Choice:

- [8400-Manage Inspection](#)
- [KEEP_COMPLETED_INSPECTION_ACTIVE](#)

Scheduling Inspections

Set the following FIDs and Standard Choices:

- [8143-Inspection Scheduling](#)
- [8241-Inspection New Inspection](#)
- [8255-Update Inspection Required/Optional Property](#)
- [8300-Inspections by Unit Number](#)
- [8467-Schedule Related Inspections](#)
- [8501-Display Desired Date Field](#)
- [BATCH_JOB_SERVICE_CATEGORY](#)
- [CREATE_NEW_INSPECTION_WHEN_RESCHEDULE](#)
- [INSPECTION_SETTING](#)

Assigning and Auto-Assigning Inspections

Set the following FIDs:

- [8147-Inspection Assignments](#)
- [8287-Auto-Assign Inspection](#)
- [8281-Inspector Districting](#)

Set the following Standard Choices:

- [GIS_BUFFER_DISTANCE](#)
- [ACA_AUTO_ASSIGN_INSPECTOR](#)
- [INSPECTOR_AUTO_ASSIGN_CRITERIA](#)

Entering Guidesheet Items

Set the following FIDs:

- [8343-Copy Guide Sheet](#)
- [8344-Carrying Over Failed Guide Sheet Items](#)
- [8149-Inspection Guide Sheet](#)
- [8315-Copy Inspection and Guide Sheet](#)

Resulting Inspections

Set the following FIDs and Standard Choices:

- [8145-Inspection Results](#)

- [8085-Inspection Email Notification](#)
- [8462-Time Accounting on inspections](#)
- [8144-Inspection Results Supervisor](#)
- [INSPECTION_SETTING](#)

Planning Inspection Route Sheets

To enable and configure the Inspection Route Sheet feature, set the following FIDs:

- [8146-Inspection Route Sheet](#)
- [8187-Inspection GIS Route Optimization](#)
- [8300-Inspections by Unit Number](#)

To enable optimized inspection routing such as routing inspections by driving, walking, or public transit, define the following FIDs and Standard Choices:

- [8496-Optimize Inspection Route](#)
- [INSPECTION_SETTING](#)
- [INSPECTION_ROUTE_TYPE](#)
- [ROUTE_OPTIMIZER_PROVIDER](#)
- [BATCH_JOB_SERVICE_CATEGORY](#)

Viewing Inspection Audit Logs

Set the following FIDs:

- [8442-Inspection History Audit Log](#)
- [8469-Inspections Detail Guide Sheet Audit Log](#)

Accessing Inspection Documents

Set the following FIDs:

- [8212-Upload EDMS Attachment](#)
- [8213-Download EDMS Attachment](#)
- [8214-View EDMS Attachment List](#)
- [8240-Delete EDMS Attachment](#)
- [8473-EDMS Document URL Link](#)

Configuring the GIS Button on the Inspection List Portlet

Set the following FID to define the display of the GIS button on the Inspection list portlet.

- [8495-Show Inspection Submitted Location](#)

Enabling External Inspectors to Work with Inspections

Set the following Standard Choice and FID if your agency has contract inspectors or self-certified inspectors complete inspections on behalf of your agency:

- [INSPECTION_RESULT_CSV_FORMAT](#)
- [8497-Result Inspections by CSV](#)

Asset Management

Related Links

- [Configuring Assets](#)
- [Configuring Part Inventory](#)
- [Configuring Work Orders](#)
- [Configuring Asset Condition Assessments](#)
- [Configuring PM Schedules](#)

Configuring Assets

Topics

- [Asset Administration](#)
- [Managing Assets](#)
- [Managing Associations with Assets](#)
- [Creating Work Orders from Assets](#)
- [Configuring Asset Group Update](#)

Asset Administration

Set the FIDs and Standard Choices for administrators to configure asset types and asset groups. Administrators can configure assets for users to access in all of the Accela solution modules.

Table 54: FIDs and Standard Choices for Asset Administration

| Asset Administration | Required FIDs and Standard Choices |
|----------------------|---|
| Asset Attributes | 0158-Admin Attribute Definition , 0159-Admin Attribute Template Definition , 0269-Admin Attribute Form Layout Editor , 0305-Admin Attribute Table Definition |
| Asset Types | 0160-Admin AMS Asset Definition , 0182-Admin GIS Attribute Mapping , 0252-Asset Type Available CAP Type , 0253-Asset GIS Synchronize , 0255-Manage Asset Type Security , 0274-Rating Type |
| Asset Groups | ASSET_GROUP |

| Asset Administration | Required FIDs and Standard Choices |
|----------------------|--|
| Asset Usage Types | 0326-Define Asset Usage Unit Type, ASSET_USAGE_UNIT_TYPE |
| Asset Size Units | ASSET_SIZE_UNIT |

Managing Assets

Set the following FIDs for users to add and manage assets:

- [8189-Asset Data Management](#)
- [8290-Calculate Asset Depreciation](#)
- [8312-Asset Clone](#)
- [8346-Parent Asset Dependency Flag](#)

Managing Associations with Assets

Civic Platform includes associations between assets with different records, information or objects (such as documents, addresses, conditions, and so forth).

Set the FIDs for users to manage the association between assets and different record types:

Table 55: FIDs for Association with Assets

| Record Type | Required FIDs for Association with Assets |
|----------------------|--|
| Addresses | 8201-Daily Asset Location |
| Condition | 8282-Asset Condition |
| Condition Assessment | 8308-Asset Condition Assessment Management |
| Contacts | 8031-Contacts |
| Documents | 8294-Asset Document Look up |
| Parts | 8402-Asset Associated Part |
| PM Schedules | 8262-Daily-Asset PM Schedule List |
| Ratings | 8399-Asset Rating |
| Usage | 8277-Asset Usage Tracking |

Creating Work Orders from Assets

Set the following FID:

- [8331-Create WO From Asset List](#)

Configuring Asset Group Update

You can enable updating of multiple assets, in the same asset group, with the same information.

Set the following FID:

- [8412-Asset Group Update](#)

Configuring Part Inventory

Topics

- [Part Administration](#)
- [Managing Part Inventory](#)
- [Managing Part Transactions](#)
- [Managing Associations with Parts](#)

Part Administration

Set the following FIDs for administrators to configure part item locations, vendors and manufacturers:

- [0213-Admin AMS Parts Item Location](#)
- [0214-Admin AMS Parts Vendors and Manufacturers](#)

Managing Part Inventory

Set the following FIDs and Standard Choices for users to add and manage parts:

- [8273-Parts Inventory](#)
- [PARTS_ALLOW_NEGATIVE_QUANTITY](#)

Managing Part Transactions

Set the following FIDs for users to manage part transactions:

- [8447-Part Transaction-Receive](#)
- [8448-Part Transaction-Transfer](#)
- [8449-Part Transaction-Adjust](#)
- [8450-Part Transaction-Reserve](#)
- [8451-Part Transaction-Void](#)
- [8274-Part Transaction-Issue](#)
- [8275-Parts Supply](#)

Managing Associations with Parts

Set the following FIDs:

- [8402-Asset Associated Part](#)
- [8276-Parts Contact](#)

Configuring Work Orders

Topics

- [Work Order Administration](#)
- [Creating Work Orders and Records](#)
- [Managing Associations with Work Orders](#)
- [Managing Work Order Tasks](#)
- [Accessing Work Order Assignments and Costs](#)
- [Configuring Work Order Production Tracking](#)

Work Order Administration

Set the FIDs and Standard Choices for administrators to configure work order types, groups and costs.

Table 56: FIDs and Standard Choices for Work Order Administration

| Work Order Administration | Required FIDs and Standard Choices |
|---------------------------------------|---|
| Work Order Cost Items and Cost Groups | 0161-Admin Work Order Costing Item Definition , 0170-Admin-WO Template Costing , 0330-Admin Work Order Costing Group Definition |
| Work Order Templates | 0169-Admin-Work Order Template , 0173-WO Template Part |
| Work Order Tasks | 0254-WO Task Definition |
| Work Order Types | 0306-Work Order Type |

Creating Work Orders and Records

Set the following FIDs for users to create work orders:

- [8279-New Mechanism to Create Work Order](#)
- [8331-Create WO From Asset List](#)

Managing Associations with Work Orders

Set the following FIDs:

- [8192-Work Order Parts](#)
- [8203-Daily Record Asset](#)
- [8280-Linking Work Order to PM Schedule](#)

Managing Work Order Tasks

You can configure Civic Platform to allow users to manage work order information associated with tasks.

Set the following FIDs and Standard Choices:

- [8338-WO Task tab on Work Order](#)
- [8339-Maintenance WO Task on Work Order](#)

- [WO_TASK_DURATION_UNIT](#)
- [WO_CLOSE_CHECK_TASK](#)

Accessing Work Order Assignments and Costs

Set the following FIDs to manage the assignments and costs in work orders, or distribute the costs:

- [8191-Work Order Costing](#)
- [8418-Work Order Cost Distribution](#)
- [8461-Show Work Order Cost Information](#)
- [8466-Daily Work Order Costing Group Definition](#)
- [8484-Cost Item Permission](#) (see “Managing Cost Item Permissions” in the *Civic Platform Administrator Guide*)

Configuring Work Order Production Tracking

Civic Platform provides a way for your agency to track Work Order Production information. This feature allows an agency to anticipate realistic expectations for a work crew with realistic estimated costs for completion. After you enter the actual work order cost, Civic Platform compares the actual data against a defined estimated standard. As a result, you can compare the costs and crew performance for a Work Order on an equal basis to the costs and crew performance from a different Work Order. The agency can review this information to solve problem, and make a budget, or make a plan.

Set the following FIDs and Standard Choices:

- [8336-Recalculate Production Units](#)
- [8337-Production History](#)
- [PRODUCTION_UNIT_TYPE](#)

Configuring Asset Condition Assessments

Topics

- [Asset Condition Assessment Administration](#)
- [Managing Condition Assessments](#)
- [Managing Associations with Condition Assessments](#)

Asset Condition Assessment Administration

Set the following FIDs for administrators to configure asset condition assessment types:

- [0227-Condition Assessment](#)
- [0274-Rating Type](#)

Managing Condition Assessments

Set the following FIDs for users to add and manage asset condition assessments:

- [8308-Asset Condition Assessment Management](#)

Managing Associations with Condition Assessments

Set the following FIDs:

- [8310-Asset Condition Assessment Linked Work Order](#)
- [8309-Asset Condition Assessment Observation](#)
- [8399-Asset Rating](#)

Configuring PM Schedules

Topics

- [Managing PM Schedules](#)
- [Generating Work Orders by PM Schedules](#)
- [Viewing PM Schedules Log](#)

Managing PM Schedules

Set the following FIDs for users to manage PM Schedules:

- [0195-Admin-PM Schedule](#)
- [0196-Admin-PM Schedule Linked Quick Query](#)
- [0197-Admin-PM Schedule Linked Asset](#)
- [0198-Admin-PM Schedule Skipped Asset](#)
- [0199-Admin-PM Schedule Hold Event](#)

Generating Work Orders by PM Schedules

Set the following FID:

- [0201-Admin-Generating Work Orders By PM Schedule](#)

Viewing PM Schedules Log

Set the following FID:

- [8278-PM Schedule Log](#)

License and Case Management

Related Links

[Configuring License Renewal](#)

[Configuring Expired Licenses and Insurance Coverage Verification](#)

[Configuring Licensed Professional Providers](#)

[Configuring Education](#)

[Accessing Continuing Education Records](#)

[Accessing Examination Records](#)

Configuring License Renewal

Set the following FID:

- [8398-Cap Renewal](#)

Configuring Expired Licenses and Insurance Coverage Verification

Topics

- [Associating Expired License Types with Record Types](#)
- [Configuring Expired License Notifications](#)
- [Accessing Education Records](#)

Associating Expired License Types with Record Types

Set the following FID:

- [0320-Admin License Verification](#)

Configuring Expired License Notifications

Set the following Standard Choice:

- [ENABLE_EXPIRED_LICENSE](#)
- [BATCH_JOB_SERVICE_CATEGORY](#). Use Send License Expired Email value.

If your agency implements Citizen Access and you want to display online notifications to public users logging in with an expired license or insurance, you must define additional Standard Choices Values for Standard Choice [ENABLE_EXPIRED_LICENSE](#).

For configuration details, refer to the “License Verification and Online Renewals” chapter in the *Citizen Access Administrator Guide*.

Configuring Licensed Professional Providers

You can configure Civic Platform to display the Provider option in the Licensed Professional drop-down list.



Note:

Civic Platform treats Education Providers as a specific type of Licensed Professional.

Set the following Standard Choice:

- [LICENSED PROFESSIONAL TYPE](#)

Configuring Education

Topics

- [Accessing Education Records](#)
- [Configuring the Education Degree Drop-down List](#)

Accessing Education Records

Set the following FIDs:

- [0310-Admin Education Info](#)
- [8420-Daily Education Info](#)
- [8421-Daily Delete Required Education](#)

Configuring the Education Degree Drop-down List

Set the following Standard Choice:

- [EDUCATION_DEGREE](#)

Accessing Continuing Education Records

Set the following FIDs:

- [0311-Admin Continuing Education Info](#)
- [8428-Daily Continuing Education Info](#)
- [8429-Daily Delete Required Continuing Education](#)

Accessing Examination Records

Set the following FIDs:

- [0312-Admin Examination Info](#)
- [8430-Daily Examination Info](#)
- [8431-Daily Delete Required Examination](#)

If you plan to use the Examination score upload functionality through Citizen Access, you also need to configure the related Standard Choice defining the Examination score CSV upload file parameters, and provide this information to the Examination Providers. For more information on Examination score upload requirements, refer to the “Certifications and Education” chapter in the *Citizen Access Administrator Guide*.

Configuring Reasons of Rescheduling or Cancelling Examination

Set the following Standard Choice:

- [REASON_FOR_RESCHEDULING_CANCELLING_EXAMINATION](#)

Citizen Access Administration

This chapter lists all the Standard Choices specific to Citizen Access administration. For more information, see [Standard Choices Reference](#).

- [ACA_AGENCY_EMAIL_REGISTRATION_TO](#)
- [ACA_AUTO_ASSIGN_INSPECTOR](#)
- [ACA_CONDITION_AGENCY_USER](#)
- [ACA_CONFIGS](#)
- [ACA_CONFIGS_LINKS](#)
- [ACA_CONFIGS_TABS](#)
- [ACA_CONNECT_LICENSE_AUTO_APPROVED](#)
- [ACA_EMAIL_REGISTRATION_TO](#)
- [ACA_EMAIL_REGISTRATION_FROM](#)
- [ACA_FILTER_CAP_BY_LICENSE](#)
- [ACA_PAGE_PICKER](#)
- [ACA_SPELL_CHECKER_ENABLED](#)
- [AGENCY_EMAIL_REGISTRATION_TO](#)
- [AUTHORIZED_SERVICE](#)
- [DEFAULT_JOB_VALUE](#)
- [DISPLAY_INSPECTION_COMMENT_IN_ACA](#)
- [E-MAIL_PAYMENT_NOTICE_DISABLE](#)
- [ENABLE_ANONYMOUS_REPORT](#)
- [ENABLE_AUTO_POPULATE_PARCEL_OWNER](#)
- [FIND APP DATE RANGE](#)
- [FOOD_FACILITY_INSPECTION](#)
- [ONLINE_PAYMENT_MAX_AMOUNT](#)
- [PAYMENT_GROUP](#)
- [REMOVE_PAY_FEE](#)
- [REPRINT_REASONS](#)
- [STATES](#)
- [UNIT TYPES](#)

- [WORKFLOW_CONFIGS](#)

Internationalization and Localization

Topics

- [Enabling Internationalization and Localization](#)
- [Supporting I18N Addresses Fields](#)
- [Configuring Phone Number Country Codes](#)
- [Setting ASI Fields to Right Justification](#)
- [Setting Report Language Preferences](#)

Enabling Internationalization and Localization

Set the following two Standard Choices to enable the internationalization and localization feature:

- [I18N_ADDRESS_FORMAT](#)
- [I18N_SETTINGS](#)

Supporting I18N Addresses Fields

You must enable and configure the following Standard Choices for displaying the Country, Gender and Salutation fields:

- [COUNTRY](#)
- [GENDER](#)
- [SALUTATION](#)

Configuring Phone Number Country Codes

As a system administrator, you can expand phone number fields to accommodate international phone and fax numbers in Civic Platform and Citizen Access. You must enable the following Standard Choices:

- [PHONE_NUMBER_IDD](#)
- [PHONE_NUMBER_IDD_ENABLESALUTATION](#)

Setting ASI Fields to Right Justification

Set the following Standard Choice to allow data in application-specific information fields to be entered and displayed from right-to-left for agencies whose primary language is Arabic.

- [ASI_ALIGNMENT_OPTIONS](#)

Setting Report Language Preferences

Set the following Standard Choice to enable reports to accommodate different languages:

- [REPORT_CRITERIA_LANGUAGE](#)

Standard Choices Reference

This section includes descriptions and acceptable values of common Standard Choices. This section does not include all Standard Choices.

For each Standard Choice, the reference provides the following sections:

Product. The product(s) that can apply the Standard Choice.

Type. You must select the correct type for a Standard Choice. Possible types are: System Switch, Shared drop-down, EMSE, Business Configuration.

Description. Provides an explanation of the operations associated with the Standard Choice.

DOCUMENT_REVIEW_STATUS (User-defined Name)

Product

Civic Platform

Type

Business Configuration - Document Review Status

Description

You can add one or more Standard Choices of the Business Configuration - Document Review Status type, each with a unique Standard Choice name. The Standard Choice names are the document review status group names.

To configure document review statuses in a document review status group, add Standard Choice Values in the Standard Choice of the group. Each Standard Choice Value represents a document review status.

The value description of a Standard Choice Value (document review status) can be either empty (default) or "Validation Required". If you set a document review status as "Validation Required", when users update a document review task to the status, Civic Platform validates whether all the required checklist items related with the task are complete (that is, their statuses must be of the Approved result type).

DOCUMENT_STATUS (User-defined Name)

Product

Civic Platform

Type

Business Configuration - Document Status

Description

This Standard Choice defines a document status group.

You can specify a unique document status group name in the Standard Choice name. Each document status group can have several values, each value representing a document status. You can create multiple document status groups for different types of documents, and associate the document status groups with the corresponding document types.

EDMS_FUNCTION (User-defined Name)

Product

Mobile Office

Type

Business Configuration - URL Links on AMO

Description

This Standard Choice defines the Electronic Document Management System (EDMS) functions that users can perform against a document in Mobile Office, such as viewing the history of the document and checking out the document from the EDMS. You can specify a unique name in the Standard Choice name. See [Figure 5: Standard Choice Example](#) as an example.

Standard Choices - Add

Use this form to add a Standard Choices Item.

Standard Choices Item Name * : EDMS_FUNCTION

Description: (250 char max)

Status * : Enable Disable

Type * : System Switch Shared drop-down EMSE Business Configuration

URL Links on AMO

Submit Cancel

Figure 5: Standard Choice Example

Standard Choice values can include:

{EDMS function name.}

The value defines the name of the EDMS function, which appears in the Actions drop-down menu next to each downloaded or submitted document in Mobile Office.

Value Description:

EDMS=<Vendor Name>;URL=<URL of the target web service>\$parameter\$&\$parameter\$

The value description defines the source of the EDMS web service and the parameters whose values the system captures in runtime and passed to the EDMS web service. Make sure that the EDMS vendor name is exactly the same as one of the Standard Choice values you define in the Standard Choice [EDMS](#). And append any of these parameters surrounded by the "\$" sign to the end of the URL. For a list of supported parameters, see [Table 57: Supported Parameters for EDMS Functions](#).

Table 57: Supported Parameters for EDMS Functions

| Parameter | Description |
|------------------|--|
| \$DocumentId\$ | Document ID or File Key |
| \$AltID\$ | Alternate Record ID |
| \$UserID\$ | User ID |
| \$UserFullName\$ | User's full name |
| \$SPCode\$ | Agency name |
| \$Today\$ | Current date |
| \$LanguageId\$ | Login language abbreviation, e.g., EN-US |

State/Province (User-defined Name)

Product

Civic Platform, Citizen Access

Type

Business Configuration - State/Province

Description

This Standard Choice defines a list of states or provinces that can be available for selection in the State (or Province) drop-down list across Civic Platform and Citizen Access.

You can specify a unique name as the Standard Choice name (the name of the State list). The Standard Choice name appears as an option of the State/Province drop-down list in the Regional Settings portlet. The administrator can relate the State list to a country or region in the Regional Settings portlet. When the user selects that country or region in a form like the Contact Address intake form, Civic Platform populates the corresponding states from the specified State list in the State (or Province) drop-down list. See [Figure 6: Define the State List for the United States](#) for an illustrative example.

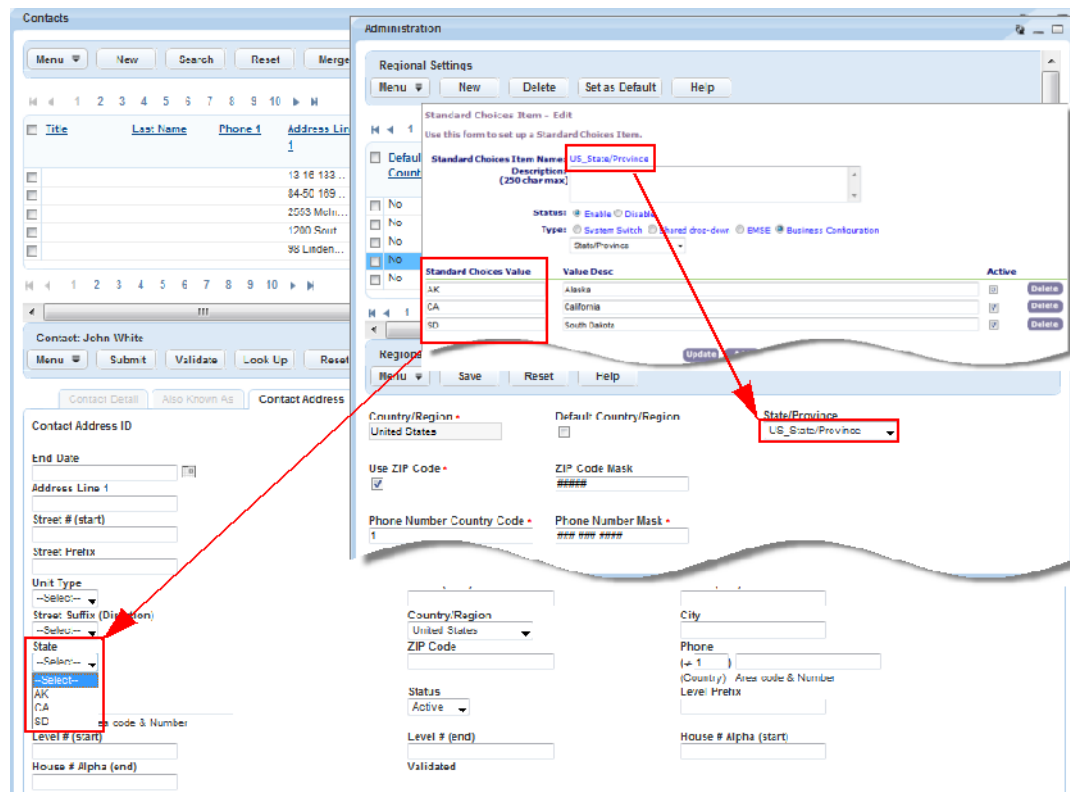


Figure 6: Define the State List for the United States

Standard Choice values can include:

{Enter the names of the states or provinces.}

AK

CA

SD

Value Descriptions:

{Enter description of the state or province.}

Alaska {for the Standard Choice value "AK"}

California {for the Standard Choice value "CA"}
 South Dakota {for the Standard Choice value "SD"}

VIRTUAL FOLDERS (User-defined Name)

Product

Civic Platform

Type

Business Configuration - Virtual Folder

Description

This Standard Choice defines a virtual folder group.

You can specify a unique virtual folder group name as the Standard Choice name. Each virtual folder group can have several values, each value representing a virtual folder. You can create multiple virtual folder groups, that correspond to different record types, and you can associate the appropriate virtual folder group to its corresponding record type.

AA_EDMS_DISALLOWED_FILE_TYPES

Product

Civic Platform, Mobile Office, and Accela Wireless



Note:

ACA_EDMS_DISALLOWED_FILE_TYPES in the Standard Choice [ACA_CONFIGS](#) specifies disallowed file extensions for Citizen Access.

Type

System Switch

Description

This Standard Choice specifies the disallowed file extensions for uploading to EDMS.

Table 58: AA_EDMS_DISALLOWED_FILE_TYPES Standard Choice Values

| Standard Choice Values | Value Description | Description |
|-------------------------------|--|---|
| AA_EDMS_DISALLOWED_FILE_TYPES | Enter a list of file extensions. For example: .html; .htm; .mht; .mhtml. | The value lists all the disallowed file extensions, separated by semicolons to separate the file extensions. Do not insert a space before or after the semicolon. If you do not specify an extension, the system allows all file types. |

ACA_AGENCY_EMAIL_REGISTRATION_TO

Product

Citizen Access

Type

System Switch

Description

This Standard Choice enables the feature that sends an “activation required email” to an agency employee. The email is a notification that the public user does not meet the basic requirements for automatic activation.

**Note:**

Pay attention to the difference between this Standard Choice and [AGENCY_EMAIL_REGISTRATION_TO](#).

ACA_AUTO_ASSIGN_INSPECTOR

Product

Citizen Access, IVR

Type

System Switch

Description

This Standard Choice defines the criteria for auto-assigning inspections in Citizen Access and IVR. Configure this Standard Choice to prevent inspections from being auto-assigned if no inspector is available with the appropriate discipline or in the appropriate district.

You must clear the cache in Citizen Access after you configure this Standard Choice.

Table 59: ACA_AUTO_ASSIGN_INSPECTOR Standard Choice Values

| Standard Choice Values | Value | Description |
|--|-------|--|
| BLOCK_SCHEDULE_WHEN_NO_INSPECTOR_FOUND | Y/N | <p>Yes. When you set this Standard Choice value to Y (Yes), Citizen Access prevents users from scheduling inspections when an appropriate inspector is not available by blocking the times on the calendar. IVR prevents users from scheduling inspections and notifies the user that an appropriate inspector is not available.</p> <p>No. When you set this Standard Choice value to N (No), Citizen Access and IVR allow users to schedule inspections when an appropriate inspector is not available, but leaves the inspector field blank. A supervisor can then choose an inspector, based on the supervisor's discretion.</p> |

ACA_CACHE_CONFIG

Product

Citizen Access

Type

System Switch

Description

This Standard Choice enables the ability to move global data, including labels and system settings into cache in a .NET layer to provide the ability to share this data and improve performance when multiple users access the data.

You can specify the cached object in the Standard Choice value, and then define the time when the cached object expires and is removed from the cache. The time unit is second.

The cached object can be labels, server constant, SmartChoice group, Standard Choice, and template.

Table 60: ACA_CACHE_CONFIG Standard Choice Values

| Standard Choice Values | Value Description | Description |
|------------------------|--|---|
| LABELS | ExpirationTime;Description. For example: 1800;label description. | The value description defines the time at which the cached object expires and is removed from the cache. The time unit is second. |
| SERVER_CONSTANT | ExpirationTime;Description. For example: 1800;server constant description. | Optionally, you can provide the description about each cached object. |
| SMART_CHOICE_GROUP | ExpirationTime;Description. For example: 1800;smart choice description. | |
| STANDARD_CHOICE | ExpirationTime;Description. For example: 1800;Standard Choice description. | |
| TEMPLATE | ExpirationTime;Description. For example: 1800;template description. | |

ACA_CONDITION_AGENCY_USER

Product

Citizen Access

Type

System Switch

Description

This Standard Choice provides the ability to assign conditions to records by EMSE when public users create records.

Enter a valid department name in the Standard Choices Value field. If an EMSE script assigns a condition to a record created in Citizen Access, the script must read the Standard Choice value and set the department name for the public user first.

ACA_CONFIGS

Product

Citizen Access

Type

System Switch



Description


This Standard Choice controls most Citizen Access features.

Table 61: ACA_CONFIGS Standard Choice Values

| Standard Choice Values | Value Description | Description |
|------------------------|---------------------|--|
| ACA_DEFAULT_CASHIER_ID | Enter a cashier ID. | Citizen Access assigns the cashier ID to all public users that do not have a Cashier ID in their user profile, and uses the Cashier ID to generate a unique receipt for each payment made by the user. |

| Standard Choice Values | Value Description | Description |
|--------------------------------------|---|--|
| ACA_DEFAULT_COUNTRY | Enter a full country name. Default: United States. | GIS uses the country to locate an address on Bing Maps if the public users do not provide a country name with the address they want to locate. |
| ACA_EDMS_DISALLOWED_FILE_TYPES | Enter a list of file extensions, each separated by semicolon, with no space between the semicolon and the extension before or after it. For example: .html;htm;mht;mhtml. | The list of file extensions include all the disallowed file types when public users upload files to Citizen Access. If the value description is empty or not defined, public users can upload all files types. |
| ACA_SITE | Enter the URL of the Citizen Access Setup. For example, http://\$acaserver\$/\$acasite\$/Admin/Login.aspx. | This value specifies the login URL of your Citizen Access site. |
| ACA_TERMINAL_ID | Enter the ID name or number that identifies the terminal assigned to the ACA default cashier (ACA_DEFAULT_CASHIER_ID) to accept payments. | Citizen Access uses this value with ACA_WORKSTATION_ID to generate a unique receipt for each payment made by public users. |
| ACA_WORKSTATION_ID | Enter the workstation assigned to the ACA default cashier (ACA_DEFAULT_CASHIER_ID) to accept payments. | Citizen Access uses this value with ACA_TERMINAL_ID to generate a unique receipt for each payment made by public users. |
| ALL_USER_SCHEDULE_INSPECTION_ENABLED | Yes, No NO_ANONYMOUS_USER | This value provides the types of users that can schedule inspections. Yes enables ALL users, including anonymous users, to schedule an inspection. No only allows owners or licensed professionals for the permit to schedule an inspection. NO_ANONYMOUS_USER allows any registered user, citizen or licensed professional, to schedule an inspection. |
| ASI_LABEL_WIDTH | Enter a numeric value. Default: 25. | The numeric value controls the number of characters that display per line on an ASI field label. This is particularly useful to control label width for the alternative ASI labels that you choose to use for Citizen Access, to accommodate the ability to ask questions during the application intake process. |
| AUTO_POPULATE_STATE | Yes, No | Yes displays the licensing state as the default value in the State drop-down list when a user is registering for an account; No displays an empty (-Select-) value. |
| CONTINUE_SHOPPING_ENABLE | Yes, No | Yes displays the Continue Shopping button on the Pay Fees page in the application intake form; No hides the button. |
| CREATE_APPLICATION_MODEL | 2, any other value | This value controls whether public users handle payments on the Review Information page or on the Pay Fees page. If the value description is 2, Citizen Access triggers the EMSE event ApplicationSubmitAfter when the Review Information page loads, and public users handle payment on the page. |

| Standard Choice Values | Value Description | Description |
|------------------------------|-------------------------------|--|
| | | If the value description is any other value, Citizen Access triggers the EMSE event ApplicationSubmitAfter after public users click the Continue Application button on the Review Information page and before the Pay Fees page loads. Public users handle payment on the Pay Fees page. |
| DEFAULT_CONTACT_ADDRESS_TYPE | Enter a contact address type. | This value defines the default contact address type for all the Contact Address sections in the Citizen Access website. |
| DEFER_PAYMENT_ENABLED | Yes, No | Yes displays the Defer Payment button on the payment page (which may be Review Information or Pay Fees page. See CREATE_APPLICATION_MODEL); No hides the button. |
| DESCRIPTION_REQUIRED_FLAG | Yes, No | Yes flags the General Description and Detailed Description fields as required; No removes the required flag on the General Description and Detailed Description fields. |
| DISPLAY_OPTIONAL_INSPECTIONS | Yes, No | Yes displays the optional inspections; No hides the optional inspections. |
| DISPLAY_OWNER_INFORMATION | Yes, Y No, N | <p>This value allows you to hide owner searches and owner information from Citizen Access. Yes or Y enables owner searches and displays owner information. No or N disables public users to do any of the following:</p> <ul style="list-style-type: none"> • Perform owner searches on the Look Up Property Information page, the GIS Search panel, or the Owner section of an application intake form. <ul style="list-style-type: none">  Note: The Data Source property for the Owner component in a page flow also determines whether public users can perform owner searches on an application intake form. This Standard Choice setting selectively overrides the Data Source property setting. When this Standard Choice value is set to No but the Data Source property is set to “Reference” or “No Limitation”, the Owner section of the application intake form allows public users to add an owner manually but does not display a Search button. • Access owner information associated with property from various places such as: <ul style="list-style-type: none"> • The Global Search results • The Parcel Detail, Record Detail, Trust Account Detail, or Enter Work Location page • An expanded address, parcel, or record in the GIS Search result panel or the GIS Contents panel • The window popped up after public users perform the Show Record map command against a GIS object.  Note: The Record Detail Section Configuration on the Module Settings page also determines which public user roles can access owner information on the Record Detail page. This setting overrides the Standard Choice setting. For example, if the module settings enable only record creators to access the Owner section of the Record Detail page but this Standard Choice value is set to No, only the record creator can access owner information from the Record Detail |

| Standard Choice Values | Value Description | Description |
|--------------------------------------|----------------------------------|---|
| | | <p>page for his or her records. All the other public users have no access to that owner information.</p> <ul style="list-style-type: none"> Copy the owner information from the Record Detail page to a new record, if public users cannot access the Owner section of the Record Detail page. Search for and select an address or a parcel to fill in an application intake form and make the Owner section auto-populated with the owner associated with the address or the parcel. <p> Note: Accela recommends that you manually clear cache data through the GIS Administration site after you change this Standard Choice value. So the change can immediately take affect in the map opened from Citizen Access. Otherwise, the change does not take effect until the GIS Administration site automatically clears the cache every hour.</p> |
| DISPLAY_QUICK_QUERY | Yes, No. Default value is No. | <p>This value defines whether the quickquery dropdown list shows or hides in the My Permit List section on the module Record Home pages.</p> <p>Yes displays the quickquery dropdown list if at least one quickquery for the ACA My Permit List portlet is assigned to the current module in the Global QuickQueries administration portlet.</p> <p>No always hides the quickquery dropdown list.</p> |
| DISPLAY_REQUEST_TRADE_LICENSE_FILTER | Yes, Y No, N | <p>This value allows public users to quickly access the trade license request page from the record page.</p> <p>Yes or Y displays the “Request a Trade License” option in the Application Status section on the Module Settings page. If you mark the option of a specific application status, when the application reaches the status, the record page displays the “Trade License/Initial Approval” link under the Action column. The link provides a quick access to trade license request page for public users.</p> <p>No or N hides the “Request a Trade License” option from the Application Status section on the Module Settings page.</p> |
| ENABLE_AUTO_INVOICE | Yes, No Default value is Yes. | <p>If you do not add the module of the application in the Standard Choice AUTO_INVOICE_MODULE, and set ENABLE_AUTO_INVOICE to No, public users only need to pay the fee items with Auto Invoice as Y. For the fee items with Auto Invoice as N, users must go to Civic Platform to view, invoice or pay. In other configuration scenarios, public users must pay all the fee items regardless of the Auto Invoice setting.</p> |
| ENABLE_BROWSER_DETECT | Yes, No Default value is No. | <p>This value defines whether or not public users can see the unsupported browser warning when they first log in to Citizen Access with an unsupported browser or browser version.</p> <p>Yes turns on the unsupported browser warning.</p> <p>No turns off the unsupported browser warning.</p> |
| ENABLE_CUSTOMIZATION_PER_PAGE | Yes, No | <p>Only when the value description is Yes, administrators can apply customized CSS style sheet or JavaScript file for a page in the Citizen Access website. By default, the Standard Choice Value is No.</p> |

| Standard Choice Values | Value Description | Description |
|--|--|--|
| ENABLE_EXPAND_IN_REVIEW_PAGE | Yes, Y No, N | This value controls whether administrators can configure the default view of the sections on the Review Information page. Yes enables the Expanded property of the sections (excluding the Record Type section) on the page. Administrators can set the property to True or False (default value). Nodisables the Expanded property. |
| ENABLE_LDAP_AUTHENTICATION | Yes, No | This value controls whether Citizen Access applies LDAP authentication. Yes enables LDAP authentication and hides the password-related fields on the Login Information section: Password, Type Password Again, Select a Security Question, and Answer. |
| GIS_PORTLET_URL | Enter the URL for the GIS server. | This value allows public users to access the GIS viewer. |
| HIDE_CONTACT_GENERIC_TEMPLATE_FOR_CITIZEN_REGISTRATION | Yes, No. Default value is No. | This value defines whether the Contact Information section in the registration displays the contact generic template fields (including ASI fields and ASI table) that are associated with the contact type that the public user selected. Yes hides the contact generic template fields. No hides the contact generic template fields. |
| INSPECTION_CALENDAR_NAME | Enter an inspection calendar name. For example, to use the Civic Platform Inspection Blockout calendar, enter Inspection Blockout. | Citizen Access uses the calendar for scheduling inspections. |
| LOGIN_ENABLED | Yes, No | Yes displays the Login link on the Home page. No removes it. |
| NEW_GIS_PORTLET_URL | Enter the URL to the 7.3.3 AGIS server, for example: http://agis2.accela.com/agis/ . | To enable the GIS map integration with the new ACA UX template available in 7.3.3, configure this Standard Choice. |
| NO_SAVEANDRESUME_LATER_BUTTON_MODULE | Enter a module name. | This value provides the ability to hide the “Save and Resume” buttons by module. |
| PA_EMAIL_VERIFICATION | Yes, No | Yes enables and sends the activation e-mail to the public user. No disables it. |
| REGISTRATION_ENABLED | Yes, No | Yes displays the Register for an Account link on the Home page. No removes it. Yes is the default. |
| V360_WEB_ACTION_USERNAME | Enter a username from the designated universal user profile for reporting. | V360_WEB_ACTION_USERNAME and V360_WEB_ACTION_PASSWORD link a universal user profile with reporting permissions to Citizen Access, and enable a citizen to successfully run reports. |
| V360_WEB_ACTION_PASSWORD | Enter the password from the designated universal user profile for reporting. | |

ACA_CONFIGS_LINKS

Product

Citizen Access

Type

System Switch

Description

This Standard Choice configures the links that appear in the following two places:

- In the block sections at the bottom of the welcome pages (Welcome Global and Welcome Registered)

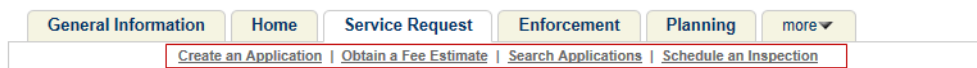
| | |
|---|--|
| General Information Lookup Property Information Search for a Provider/Education Search for a Licensee Search for a Food Facility Search for Certified Businesses Search Documents by Geographic Location | Service Request Create an Application Obtain a Fee Estimate Search Applications Schedule an Inspection |
| Enforcement Create an Application Search Applications | Planning Search Applications |
| Licenses Apply for a License Create an Application by Selecting Services Obtain a Fee Estimate Manage My Licenses Schedule an Inspection | Case Management Submit a Complaint Submit a Complaint Obtain a Fee Estimate Search Complaints Schedule an Inspection |
| Amendments Create an Application Create an Application by Selecting Services Obtain a Fee Estimate Search Applications Schedule an Inspection | |



Note:

Whether a block section displays relies on the blockvisible value of the corresponding Standard Choice Value in [ACA_CONFIGS_TABS](#). If a block section hides, all the links in the block section hide no matter how you configure [ACA_CONFIGS_LINKS](#).

- Below the module tab bar.



Each Standard Choice Value defines a link and refers to a feature available in certain module or category. You must add a Standard Choice Value in the pre-defined way to enable the corresponding link (for more information, see [Table 62: ACA_CONFIGS_LINKS Standard Choice Values](#)). If you deactivate or remove a Standard Choice Value, the corresponding link hides.



Note:

The enable and disable statuses of the Standard Choice Values are in synchronization with the General > Feature Settings configuration for the corresponding features in ACA Admin.

Table 62: ACA_CONFIGS_LINKS Standard Choice Values

| Module/Category | Feature/Link | Corresponding Standard Choice Value |
|---|--|---|
| General Information | Search for Certified Business | APO_CertifiedBusinessSearch |
| | Search for a Provider/Education | APO_EducationSearch |
| | Search for a Food Facility | APO_FoodFacilityInspectionSearch |
| | Search for a License | APO_LicenseeSearch |
| | Lookup Property Information | APO_SEARCH |
| | Search Documents by Geographic Location | APO_SearchDocument |
| Amendments | Create an Application | Amendments_Apply |
| | Create an Application by Selecting Services | Amendments_ApplyByService |
| | Obtain a Fee Estimate | Amendments_ObtainFeeEstimate |
| | Schedule an Inspection | Amendments_ScheduleAnInspection |
| | Search Applications | Amendments_Search |
| Any available module, for example, Building, Planning | Create an Application (or Apply for a License) | [Module]_Apply, for example, Building_Apply |
| | Create an Application by Selecting Services | [Module]_ApplyByService, for example, Building_ApplyByService |
| | Obtain a Fee Estimate | [Module]_ObtainFeeEstimate, for example, Building_ObtainFeeEstimate |
| | Schedule an Inspection | [Module]_ScheduleAnInspection, for example, Building_ScheduleAnInspection |
| | Search Applications (or Manage My Licenses) | [Module]_Search, for example, Building_Search |

The Value Desc field defines the page that each link (Standard Choice Value) directs to. Add the value description in the following format:

```
label=[label key], order=[order number], role=[roles],
forcelogin=[forcelogin], url=[url], module=[module name]
```

Of the values:

- label=[Type the system required label for the feature/link, as provided in [Table 63: Feature Labels and URLs in ACA_CONFIGS_LINKS](#)]
- order=[Enter the numeric order of display]. 0 is first.
- role=[0, 1, or 0|1] Specify whether the tab displays on registered user pages (the Welcome Registered page), anonymous user pages (the Welcome Global page) or both. Type 0 for Registered User pages only, 1 for Anonymous Users pages only, or 0|1 for both registered and anonymous user pages.
- forcelogin=[Enter yes or no.] The forcelogin value determines whether users need to log in before accessing the associated link. If the value is yes, then users who have not already logged in are prompted to do so. If the value is no, then anonymous users can access the link.
- url=[Enter the URL for the feature/link, as provided in [Table 63: Feature Labels and URLs in ACA_CONFIGS_LINKS](#)].

The Search Applications link directs to the module home page. You can add the following parameters in the URL to further customize the module page that displays when users click the link:

- **\$ShowMyPermitList\$**. If the parameter value is Y or undefined, the My Permit List section displays on the module home page. If the parameter value is N, the section hides.
- **\$SearchType\$**. This parameter defines the default search options of the Record Search section on the module home page.
 - **SearchType=NULL**: The Record Search section applies the first search option as the default search option.
 - **SearchType=None**: The Record Search section hides the whole search section.
 - **SearchType=General**: The Record Search section applies the general search as the default search option.
 - **SearchType=ByAddress**: The Record Search section applies the Search by Address as the default search option.
 - **SearchType=ByLicense**: The Record Search section applies the Search by License as the default search option.
 - **SearchType=ByPermit**: The Record Search section applies the Search by Permit as the default search option.
 - **SearchType=ByTradeName**: The Record Search section applies the Search by Trade Name as the default search option.
 - **SearchType=ByContact**: The Record Search section applies the Search by Contact as the default search option.
- **module=[Type The name of the module, such as Building or Planning.]**

Table 64: Sample ACA_CONFIG_LINKS Configuration provides a few examples of ACA_CONFIG_LINKS Values and their effects.

Table 63: Feature Labels and URLs in ACA_CONFIGS_LINKS

| Feature/Link | Label | URL |
|--|---|---|
| Search for Certified Business | aca_home_label_searchfor_certbusiness | url=/GeneralProperty/PropertyLookUp.aspx |
| Search for a Provider/ Education | aca_sys_education_search_link | url=/GeneralProperty/PropertyLookUp.aspx |
| Search for a Food Facility | aca_home_label_searchfor_foodfacility | url=/GeneralProperty/PropertyLookUp.aspx? isFoodFacility=Y |
| Search for a License | aca_sys_licensee_search_link | url=/GeneralProperty/PropertyLookUp.aspx? isLicensee=Y |
| Lookup Property Information | aca_sys_apo_search_link | url=/APO/APOLookup.aspx |
| Search Documents by Geographic Location | aca_sys_apo_search_document | url=/GeneralProperty/PropertyLookUp.aspx? isSearchDocument=Y |
| Create an Application | aca_sys_feature_apply_a_permit | url=/Cap/CapApplyDisclaimer.aspx |
| Create an Application by Selecting Services | aca_sys_feature_apply_a_permit_by_service | url=/Cap/CapApplyDisclaimer.aspx? createRecordByService=yes |
| Obtain a Fee Estimate | aca_sys_feature_feeestimate | url=/Cap/UserLicenseList.aspx? stepNumber=0&isFeeEstimator=Y |
| Schedule an Inspection | aca_sys_feature_schedule_an_inspection | url=/Cap/CapHome.aspx? IsToShowInspection=yes |

| Feature/Link | Label | URL |
|---------------------|----------------------------|-----------------------|
| Search Applications | aca_sys_feature_search_all | url=/Cap/CapHome.aspx |

Table 64: Sample ACA_CONFIG_LINKS Configuration

| Standard Choice Value | Value Description | Page Associated with the Value |
|-----------------------|--|---|
| APO_SEARCH | label=aca_sys_apo_search_link, order=0, role=0 1, forcelogin=no, url=/APO/APOLookup.aspx, module=building | Enables the Lookup Property Information link in the General Information section on the Welcome Registered page and below the General Information tab bar. |
| BUILDING_SEARCH | label=aca_sys_feature_search_all, order=2, role=0 1, forcelogin=NO, url=/Cap/CapHome.aspx? module=Building& SearchType=ByAddress | Enables the Search Applications link in the General Information section on the Welcome Registered page and below the General Information tab bar. The module home page associated with the link contains both the My Permit List section and the General Search section, and the default search option in the General Search section is Search by Address. |

ACA_CONFIGS_TABS

Product

Citizen Access

Type

System Switch

Description

This Standard Choice configures the visibility of tabs at the top of the home page and defines the page that displays when users click a tab.

You can enter any text in a Standard Choice Value to represent a tab, for example:

Home

Building

APO

Licenses

ServiceRequest

The Value Desc field defines the page that each tab (Standard Choice Value) directs to. Add the value description in the following format:

```
label=[info], order=[info], role={info}, url=[info], module=[module name],
tabvisible=[info], blockvisible=[info].
```

Of the values:

- Label determines the tab name.
 - To display the Home tab, set the label to aca_sys_default_home
 - To display the general information tab, set the label to aca_sys_apo_search]
 - To display a module tab, set the label to aca_sys_default_module_name. The label gets the tab name from the module value in the value description.

- order=[Enter the numeric order of display] 0 is first.
- role=[0, 1, or 0|1] Specify whether the tab displays on registered user pages (the Welcome Registered page), anonymous user pages (the Welcome Global page) or both. Type 0 for Registered User pages only, 1 for Anonymous Users pages only, or 0|1 for both registered and anonymous user pages.
- URL=[Provide the URL for the tab]
Which URL to enter depends on which feature you want to make available to users when they click the tab. For the association between features and URLs, see [Table 63: Feature Labels and URLs in ACA_CONFIGS_LINKS](#).
If you assign the URL to the Search Applications feature which directs to the module home page, you can add the following parameters in the URL to further customize the module page that displays when users click the tab:
 - \$ShowMyPermitList\$. If the parameter value is Y or undefined, the My Permit List section displays on the module home page. If the parameter value is N, the section hides.
 - \$SearchType\$. This parameter defines the default search options of the Record Search section on the module home page.
 - SearchType=NULL: The Record Search section applies the first search option as the default search option.
 - SearchType=None: The Record Search section hides the whole search section.
 - SearchType=General: The Record Search section applies the general search as the default search option.
 - SearchType=ByAddress: The Record Search section applies the Search by Address as the default search option.
 - SearchType=ByLicense: The Record Search section applies the Search by License as the default search option.
 - SearchType=ByPermit: The Record Search section applies the Search by Permit as the default search option.
 - SearchType=ByTradeName: The Record Search section applies the Search by Trade Name as the default search option.
 - SearchType=ByContact: The Record Search section applies the Search by Contact as the default search option.
- module=[Provide the module name]
- tabvisible=[Yes or No] Yes indicates the tab is visible at the top of the home page. No indicates there is no tab at the top of the home page.
- blockvisible=[Yes or No] Yes indicates you want the module features to be available in the block sections at the bottom of the welcome pages. No indicates you want to hide the block section for the module features.

[Table 65: Sample ACA_CONFIG_TABS Configuration](#) provides a few examples of ACA_CONFIG_TABS values and their effects.

Table 65: Sample ACA_CONFIG_TABS Configuration

| Standard Choice Value | Value Description | Page Associated with the Value |
|-----------------------|---|---|
| Building | label=aca_sys_default_module_name, order=1, role=0 1, url=/Cap/CapHome.aspx? ShowMyPermitList=Y& SearchType=None, module=Building, tabvisible=Yes | Enables the Building tab on both the Welcome Global and Welcome Registered Pages. When users click the tab, the building home page displays the My Permit List section and hides the General Search section. |
| Home | label=aca_sys_default_home, order=0, role=0 1, url=/Welcome.aspx, blockvisible=no | Enables the Home tab on both the Welcome Global and Welcome Registered Pages, and hides the Home block in the block sections at the bottom of the welcome pages. When users click the tab, the welcome page displays. |

ACA_CONNECT_LICENSE_AUTO_APPROVED

Product

Citizen Access

Type

System Switch

Description

This Standard Choice controls whether Civic Platform automatically approves a license when a public user associates the license with his account in Citizen Access. For example, if a public user associates a license with his account from the Account Management page in Citizen Access, the License tab of the Public User administration portal in Civic Platform displays the status of the associated license as “Approved”.

Standard Choice value is either Y or N. Y enables license auto-approval. N disables license auto-approval, so administrators need to manually approve the license through the License tab of the Public User administration portal.

ACA_EMAIL_TO_AND_FROM_SETTING

Obsolete.

ACA_EMAIL_REGISTRATION_TO

Product

Citizen Access

Type

System Switch

Description

This Standard Choice provides the ability to designate the “CC” email address on the registration confirmation emails which Civic Platform sends to users that register for an ACA account. Enter each email address in a Standard Choices Value field to include it in the “CC” line of the registration email, so that the email address can receive a copy.

**Note:**

Instead of configuring the Standard Choice, you can directly specify the To email addresses for the ACA_MESSAGE_SENDDPASSWORD template in the Notification Templates administration portlet. This Standard Choice setting overrides the settings in the notification template.

ACA_EMAIL_REGISTRATION_FROM

Product

Citizen Access

Type

System Switch

Description

This Standard Choice provides the ability to designate the "From" email address from which Civic Platform sends the registration confirmation email to users that register for an Citizen Access account.

Standard Choices value can only be one e-mail address. For example, support@cityofbridgeview.com.

**Note:**

Instead of configuring the Standard Choice, you can directly specify the From email addresses for the ACA_MESSAGE_SENDDPASSWORD template in the Notification Templates administration portlet. This Standard Choice setting overrides the settings in the notification template.

ACA_FILTER_CAP_BY_LICENSE

Product

Citizen Access

Type

System Switch

Description

This Standard Choice provides a way to incorporate filters so that the licensed professional avoids choosing inapplicable options online.

Table 66: ACA_FILTER_CAP_BY_LICENSE Standard Choice Values

| Standard Choice Values | Value Description | Description |
|---|---|---|
| ENABLE_FILTER_BY_REFTYPE_{Module} | YesNo | Yes enables filter record type by License type for module; No disables it. |
| FILTER_BY_REFTYPE_{Module}_{License type} | BUILDING/MECHANICAL PERMIT/RESIDENTIAL/ALL CATEGORIES,BUILDING/BUILDING PERMIT// | This value matches specific license types from a specific module with permit types. Use comma to separate the permit types. |
| EXCLUDE_FROM_FILTER_BY_REFTYPE_{Module} | BUILDING/BUILDING PERMIT/RESIDENTIAL/ALL CATEGORIES,BUILDING/Elevator Permit//, BUILDING/Well// | This value allows permit types to be excluded from license validation when the filter is enabled for the module. This means license professionals can apply for the permit types with or without a valid license. Use comma to separate the permit types. |

ACA_PAGE_PICKER

Product

Citizen Access

Type

System Switch

Description

This Standard Choice defines the pages in the page picker in Shopping Cart functionality, such as to continue shopping.

Standard Choices values may include:

{Enter a number to identify the available ACA page pickers.}

1

2

3

Value Desc:

{Enter the ACA page name and its URL. For example, name=go to Building Disclaimer page,url=/Cap/CapApplyDisclaimer.aspx?module=Building}

ACA_SECURITY_SETTING

Product

Citizen Access

Type

System Switch

Description

This Standard Choice controls whether Citizen Access validates the referer header in POST requests to prevent cross-site request forgery.

Table 67: ACA_SECURITY_SETTINGS Standard Choice Values

| Standard Choice Values | Value Description | Description |
|--------------------------|---|---|
| ENABLE_URL_REFERER_CHECK | YesNo | If the Value Description is No or undefined, Citizen Access does not validate the referer header in POST requests. If the Value Description is Yes, Citizen Access validates the referer header. |
| TRUSTED_SITES | Enter third-party trusted sites, separated by semicolons. | The Value Description lists all the trusted sites whose POST requests can pass the validation by Citizen Access. |



Note:

If you set ENABLE_URL_REFERER_CHECK to Yes, and the Citizen Access servers are load balanced, you must add all the servers as trusted sites as well: Add the key TrustedSites into the web.config file and add the server URLs (which can be either the IP URLs or domain URLs) in the key value. For example:

```
<add key="TrustedSites" value="http(s)://[ACA SITE URL1]/,http(s)://[ACA SITE URL 2]/"
```

After the change, click the Clear Cache button in ACA Admin, or restart the Citizen Access servers, to make all the settings take effect.

ACA_SPELL_CHECKER_ENABLED

Product

Citizen Access

Type

System Switch

Description

This Standard Choice controls the spell checker in Citizen Access. When the Standard Choice value is Yes, the spell checker is available for public users in Citizen Access. When the Standard Choice value is No, the spell checker is not available.

Standard Choices values may include:

Yes

No

ADHOC_REPORT_DB_VIEW

Product

Civic Platform

Type

System Switch

Description

Use this Standard Choice to control which DB views (data sources) are available in the Report Manager Ad hoc Report Data Sources list for agencies to use in assigning permissions to data sources for Ad hoc Reporting. All agencies have the same DB views in common. This Standard Choice provides each agency with the ability to define available DB views for ad hoc reporting. After the view appears on the Ad Hoc Report Data Sources list, agencies can set permissions to define who can access the data for ad hoc reporting.

If you do not set up this Standard Choice, Civic Platform uses default DB Views.

Standard Choice values can include one or more names DB View from the Accela-hosted database. A list of the DB_VIEWS available for this Standard Choice is available below:

V_ADDRESS

V_CASHIER_SESSION

V_CFG_WORKFLOW

V_COMMENT_RECORD

V_CONDITION_RECORD

V_CONTACT

V_FEE

V_FEE_PAYMENT_HISTORY

V_GUIDESHEET

V_HEARING

V_INSPECTION

V_INSPECTION_1ST_LAST

V_OWNER

V_PARCEL

V_PAYMENT
 V_PROFESSIONAL
 V_RECORD
 V_RECORD_DATES_STAFF
 V_RECORD_LICENSE
 V_REF_CONTACT
 V_REF_PROFESSIONAL
 V_RELATED_RECORD
 V_SET
 V_STANDARD_CHOICE
 V_STANDARD_CONDITION
 V_STATUS_HISTORY
 V_TIME_ACCOUNTING
 V_TRUST_ACCT
 V_TRUST_ACCT_ASSOCIATED
 V_TRUST_ACCT_TRANSACTION
 V_USER
 V_USER_GROUP_FID
 V_USER_N_GROUP
 V_WORKFLOW
 V_WORKFLOW_HISTORY

ADDRESS_TYPE

Product

Civic Platform

Type

System Switch

Description

Specify the type of address to appear in the Address Types field when users are completing the address portion of an application.

Standard Choice values can include:

Court

Incident

ADDRESSET_SCRIPT_LIST

Product

Civic Platform

Type

System Switch

Description

This Standard Choice allows you to execute EMSE scripts on an address set.

Standard Choice values can include:

{EMSE Script Name}

Value Desc:

{Enter the name to display in the drop-down list for this script.}

AGENCY_EMAIL_REGISTRATION_TO

Product

Citizen Access

Type

System Switch

Description

This Standard Choice sends the registration activation e-mails to a specific e-mail address of an agency employee for managing the activation of public user accounts internally. Administrators must set PA_EMAIL_VERIFICATION in the Standard Choice [ACA_CONFIGS](#) to *No* so that the public user does not get the registration e-mail.

Standard Choices value can be:

{An agency e-mail address. For example, John.Smith@bridgeview.com.}



Note:

Pay attention to the difference between this Standard Choice and [ACA_AGENCY_EMAIL_REGISTRATION_TO](#).

ALLOW_NEGATIVE_FEE_TRANSFER_AS_CREDIT

Product

Civic Platform

Type

System Switch

Description

Use this Standard Choice to allow processing set payments when the total amount of an invoiced fee item is negative.

Table 68: ALLOW_NEGATIVE_FEE_TRANSFER_AS_CREDIT Standard Choice Values

| Standard Choice Values | Value Description | Description |
|------------------------|-------------------|--|
| Yes | - | Civic Platform handles processing (delete) of negative fees on a set, calculating according to all the applications in the set regardless of a positive or negative amount on an application. Allows transfer of a negative fee as credit from an application to pay for another application in the set. |
| No | - | Civic Platform calculates according to only the applications in the set that have a positive amount. |

ALLOW_PAYMENT_OF_FUTURE_FEES

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls the Apply to Future Invoice check box which allows you to transfer any unchecked payments on the Generate Receipt page to a future invoice. This function applies to cash payments only. To display the check box on the Generate Receipt page of the Payment tab, enable the Standard Choice and set the Standard Choice value to Yes.

Standard Choice values include:

Yes

No

ALLOW_SHARED_DROPDOWN_LIST

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines whether administrators can bind a shared drop-down list for an application-specific information (ASI) or task-specific information (TSI) field in the ASI or TSI definition page.

Standard Choice values include:

Yes

No

ALLOW_STANDARD_DUPLICATE_FILENAME

Product

Civic Platform

Type

System Switch

Description

This standard choice allows a client to turn off the duplicate name validation for external EDMS file uploading. If this standard choice is not configured, duplicate filenames of uploaded files are not permitted.

Standard choice values include:

Yes (allow duplicate filenames).

No (do not allow duplicate filenames). This is the default value.

APO_ATTACHMENT_SELECTION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines user notification when APO objects are attached to a record. The two options indicate whether all APO objects attach without a message to the user or if Civic Platform provides a selection page message.

Standard Choice values include:

All

User Selection

APO_CHECK_DUPLICATE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice applies to multi-agency administration and provides a way to check for duplicate information in a shared database between agencies.

Standard Choice values include:

Yes

No

APO_SUBDIVISIONS

Product

Civic Platform, Citizen Access

Type

System Switch

Description

If you activate FIDs [0241-Parcel Subdivision and Lot Search](#) and [8327-Search Select Parcel Function](#), you can define the subdivisions that display as choices in a drop-down list of the Subdivision field. Each subdivision name can be a maximum of 2000 characters and cannot contain double quotation marks.

The Standard Choices values are subdivision names. For example, you could define a subdivision named Westwood.

If you do not define subdivisions, a text field displays instead of a drop-down list.

APO_SUBDIVISIONS_LOTS_[subdivision name]

Product

Civic Platform

Type

System Switch

Description

If you activated FIDs [0241-Parcel Subdivision and Lot Search](#) and [8327-Search Select Parcel Function](#), and defined subdivisions in the `APO_SUBDIVISIONS` Standard Choice, you can choose to define the subdivision lots that display as choices in a drop-down list during a parcel search. Use the same value for the subdivision name in the item name as you use for the Standard Choices value in `APO_SUBDIVISIONS`.

For example, if you define an `APO_SUBDIVISIONS` Standard Choice value of Westwood (the name of a subdivision), You could identify lots 1 through 25 in the Standard Choice `APO_SUBDIVISIONS_LOTS_WESTWOOD`. Each lot name must be less than 40 characters and cannot contain double quotation marks. If you do not define lots, a text field displays instead of a drop-down list.

APOSE_SYNCHRONIZE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines how Civic Platform synchronizes associated reference data in new record intake forms or on the tabs in the record detail portlet. Types of associated reference data can be: Address, Parcel, Owner, Structure, and Establishment. When you add or delete some reference information in a record, Civic Platform automatically adds associated reference data of the reference information, prompts the user to add or delete it, or the user must manually complete each reference data section.

Standard Choice values are:

Address

Parcel

Owner

Structure

Establishment

Value Desc options are:

Auto. The associated reference data automatically populate a record.

Prompt. A message window pops up displaying the associated reference data. The user can populate the record with information from the associated reference data, look up another reference record, or enter new information.

Manual. The associated reference data does not automatically populate in the record. You must complete the associated reference data manually,

For example, a reference parcel is added to the Parcel section of a record. One address, two owners, and one structure are associated with the parcel.

- If the Address value for APOSE_SYNCHRONIZE is set to Auto, then the associated address information automatically populates the record.
- If the Owner value is set to Prompt, a prompt window pops up displaying the information for the two associated owners. The user can choose to populate the record with one or both of the associated owners' information.
- If the Structure value is set to Manual, the user must complete the Structures section manually, by searching for an existing structure and adding its information to the record. The associated reference data does not automatically populate in the record.

APPLICATION SPEC INFO UNIT

Product

Civic Platform

Type

System Switch

Description

When you configure an application-specific information (ASI) field or a task-specific information (TSI) field, this Standard Choice provides the drop-down list options for the Unit property of the field. The unit property is used in the calculation of fees.

Standard Choice values can include:

Acres

Copies

Days

Each

Feet

Hectare

Hours

Lbs

Linear Fee

Lots

Meter Sq

Months

Psi

Sq.ft.

Sqft

Total

Years

fpm

ft

APPLICATION_STATUS_REASON

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls the reasons a user can choose from when changing record status.

Standard Choice values can include:

Unpaid Fees

Building Requirements not Met

Pending Additional

Document Submission

Other Values

APPLICATION_TYPE_SECURITY_FID

Product

Civic Platform

Type

System Switch

Description

Use this Standard Choice to control access to an application based on its status. Enter each workflow, or process, by FID.

For example, you can limit access to a building permit application if the status is Plan Review by restricting users ability to schedule inspections or result inspections, and allowing them to only view the application.

When the application status changes to Issued, users can schedule an inspection and result an inspection.

Table 69: APPLICATION_TYPE_SECURITY_FID Standard Choice Values

| Standard Choice Values | Value Description |
|------------------------|--|
| 8119 | GIS |
| 0179 | Admin Application Specific Info Subgroups |
| 8033 | Additional Information |
| 8028 | Addresses |
| 8110 | Application Comment |
| 8154 | Application Hierarchy - Check Application Type Security at selection time. |
| 8073 | Application Specific Information |
| 8270 | Application Specific Info Table |
| 8141 | Application Status |
| 8142 | Application Status History |
| 8104 | Assess Fees |
| 8108 | Cashier Payment |
| 8020 | Condition Full Privileges |
| 8031 | Contacts |
| 8153 | Document Upload |
| 8271 | Fees Recalculate Fees |
| 8145 | Inspection Results |

| Standard Choice Values | Value Description |
|------------------------|---|
| 8143 | Inspection Scheduling |
| 8032 | Licensed Professionals |
| 8030 | Owners |
| 8029 | Parcels |
| 8103 | Structure Tracking |
| 8051 | Subtask Guide Sheet |
| 0245 | Time Tracking |
| 8038 | Valuation Calculation |
| 8323 | Update Related CAPs |
| 8132 | Workflow, Workflow History, Workflow Ad hoc |

Standard Choices Item - Edit

Use this form to set up a Standard Choices Item.

Standard Choices Item Name: APPLICATION_TYPE_SECURITY_FID

Description: (250 char max)

Status: Enable Disable

| Standard Choices Value | Value Desc |
|------------------------|------------------------|
| 0043 | Tickler |
| 8028 | Addresses |
| 8029 | Parcels |
| 8030 | Owners |
| 8033 | Additional Information |
| 8106 | Void Application |
| 8112 | Application Cloning |

Figure 7: Typical Values for APPLICATION_TYPE_SECURITY_FID

Also if your agency has a Workflow Supervisor (FID [8090-Workflow Supervisor](#) enabled), see the Standard Choice [WORKFLOW_FIDS](#).

APPLY_SYSTEM_DEFAULT_FORMAT

Product

Civic Platform

Type

System Switch

Description

With this Standard Choice, you can specify the receipt templates that must apply the system default alignment style, even though administrators define the alignment differently in the templates.

The following describes the system default alignment style:

- Except the description (Total Invoice Amount:, Total Payment:, and Balance:) of the variables (\$totalInvoiceAmount\$, \$totalPayment\$ and \$balance\$), left-aligns the fee item descriptions and left-aligns the descriptions of the other variables (including date, Operator id, Permit Id etc.).
- Right-aligns the fee amounts.

Standard Choice values can include:

RECEIPT_SUMMARY

SET_CHECK_ENDORSEMENT

SET_RECEIPT_SUMMARY

TRANSACTION_CHECK_ENDORSEMENT

TRANSACTION_RECEIPT_SUMMARY

TRUSTACCOUNT_CHECK_ENDORSEMENT

TRUSTACCOUNT_RECEIPT_SUMMARY

For receipt templates you do not add as a Standard Choice value, Civic Platform prints receipts that follow the alignment and content design in the template. For receipt templates you add as a Standard Choice value, Civic Platform prints receipts that follow the system default alignment style, and the content design in the templates.

ASI_ALIGNMENT_OPTIONS

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice allows administrators to set application-specific information (ASI) fields to either left- or right-justification. Agencies whose primary language is Arabic can configure their system to allow data in ASI fields to be entered and displayed from right-to-left (in right-justification).

Standard Choice values include:

Left Align

Right Align

ASI_CONFIGS

Product

Civic Platform, Citizen Access

Type

System Switch

Description

The Standard Choice controls application-specific information functionality with various Standard Choices values.

Table 70: ASI_CONFIGS Standard Choice Values

| Standard Choice Value | Value Description | Description |
|---------------------------------|-------------------|--|
| DISABLE_POP_UP_FOR_APPLY_CHANGE | YesNo | <p>This value controls the ability to disable the pop-up window functionality when users change ASI or ASIT group information in a record type.</p> <p>Yes disables pop-up windows, and No displays pop-up window functionality.</p> |
| NEW_ASI_DEFAULT | YesNo (default) | <p>This value controls whether a new application-specific information (ASI) field and ASI table displays on existing records independent of status.</p> <p>Yes: A field displays in various areas in ASI configuration where an administrator can indicate if ASI and ASI table information displays on existing records.</p> <p>No (default): Civic Platform hides the field and only displays the new ASI field or ASI table on new records.</p> |
| SYNC_CHANGE_TO_DAILY | YesNo (default) | <p>This value controls the ASI structure configuration.</p> <p>Yes: The ASI daily structure is controlled by reference data.</p> <p>No (default): The ASI structure maintains the integrity of the daily structure. For example, if a contact type has no template and then administrators assign a template to it, this value defines whether the existing contacts of the contact type apply the template or not.</p> |

ASI_EDIT_CONTROL_SYSTEM_LEVEL

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls who can edit application-specific information you create. Non-supervisor users can enter or change the application-specific information during application creation. You can designate individual fields to allow only supervisors to update the data elements after a user saves the application. The supervisor edit-only designation can also apply to individual subgroup fields in application-specific information tables.

Standard Choice values can include:

Yes

No

ASSET_CALENDAR_BUILD_INDEX_DURATION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the start date and end date of a duration. When you run a batch job whose type is Asset Calendar Rebuild Index, the batch job only builds indexes for the asset events whose event time (for example, event schedule time) falls in the duration.

Table 71: ASSET_CALENDAR_BUILD_INDEX_DURATION Standard Choice Values

| Standard Choice Values | Value Description | Description |
|------------------------|--|---|
| END DATE | Enter a date with this format: MM/dd/yyyy. For example: 01/23/201301/01/2014 | Enter the end date and end date of the duration. If you do not specify the end date, the end date defaults to the latest event date. |
| START DATE | Enter a date with this format: MM/dd/yyyy. For example: 06/23/201312/01/2012 | Enter the start date of the duration. If you do not specify the start date, the start date defaults to the earliest event date. |

ASSET_GROUP

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the asset groups that populate the Asset Group fields.

Standard Choice values can include:

Fleet

Parks and Recreation

Street

Wastewater - Sewer

Water

ASSET_TREE_NODE_CONFIG

Product

Civic Platform, Mobile Office

Type

System Switch

Description

This Standard Choice customizes the tree view on the Linked Assets tab.

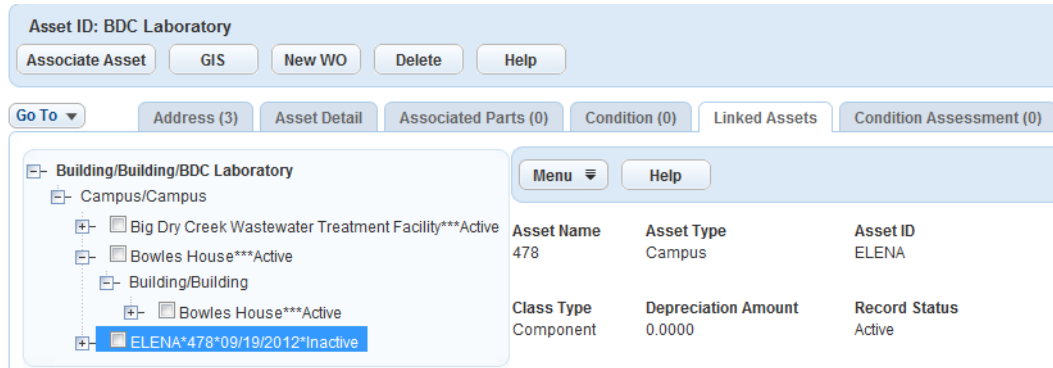


Figure 8: Customized Linked Assets Tree in Civic Platform

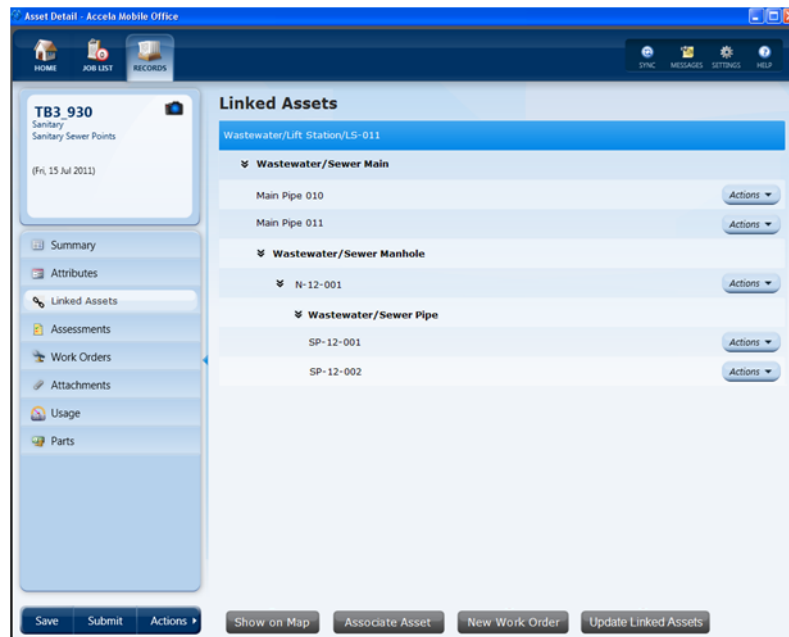


Figure 9: Customized Linked Assets Tree in Mobile Office

Table 72: ASSET_TREE_NODE_CONFIG Standard Choice Values

| Standard Choice Value | Value Description | Description |
|-----------------------|---|---|
| MASK | Enter one or more of the following parameters, separated with special characters such as slashes "/" or stars "***". \$ASSET_ID\$ \$ASSET_NAME\$ \$DATE_OF_SERVICE\$ \$STATUS\$ For example, \$ASSET_ID\$*\$ASSET_NAME\$*\$DATE_OF_SERVICE\$*\$STATUS\$ | The value defines the information that a child asset node displays in the tree view on the Linked Assets tab. In the Value Description, each parameter specifies the information that displays at each child asset node, such as asset ID, asset name, date of service, and then status. See Figure 8: Customized Linked Assets Tree in Civic Platform and Figure 9: Customized Linked Assets Tree in Mobile Office as illustrative examples. |
| MAX_LENGTH | Enter a number | The value specifies the maximum length of a child asset node in the tree view on the Linked Assets tab. |

| Standard Choice Value | Value Description | Description |
|-----------------------|-------------------|---|
| | | For example, if the value description is 100, then a child asset node can display up to 100 characters. |

ASSET_SIZE_UNIT

Product

Civic Platform, Mobile Office

Type

System Switch

Description

This Standard Choice defines the unit of asset size and the unit of work order start location and end location on linear assets.

Standard Choice values can include:

Inches

Feet

Yards

Miles

NauticalMiles

Millimeters

Centimeters

Meters

Kilometers

Decimeters

ASSET_USAGE_UNIT_TYPE

Product

Civic Platform, Mobile Office

Type

System Switch

Description

This Standard Choice allows administrators to create asset usage types. When you define these types, agency administrators can associate multiple unit types with a specific asset type. This allows daily agency users to specify the unit types from a drop-down list, applying them to specific asset types in both the Asset management portlets and the Preventative Maintenance Schedule portlets. This functionality accompanies the setting of Function Identification [0326-Define Asset Usage Unit Type](#).

Standard Choice values can include:

Quarts

Gallons

Miles

Hours

AUDITSET_INSPECTION_SCRIPT_LIST

Product

Civic Platform

Type

System Switch

Description

This Standard Choice populates the Execute Script drop-down menu in the Random Audit portlet for inspection audit sets. The drop-down menu contains names of EMSE scripts that users can run on the inspection audit set. If you do not define this Standard Choice, then the Execute Script button cannot show in the Random Audit portlet for inspection audit sets.

Standard Choice values can include:

{Any EMSE script name}

Value Desc:

{Enter the script name you want to display in the drop-down menu.}

AUDITSET_SCRIPT_LIST

Product

Civic Platform

Type

System Switch

Description

This Standard Choice populates the Execute Script drop-down menu in the Random Audit portlet for record audit sets. The drop-down menu contains names of EMSE scripts that users can run on the record audit set. If you do not define this Standard Choice, then the Execute Script button cannot show in the Random Audit portlet for record audit sets.

Standard Choice values can include:

{Any EMSE script name}

Value Desc:

{Enter the script name you want to display in the drop-down menu.}

AUTHORIZED_SERVICE

Product

Citizen Access

Type

System Switch

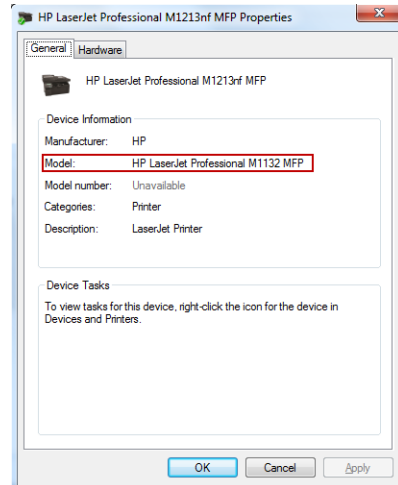
Description

This Standard Choice defines the authorized service types that the agency can support, and the printers that authorized agents or authorized agent clerks can use to print license tags in authorized service.

Currently, Citizen Access only supports fishing and hunting license sales.

Table 73: AUTHORIZED_SERVICE Standard Choice Values

| Value | Value Description | Description |
|-----------------------------------|---|--|
| FISHING_AND_HUNTING_LICENSE_SALES | Enter the service name you want to display for the service type. | The service name is "Fishing and Hunting License Sales" by default. You can enter a new name to replace the default one. |
| Printers | Enter the model name of the barcode printer for license tag printing. | You can right click the printer icon you are using, select Properties, and then get the model name of the printer in the pop-up Properties window. |



It is recommended to use Datamax-O'Neil E-Class Mark III Printer models for printing quality license tags.

AUTO_GENERATE_RECEIPT

Product

Civic Platform

Type

System Switch

Description

You can use this Standard Choice to streamline the payment process by automatically generating a receipt whenever a cashier intakes a payment transaction.

Standard Choice values include:

Yes. Civic Platform skips the Generate Receipt page on the Payment tab and automatically generates the Receipt and Receipt Summary detailing all of the payment transactions.

No. Civic Platform displays the Generate Receipt page with all payment transactions marked. The cashier must manually choose which payments to exclude from the receipt.

AUTO_INVOICE_MODULE

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice determines whether Civic Platform automatically generates an invoice when you assess one or more fee items that belong to a module.

Standard Choice values can include:

{Enter a module name.}

Building

Licenses

AUTO_OPEN_CASH_DRAWER

Product

Civic Platform

Type

System Switch

Description

With this Standard Choice, you can specify the payment methods with which the cash drawer opens when users handle a payment. If the Standard Choice is undefined, the cash drawer opens for every payment, regardless of the payment method.

Standard Choice values can include:

ATM, Billed, Cash, Check, Coupon, Credit Card, Debit Card, Internal Transfer, Journal Entry, LockBox, Misc Credit, Money Order, Multiple Tenders, Other, Trust Account, Waiver, Write Off.

AUTO_PAY_TRUST_ACCOUNTS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines the default values for the fields available for creating trust accounts. The description of each value is the value your agency wants automatically filled when someone creates a new account. You must create account IDs with a unique identifier, and automatically add the person that you create the trust account for to the Associated People list for the trust account.

Standard Choice values can include:

Account ID (required)

Overdraft Limit (required)

Overdraft Yes/No (required)

Description

Ledger Account

Associated People secondary tab

AUTO_SYNC_PEOPLE

Product

Civic Platform, Citizen Access, and Mobile Office

Type

System Switch

Description

This Standard Choice specifies whether to link or copy a reference contact or licensed professional when users add the reference contact or licensed professional to a new or existing record.

You must define the Standard Choice values in the Standard Choices portlet in the Setup Admin ([Editing Standard Choices in the Setup Admin](#)).

Standard Choices: AUTO_SYNC_PEOPLE

Standard Choices Item Name: AUTO_SYNC_PEOPLE

Description: (250 char max) Enable or disable the contact or professional change in transactions to be reflected in Reference, and vice versa.

Status: Enable Disable

Type: System Switch Shared drop-down EMSE Business Configuration

| Module Name * | Sync Contact | Sync Professional | Active |
|---------------|-------------------------------------|--------------------------|-------------------------------------|
| AMS | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Building | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| ... | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| ... | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

Table 74: AOTP_SYNC_PEOPLE Standard Choice Values

| Value | Description |
|--------------|--|
| Module Name | Displays the modules in the agency. This Standard Choice setting applies at the module level. |
| Sync Contact | <p>When selected, links a contact with its reference source when the contact associates with a record.</p> <p>When you link a record contact with its reference source, the following information synchronize between the contacts:</p> <ul style="list-style-type: none"> Standard contact fields except Contact Type and Status. Common template contact fields between the contact and its reference source. Usually, contact types for transaction include role-specific template fields, but contact types for reference do not include these fields. Contact addresses. |
| Active | When selected, includes this item on the list of Standard Choices. |

BATCH_INVOICE_REPORT

Product

Civic Platform

Type

System Switch

Description

If you want to generate a batch invoice report, you can define the report name in this Standard Choice.

Standard Choice values include:

{Specify the report name.}

BATCH_JOB_PM_ADVANCE_PERIOD

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls the period options for the PM Generate field on the schedule form of PM Schedule batch jobs. This allows you to select an amount of time, in advance of a PM Schedule, to run a batch job.

Standard Choice values include:

Days

Months

Weeks

Years

BATCH_JOB_RESULT

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls the values that populate the batch job result status in the Batch Engine log.

Standard Choice values are:

Completed. This value displays in the batch job log for a batch job that ran successfully.

Timed Out. This value displays in the batch job log for a batch job that failed to run because it was taking too long.

Terminated. This value displays in the batch job log for a batch job that was manually stopped.

BATCH_JOB_SCHEDULE_FREQUENCY

Product

Civic Platform

Type

System Switch

Description

This Standard Choice sets values for the frequency of batch jobs.

Standard Choice values include:

Once. Enable this value to allow creation of batch jobs that run only once.

Daily. Enable this value to allow creation of batch jobs that run every day.

Weekly. Enable this value to allow creation of batch jobs that run once per week.

Monthly. Enable this value to allow creation of batch jobs that run once per month.

Yearly. Enable this value to allow creation of batch jobs that run one time per year.



Note:

For the batch job that builds the index server for global search, the Standard Choice values only include “Once” and “Monthly”. That means if you set any values other than “Once” or “Monthly” (for example, “Daily”, “Weekly”, and “Yearly”), these values will not appear in the drop-down list of the Job Schedule portal.

BATCH_JOB_SCHEDULE_TYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice allows you to determine whether users can run a defined batch job by setting its status to Active or On Hold.

Standard Choice values include:

Active. Specifies a batch job to run at its scheduled time.

On Hold. Specifies a batch job not scheduled to run.

BATCH_JOB_SERVER

Product

Civic Platform

Type

System Switch

Description

This Standard Choice enables you to specify a particular business server on which to run a batch job. The value you enter for this Standard Choice populates the Job Server drop-down list in the Batch Job portlet. This option can be critical for running extremely large jobs such as bulk document processing for an agency that serves a large population center.

Standard Choice values:

{The server options (IP ports) for the Job Server drop-down field (Batch Job Edit/New page).}

BATCH_JOB_SERVICE_CATEGORY

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice determines the types of service categories from which you can select when you create a batch job. A batch job service category helps you classify batch job types.

The values you enter for this Standard Choice populate the Service Category drop-down list in Batch Job detail portlet.

Standard Choice value examples:

Asset Calendar Rebuild Index. Allows users to create a batch job for syncing the index server with the asset events that occur in a given duration.

Asset/GIS Sync. Allows users to create a batch job that synchronizes information between Accela Asset Management and GIS.

Geotagging Existing Record. Allows users to create a batch job which adds the geometry information from your agency's GIS system to the Civic Platform objects that already exist in the Civic Platform database. These objects include geocoded addresses and GIS features.

Global Search Rebuild Index. Use this value to define the batch job engine as the process for syncing the index server with the database. Enable this value to run a sync between the application server and the index server. Civic Platform uses the index server for the global search feature. Running this sync ensures the global search returns the most current information in Civic Platform.

Optimize Inspection Route. Allow users to create a batch job that generates the sequence of inspection route sheet items for each inspector, based on the start location, end location, and the default route type in the inspector's user profile.

PM Schedule. Allows users to create a batch job that generates work orders in advance of preventative maintenance schedules.

Proxy User Process. Allows users to create a batch job that sets the delegate invitations to expired or purges the expired or declined delegate invitations from database at the time interval.

Recurring Related Inspection. Specifies Recurring Related Inspection as a batch job service category.

Send Hearing Notice Email

Send License Expired Email. Allows users to create a batch job which collects all expired licenses in the software and sends email notifications to the associated licensed professional.

BATCH_JOB_STATUS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls the indicator of the current, real-time status of a batch job.

Standard Choice values include:

Complete. Indicates a batch job that has run successfully.

Running. Indicates a batch job that is currently running.

In Process Queue. Indicates a triggered batch job that is waiting to run.

Terminated. Indicates a terminated batch job, because of an error or system time-out.

BATCH_JOB_TYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice indicates the types of batch job available.

Standard Choice values include:

System. Civic Platform supports the System type of batch job.

URL. Civic Platform supports the URL type of batch job.

Report. Civic Platform supports the Report type of batch job.

Script. Civic Platform supports the Script type of batch job.

BUDGET_ACCOUNT

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines budget accounts and budget numbers that users can associate with parts for costs tracking in part transactions. Each budget account must have a unique budget number.

Standard Choice values can include:

{Enter a budget account name}.

Value Desc:

{Enter the budget account number corresponding to the budget account.}

CALENDAR_BLOCK_SIZE

Product

Civic Platform

Type

System Switch

Description

This Standard Choices CALENDAR_BLOCK_SIZE and [CALENDAR_BLOCK_UNIT](#) jointly determine the time length for the default calendar time block.

When you set up a calendar, you set the default time block for each calendar unit. A unit comprises a basic time value Civic Platform uses to measure the duration of a calendar event, such as a staff meeting, inspection, or hearing.

Civic Platform measures calendar units as multiples of the default calendar time block. For example, if you set the default calendar time block at 30 minutes, then one unit equals 30 minutes and two units equal one hour.

Standard Choice values can include:

15
30
45
60

CALENDAR_BLOCK_UNIT

Product

Civic Platform

Type

System Switch

Description

The Standard Choices [CALENDAR_BLOCK_SIZE](#) and this Standard Choice `CALENDAR_BLOCK_UNIT` jointly determine the time length for the default calendar time block.

When you set up a calendar, you set the default time block for each calendar unit. A unit comprises a basic time value Civic Platform uses to measure the duration of a calendar event, such as a staff meeting, inspection, or hearing.

Civic Platform measures calendar units as multiples of the default calendar time block. For example, if you set the default calendar time block at 30 minutes, then one unit equals 30 minutes and two units equal one hour.

This Standard Choice defines the Block Unit type for the Unit Type field drop-down list on the Inspection Calendar detail page.

Standard Choice values can include:

Minute
Hour
Day

CALENDAR_SETTING

Product

Citizen Access, IVR, Accela Wireless, and EMSE

Type

System Switch

Description

This Standard Choice determines which calendars the Auto Assign and the Get Next Working Date functionality uses in Citizen Access, IVR, Accela Wireless, and EMSE.

Table 75: CALENDAR_SETTING Standard Choice Values

| Value | Value Description | Description |
|---------|-------------------|---|
| VERSION | CLASSIC | The Auto Assign and the Get Next Working Date functionality uses the calendars, including inspection blockout and inspector calendars, from Civic Platform Classic. |
| | V360 | The Auto Assign and the Get Next Working Date functionality uses the calendars, including inspection calendars and user calendars, from Civic Platform Vantage360. |

CAP_CHILD_DOCUMENT

Product

Civic Platform

Type

System Switch

Description

This Standard Choice allows you to associate the related or renewal document of a child record to the parent record.

| Description | Size | Type | Entity Type | Inspection | Modified Date | Record Type Alias | Alternate ID |
|-----------------|----------|--------------|------------------------|------------|---------------|-------------------|--------------|
| document | 1.8 KB | applicati... | Record | | 09/20/2009 | | |
| sted record doc | 30.02 KB | text/plain | Related Record | | 09/20/2009 | Jenny | 09SGN-0003 |
| tial renewal... | 1.41 MB | applicati... | Partial Renewal Record | | 09/22/2009 | Building/... | 09TMP-0003 |

Standard Choices values are:

Related

Renewal

CAP_CREATE_SETTINGS

Product

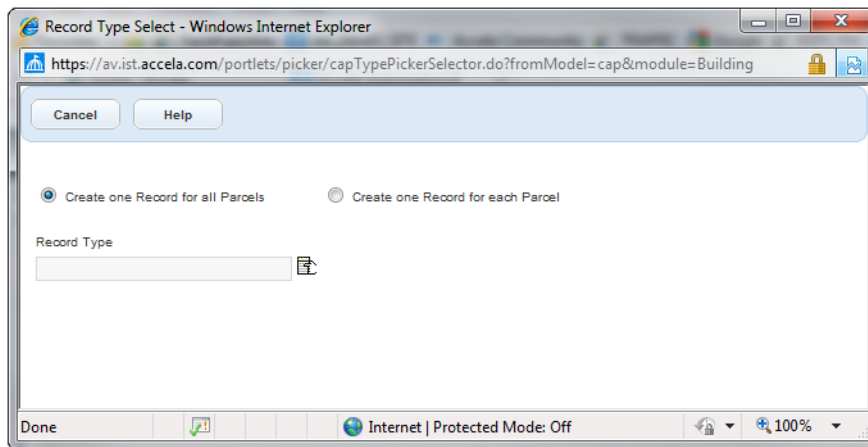
Civic Platform

Type

System Switch

Description

This Standard Choice sets the default option in the Record Type Select portlet when users create a record.



If you define this Standard Choice, the default is “Create one Record for each Parcel”. Otherwise, the default is ‘Create one Record for all Parcels’.

Standard Choice value:

For Each Parcel

CAP_DETAIL_ICON_FILE_FORMATS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice enables the icon image on a record type, and thus the image in the records of the record type. The Standard Choices values define which file types Civic Platform accepts for display images.

When you associate a display image with an application type, the display image appears next to the Application Type Icon field label on the Application Type page. When you associate a display image with a record, the display image appears in the Record Detail page.

Standard Choice values can include:

.jpg
 .jpeg
 .icon
 .gif
 .bmp



Note:

If your agency uses Silverlight, Civic Platform does not support .gif images in those areas of the product, such as the administrator framework for data manager and record type management.

CAP_RETAIN_FEESCHEDULE

Product

Civic Platform

Type

System Switch

Description

To have existing applications retain their original fee schedule even after you change the application type, enable this Standard Choice and enter a value of Yes. To have existing applications adopt the modified fee schedule when you modify the application type, enable this Standard Choice and enter a value of No.

Standard Choice values can include:

Yes

No

CAPSET_SCRIPT_LIST

Product

Civic Platform

Type

System Switch

Description

This Standard Choice allows you to execute EMSE scripts on a record set. Enter the EMSE script name as the Standard Choices value. Then, in the Value Desc field, enter the name to display in the drop-down list for this script.

Standard Choice values can include:

{EMSE Script Name}

CASH_DRAWER_STARTING_ENDING_BALANCE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines whether Civic Platform requires users to enter the money amount of the cash drawer when starting or ending a cashier session.

Standard Choice values can include:

Yes. When a user starts taking payments by clicking the New Session button, a prompt displays requiring them to enter the starting cash amount in the drawer. Civic Platform also prompts them for an amount in the drawer when they finish a cashier session. These amounts display on the transaction list to assist users when they figure out the balance for the day. Civic Platform includes the starting and ending balances in the Cashier Session Report.

No. Users do not enter the balances when starting or ending a cashier session.

CASHIER_STATION

Product

Civic Platform

Type

System Switch

Description

With this Standard Choice, you can uniquely identify, by an ID, any cash drawer receiving payment. Mapping the computer name to the workstation name allows each client computer to find its cash drawer ID in the Standard Choice. You can then use the cash drawer ID in payment transactions and associate it with the payment.

The mapping is one-to-one between the Standard Choice value and the Value Desc. Use only unique name and unique number for each name and ID.

Standard Choice values can include:

{computer_name}. The computer name (mask key CDI). This value must exactly match the workstation name given to the computer that records the receipt of payments. For example, if the computer name is Cashier Station 3, enter Cashier Station 3 as the Standard Choice value. You may need to contact your agency IT administrator to find the name of the computer.

Value Desc:

{The cash drawer ID (mask key CDI), 8 characters at maximum.}

CENSUS_BUREAU_CONSTRUCTION_TYPE_CODE

Product

Civic Platform, Citizen Access, and Mobile Office

Type

System Switch

Description

This Standard Choice defines a drop-down list of values for the Census Bureau Construction Type field. If you do not define this Standard Choice, then the Census Bureau Construction Type field uses a drop-down list of hard-coded values.

The Construction Type field appears in various locations such as:

- The Addtl Info tab for a record in Civic Platform
- The Additional Information tab for a record in Mobile Office
- The Record Information tab for an inspection in Mobile Office

Standard Choices value can include:

{The code or value for the construction type.}

Value Desc:

{The description for the construction type.}

CLONE_REFERENCE_CONDITION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice decides whether to save or update the address, parcel, owner, or licensed professional condition when users override or unlock the conditions on a record.

Standard Choice values can include:

Yes. Civic Platform saves the Address, Parcel, Owner, or Licensed Professional condition as a local copy to a Record when the user overrides or unlocks the APO/Professional Condition on the Record.

No (or any other value). Civic Platform updates the APO/professional condition when the user overrides or unlocks the APO/Professional condition on the Record.

COMMUNICATION_SMS_PROVIDERS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice includes the values available for agency users to choose from in Communication Manager configuration settings.

Standard Choice values can include:

{Your SMS provider name and a description.}

COMPLAINT REFERRED SOURCE

Product

Civic Platform, Mobile Office

Type

System Switch

Description

This Standard Choice is specific to the Code Enforcement module. Activate this Standard Choice to display a drop-down list of values for the Referred Source.

Standard Choice values can include:

Neighbor

Public Official

Email

COMPLAINT REFERRED TYPE

Product

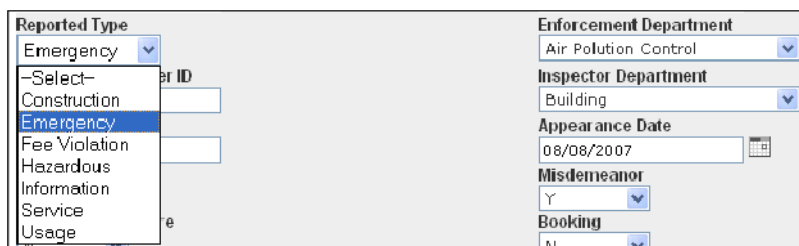
Civic Platform, Mobile Office

Type

System Switch

Description

This Standard Choice is specific to the Code Enforcement module. Activate this it to display a drop-down list of values in the Reported Type field.



Standard Choice values can include:

- Construction
- Emergency
- Fee Violation
- Hazardous
- Information
- Service
- Usage

CONDITION_PRIORITIES

Product

Civic Platform, Citizen Access and Mobile Office.

Type

System Switch

Description

This Standard Choice defines the priorities for conditions including conditions of approval and general conditions. The value descriptions describe options in the Priority field while the Standard Choice values specify the priority sequence for conditions.

Standard Choice values can include:

{A numeric value indicating the sequence of a priority}

1

2

3

Value Desc:

{Enter the label of the priority that is mapped to each Standard Choice value. In the following example, "High" maps to 1, "Medium" maps to 2, and "Low" maps to 3.}

High

Medium

Low

CONDITION TYPE

Product

Civic Platform, Citizen Access and Mobile Office.

Type

System Switch

Description

This Standard Choice defines the values displayed in the drop-down list of values for the condition type.

When you define a condition type, pay attention to the Condition Type Security feature, where you associate a condition type to an agency or user group. If the current user does not belong to the agency or the user group to which you associate the condition type, the current user cannot create a condition of this condition type.

Standard Choice values can include:

Bad Check

License Renewal

License Expired

CONDITIONS_OF_APPROVALS

Product

Civic Platform, Citizen Access, and Mobile Office

Type

System Switch

Description

This Standard Choice provides enhanced configuration for conditions and extends condition functionality to inspections and reference conditions. To manage standard conditions and condition statuses in the Conditions Maintenance portlet of Civic Platform, set the Standard Choice value to Yes. Otherwise, set the value to No.

Besides, this Standard Choice determines the availability of the Conditions of Approval feature in Civic Platform, Citizen Access, and Mobile Office. If you set the Standard Choice value to Yes:

- Civic Platform displays the Conditions of Approval tab for a record, an inspection, and a record set.
- Citizen Access allows administrators to configure the Conditions of Approval section and displays the Conditions of Approval section to public users.
- Mobile Offices displays the Conditions of Approval tab for a record and its related inspection.

Standard Choice values can include:

Yes

No

CONTACT_ACROSS_AGENCIES

Product

Civic Platform, Citizen Access, and Mobile Office

Type

System Switch

Description

Civic Platform uses this Standard Choice for multiple-agency administration. This Standard Choice determines which agencies can share contacts, including basic contact information, contact templates,

contact addresses, contact aliases, contact relationships, and contact association with public users. When you consolidate contacts, users can search contacts or update contacts across agencies, and you can limit duplicate contacts in agency databases.

Agencies can only share contacts you create after you configure this Standard Choice. To share existing contacts, run a migration script to migrate the existing contacts from one agency to another. See “Migrating Existing Contacts across Multiple Agencies” in the Migration Scripts chapter of the *Civic Platform Migration Guide*.

The Standard Choice value is case-insensitive and must be the agency code that your super administrator defined when creating the agency. To find the correct agency code, see “Maintaining Agencies” in the Agencies and Functions chapter of the *Civic Platform On-Premise Administrator Supplement*.



Note:

Each involved agency must configure this Standard Choice in the same way.

CONTACT_ADDRESS_TYPE

Product

Civic Platform, Citizen Access, and Mobile Office

Type

System Switch

Description

This Standard Choice determines the contact address types you can add to the Contact Address tab in reference contacts.

Standard Choice values can include:

Home Address

Mailing Address

Physical Address

Work Address

If you set the Standard Choice [ENABLE_CONTACT_ADDRESS_VALIDATION](#) to Yes, a Validation Settings link displays besides each contact address type.

Standard Choices Item Name: CONTACT_ADDRESS_TYPE

Description: (250 char max)

Status: Enable Disable

Type: System Switch Shared drop-down EMSE Business Configuration

| Standard Choices Value | Value Desc | Active | |
|------------------------|------------|-------------------------------------|--|
| Billing Address | | <input checked="" type="checkbox"/> | Delete Validation Settings |
| Home Address | | <input checked="" type="checkbox"/> | Delete Validation Settings |
| Mailing Address | | <input checked="" type="checkbox"/> | Delete Validation Settings |
| Office Address | | <input checked="" type="checkbox"/> | Delete Validation Settings |

Update Add Cancel

You can click the Validation Settings link to configure the validation details (see [Table 76: Contact Address Validation Settings](#)).

Validation Settings

Use this form to set up validation setting information.

Address Type: Home Address

Validation Source: EXTERNAL_CONTACT_ADDRESS_SOURCE_USPS ▾

Note: The external validation source options are defined with Standard Choices that begin with "EXTERNAL_CONTACT_ADDRESS_SOURCE".

Validation is required: Yes No

Only for [Specific Countries](#)

Table 76: Contact Address Validation Settings

| Field | Description |
|------------------------|--|
| Address Type | This field displays the contact address type for which you are configuring the validation settings. |
| Validation Source | Select an Standard Choice EXTERNAL_CONTACT_ADDRESS_SOURCE_[SOURCE NAME] which contains the validation source information, that is, the addresses of an external address source. |
| Validation is required | Select Yes if you require validation for the current contact address type. Otherwise, select No. |
| Only for... | <p>This link displays if you set Yes for the "Validation is required" field. You can click the Specific Countries link at this field to select the countries for which you want to validate the addresses.</p> <div style="text-align: center;"> <p>Select Country</p> <p>Use this form to select countries.</p> <p><input type="checkbox"/> Country</p> <p><input checked="" type="checkbox"/> United States</p> <p><input type="checkbox"/> Canada</p> <p><input type="checkbox"/> China</p> <p><input type="checkbox"/> Japan</p> <p><input type="button" value="Save"/> <input type="button" value="Cancel"/></p> </div> <p>The country option(s) listed at the top is the value(s) from the Standard Choice COUNTRY_DEFAULT_VALUE, and the remaining options are from the values in the Standard Choice COUNTRY.</p> <p>If you do not select any country, Civic Platform validates all the addresses.</p> <p>If you select some countries, Civic Platform validates only the addresses in the selected countries.</p> |

CONTACT_PREFERRED_CHANNEL

Product

Civic Platform, Citizen Access, and Mobile Office

Type

System Switch

Description

With this Standard Choice, you can define the value options for the Preferred Channel drop-down list in a contact.

Standard Choice values can include:

Fax

Phone

Email

CONTACT RELATIONSHIP

Product

Civic Platform, Citizen Access, and Mobile Office

Type

System Switch

Description

With this Standard Choice, you can define the value options for the contact relationship drop-down list.

Standard Choice values can include:

Payor

Property Owner

Citizen

CONTACT TYPE

Product

Civic Platform, Citizen Access, and Mobile Office

Type

System Switch

Description

This Standard Choice defines three classifications of contact types:

- Contact types for reference, which are generic contact types such as Individual and Organization used in reference
- Contact type for transaction, which are role-specific contact types in daily transactions, such as Billing Contact, and Complainant.
- Contact types for both (reference and transaction).

The values you enter for this Standard Choice populate the Type drop-down list in the Contacts portlet.

Defines the Standard Choice values in the Standard Choices portlet in the Setup Admin ([Editing Standard Choices in the Setup Admin](#)).

Standard Choices: CONTACT TYPE

Submit New Delete Help

Standard Choices Item Name: CONTACT TYPE

Description: (250 char max) CONTACT TYPE DROP DOWN LIST FOR THE APPLICANT OR ANY CONTACTS.

Status: Enable Disable

Type: System Switch Shared drop-down EMSE Business Configuration

| <input type="checkbox"/> Contact Type * | For Reference/Transactions | Active | Template | Document Group | Contact Address Types |
|---|----------------------------|-------------------------------------|--------------|--------------------|---|
| <input type="checkbox"/> Assigned Planner | Both | <input checked="" type="checkbox"/> | CXP_ASI | | Associated Contact Address Type |
| <input type="checkbox"/> Association | Both | <input checked="" type="checkbox"/> | CHECK ALIAS | ARLENE | Associated Contact Address Type |
| <input type="checkbox"/> Beneficiary | Both | <input checked="" type="checkbox"/> | B_CBAC | | Associated Contact Address Type |
| <input type="checkbox"/> Billing Contact | Both | <input checked="" type="checkbox"/> | CHECK ALIAS2 | BUILDING*NEW*()<-> | Associated Contact Address Type |

Table 77: CONTACT TYPE Standard Choice Values

| Value | Description |
|-----------------------------|---|
| Contact Type | <p>Enter the contact type. Some examples are: Appellant, Applicant, Business Owner, Complainant, Individual, Organization, President, Secretary, Submitter, Treasurer.</p> <p> Note: The Individual contact type replaces the hard-coded Public User contact type. People templates, previously associated with Public User, associate with Individual contact type.</p> |
| Contact Type English (US) | Enter the translation for the contact type for internationalization. |
| Document Group | <p>If the contact type is for reference or for both (reference and transaction), select a document group to associate with the contact type. When users add a document to a reference contact in Civic Platform, the document group configured for the contact type is the default document group. Users can change the document group if necessary.</p> <p>When users add a document to a contact on the Account Management page in Citizen Access, users can only select a document type from the document group configured for the contact type as the document type of the document.</p> <p>When users add a document from a record to the record-associated contact, the selected document type in the record becomes the document type of the contact document.</p> |
| For Reference/ Transactions | Select whether the contact types are applicable for reference contacts, or for transaction contacts, or for both. |
| Active | Mark the check box to include this item on the list of Standard Choices. |
| Template | <p>Select the generic template (ASI group) that applies to each contact type.</p> <p> Note: A contact type can still associate with one or more people templates in Civic Platform Classic. Both people templates and ASI group can work for a contact type.</p> |
| Contact Address Types | If you set the Standard Choice ENABLE_CONTACT_ADDRESS to Yes, the “Associated Contact Address Type” link displays beside each contact type. You can click the link to associate one or more address types configured in the Standard Choice CONTACT_ADDRESS_TYPE to the contact type. |

| Value | Description | | | | | | | | |
|---|---|---|-----------------------------------|--|-----------------------------------|--|-----------------------------------|---|--|
| | <p>Contact Type - Associate Contact Address Type</p> <p>Use this form to associate one or multiple address types to a Contact Type.</p> <p>Contact Type: Applicant</p> <p>Address Type:</p> <table> <tr> <td><input checked="" type="checkbox"/> Company Address</td> <td><input type="checkbox"/> Required</td> </tr> <tr> <td><input checked="" type="checkbox"/> E-mail Address</td> <td><input type="checkbox"/> Required</td> </tr> <tr> <td><input checked="" type="checkbox"/> Home Address</td> <td><input type="checkbox"/> Required</td> </tr> <tr> <td><input checked="" type="checkbox"/> Mailing Address</td> <td><input checked="" type="checkbox"/> Required</td> </tr> </table> <p><input type="button" value="Save"/> <input type="button" value="Cancel"/></p> <p>If you mark the contact address type for a contact type, when users create or edit a record contact, they can add contact addresses of the associated types for the contact according to the contact type. If you mark the contact address type as required, users must enter at least one address of the required type for the record contact. If you unmark all of the contact address types for a contact type, users can actually add any types of contact addresses for a record contact with the contact type.</p> | <input checked="" type="checkbox"/> Company Address | <input type="checkbox"/> Required | <input checked="" type="checkbox"/> E-mail Address | <input type="checkbox"/> Required | <input checked="" type="checkbox"/> Home Address | <input type="checkbox"/> Required | <input checked="" type="checkbox"/> Mailing Address | <input checked="" type="checkbox"/> Required |
| <input checked="" type="checkbox"/> Company Address | <input type="checkbox"/> Required | | | | | | | | |
| <input checked="" type="checkbox"/> E-mail Address | <input type="checkbox"/> Required | | | | | | | | |
| <input checked="" type="checkbox"/> Home Address | <input type="checkbox"/> Required | | | | | | | | |
| <input checked="" type="checkbox"/> Mailing Address | <input checked="" type="checkbox"/> Required | | | | | | | | |

CONTACT_TYPE_ENABLE

Product

Civic Platform, Citizen Access, and Mobile Office

Type

System Switch

Description

This Standard Choice determines whether users can specify if the type of contact they enter into the Applicant or Contact section of a permit application is an individual or an organization. When a user selects the Individual contact type button, Civic Platform enables the First Name, Middle Name, Last Name, and SSN fields, and disables the Organization Name, DBA/Trade Name, and FEIN fields. When a user selects the Organization contact type button, Civic Platform enables the Organization, DBA/Trade Name, and FEIN fields, and disables the First Name, Middle Name, Last Name, and SSN fields.

Standard Choice values can include:

Yes

No

CONTENT_TEMPLATE_LIST

Product

Civic Platform

Type

System Switch

Description

- This system-defined Standard Choice determines the types of email templates that you can create. The values you enter for this Standard Choice populate the Type drop-down list in the Content Customize portlet.

For example, you can create an email template for the subject line section and content section of a hearing email notification or a hearing email change notification.

Standard Choice values can include:

EMAIL_NOTICE_HEARING_SUBJECT. Involves hearing email notifications.

EMAIL_NOTICE_HEARING_CONTENT. Involves hearing email notifications.

EMAIL_NOTICE_HEARING_CHANGE_SUBJECT. Involves hearing email change notifications.

EMAIL_NOTICE_HEARING_CHANGE_CONTENT. Involves hearing email change notifications.

ACA_EMAIL_ACCOUNT_VERIFICATION_BY_HYPERLINK_CONTENT. Involves the activation email that Citizen Access sends to the registrant after registering for an account.

ACA_EMAIL_ACCOUNT_VERIFICATION_BY_HYPERLINK_SUBJECT. Involves the activation email that Citizen Access sends to the registrant after registering for an account.

CONTINUING_EDUCATION_REQUIRED_HOURS

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice stores the required Continuing Education hours in the license settings portlet.



Note:

Civic Platform automatically configures this Standard Choice; do not modify.

CONTINUING_EDUCATION_WORKFLOW_TASK_STATUS

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice stores the Continuing Education workflow configuration in the license settings portlet.



Note:

Civic Platform automatically configure this Standard Choice; do not modify.

COST_FACTOR

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the cost factors to use in the calculation of total cost quantity. You must specify both a numeric value and a description for each cost factor.

With this Standard Choice, users enter the cost quantities by cost factors in the Quantity section when they add a cost item. Civic Platform multiplies every cost quantity by the numeric value of the cost factor, and then sums up the results to get the total quantity of the cost item.

Standard Choice values can include:

{Enter a numeric value representing the cost factor.}

1

1.5

2

Value Desc:

{Enter the description of the cost factor.}

Regular

Overtime

Holiday

COUNTRY

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice defines a list of countries that can be available for selection in the Country/Region drop-down list across Civic Platform and Citizen Access. If your agency does not enable or define this Standard Choice, the Country/Region drop-down list displays the countries that the STANDARDDATA agency defines in the Standard Choice COUNTRY.

Standard Choice value can be:

{Enter a country code. For example, you can add a country code US for the United States or JP for Japan. See [Figure 10: Country/Region List in Civic Platform](#) as an illustrative example.}

Value Desc:

{Enter the full name of the country. For example, United States, Japan.}

The Country Standard choice provides enhanced functionality when it is utilized with the Standard Choices [PHONE_NUMBER_IDD_ENABLE](#) and [PHONE_NUMBER_IDD](#).

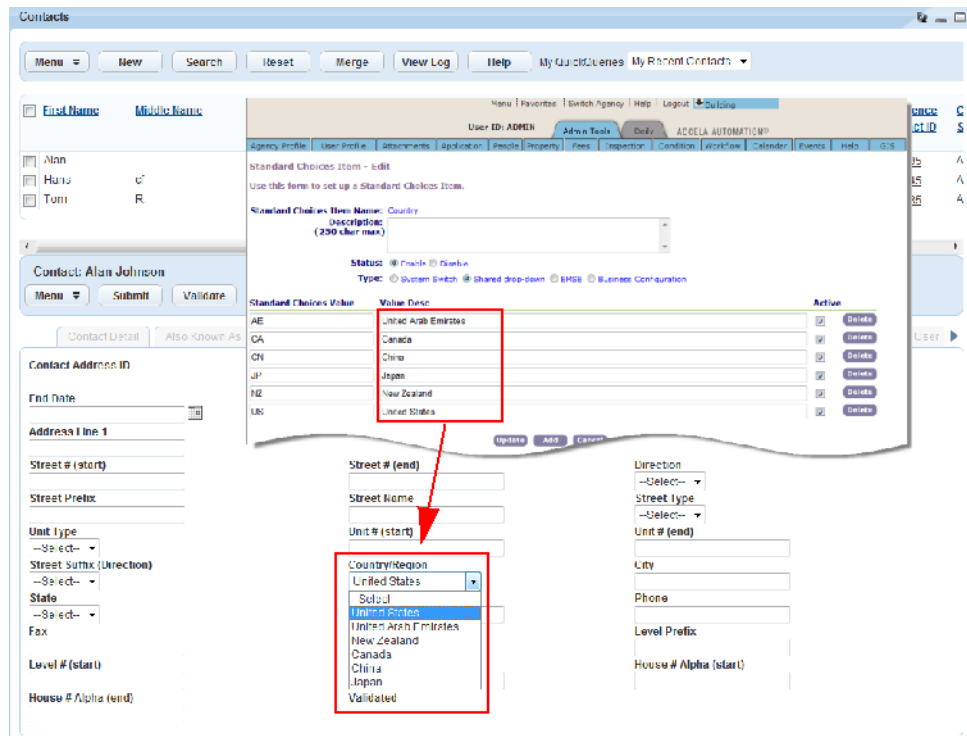


Figure 10: Country/Region List in Civic Platform

CREATE_NEW_INSPECTION_WHEN_RESCHEDULE

Product

Civic Platform, Mobile Office

Type

System Switch

Description

This Standard Choice controls whether Civic Platform creates a new inspection record or whether Civic Platform updates the original inspection record when an agency user reschedules an inspection.

Standard Choice values can include:

Yes. The default. Civic Platform creates a new inspection record when an agency user reschedules an inspection.

No. Civic Platform changes the information and keeps the Scheduled status on the original inspection record.

CREATE_NEW_ITEM_DEFAULT_SIZE

Product

Civic Platform

Type

System Switch

Description

Defines the size of the Create New drop-down menu accessed from the Create New button. The numeric Standard Choice value controls how many items you want to display by default. Any remaining items configured to display in the drop-down menu show when users click the See All link in the bottom right corner of the drop-down menu, which expands the view. Civic Platform displays the option as inactive to users with restricted access to items in the drop-down menu.

CREATE_NEW_ITEMS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls which items Civic Platform lists in the Create New portlet, which affects the display and display order of the Create New drop-down list.



Note:

Per best practice, do not make any modifications from the default settings for this Standard Choice.

CUSTOMIZED_TRACKING_NBR

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls whether to generate default or customized tracking numbers (Tracking #) for new records. If you set this Standard Choice to Yes, all records use customized tracking numbers which administrators must define for the B1PERMIT.B1_TRACKING_NBR database field in the EMSE events ApplicationSubmitAfter, ConvertToRealCapAfter and WorkflowTaskUpdateAfter. Administrators must ensure the uniqueness of the tracking number for each record. If the Standard Choice is No or undefined, all records use the default tracking numbers automatically generated by Civic Platform.

Standard Choice values include:

Yes

No

DATA_MANAGER_MAX_RECORD_NUMBER

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines the maximum number of records that you can include in a single export job or import job.

Set the Standard Choice value to the numeric quantity of records that you want to include in a single export job or import job. If undefined, the value defaults to 1,000.

DEBUG

Product

Civic Platform

Type

System Switch

Description

This standard choice enables agency administrators to perform root-cause analysis for upload failures.

Add the standard choice value `ENABLE_DOCUMENT_DEBUG` to perform root-cause analysis specifically for document upload failures.

Standard Choice value descriptions for `DEBUG/ENABLE_DOCUMENT_DEBUG` include:

YES to enable the document upload log.

NO to disable the document upload log (default value is NO).

DEFAULT_LIST_ROWS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines how many result rows display for each group list page in the Global Search result portlet. For example, if the Standard Choices value is 5, then a user views a default list of 5 items in each of the result groups in the Global Search result portlet.

Standard Choice values include:

{Set it to a number of rows you want to display in each group result list portlet. The default value is 10.}

DEFAULT_HOUSING_UNITS

Product

Civic Platform and Mobile Office

Type

System Switch

Description

This Standard Choice populates a default value in the Housing Units field. The Housing Units field appears in various locations such as:

- The Addtl Info tab for a record in Civic Platform

- The Additional Information tab for a record in Mobile Office
- The Record Information tab for an inspection in Mobile Office

The Standard Choices value includes:

{Enter a non-negative value as the default number of housing units.}

DEFAULT_NUMBER_BUILDINGS

Product

Civic Platform and Mobile Office

Type

System Switch

Description

This Standard Choice populates a default value in the Number of Buildings field. The Number of Buildings field appears in various locations such as:

- The Addtl Info tab for a record in Civic Platform
- The Additional Information tab for a record in Mobile Office
- The Record Information tab for an inspection in Mobile Office

The Standard Choices value includes:

{Enter a non-negative value as the default number of buildings.}

DEFAULT_JOB_VALUE

Product

Civic Platform, Citizen Access, and Mobile Office

Type

System Switch

Description

This Standard Choice populates a default Job Value amount in the Job Value field. The Job Value field appears in various locations such as:

- The Addtl Info tab for a record in Civic Platform
- The Additional Information tab for a record in Mobile Office
- The Record Information tab for an inspection in Mobile Office

The Standard Choices value includes:

{Enter a non-negative value as the default job value.}

DEFAULT_TEMPLATE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the default template fields in the three portlets under License Certifications. The values define portlets. The Value Desc can be ASI group code.

Standard Choice values can include:

Continuing_Education

Education

Examination

Value Desc can include:

BARB_CA

BACKED

SECURITYGUARD

DEPARTMENT_PICKER_TYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines how the department options are available for users to select in a record search or activity search. If the Standard Choice value is Tree, the department options display in a hierarchy tree; if the Standard Choice value is Dropdown List, then the department options are accessible from the drop-down list.

Standard Choice values can include:

Tree (Default)

Dropdown List

DEPOSIT_FOR

Product

Civic Platform

Type

System Switch

Description

The Standard Choice values define the choices in the Deposit For drop-down list on the Transactions tab of the Trust Account detail portlet.

The screenshot shows a web application interface for a payment transaction. At the top, there is a navigation bar with buttons for Menu, Submit, Reset, Cancel, and Help. Below this is a tabbed interface with tabs for Payment, Payment History, PM Schedule, Professionals (0), Random Audit History (0), Related Records (0), and Renewal (0). The main form area contains several fields: Account ID (with a sub-field TA FOR CONTACT), Payment Method (dropdown menu set to Cash), Amount (text input), Received (dropdown menu set to Select), Transaction Type (dropdown menu set to DEPOSIT), Reference # (text input), CC Auth. Code (text input), Payor (text input), and Deposit For (dropdown menu set to --Select--). There is also a Comments section with a text area and a 'check spelling' link.

Standard Choice values can include:

Residential BWR

Commercial BCD

Value Description:

Residential Building Work Request

Commercial Building Control Division

DISABLE_APO_TEMPLATE_DATA_VALIDATION

Product

Civic Platform

Type

System Switch

Description

When you enable address, parcel, or owner validation in the application intake form, this Standard Choice determines whether to validate address, parcel, or owner template data against default values.

Standard Choice values include:

ADDRESS

PARCEL

OWNER

By default, Civic Platform validates the template data according to the validation setting in the SmartChoice. If you add ADDRESS/PARCEL/OWNER in the Standard Choice value, Civic Platform does not validate the template data in the application intake form, even if you enable address/parcel/owner validation.

DISABLE_CITY_STATE_DEFAULT

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls whether your agency applies the default City and State values in the licensed professional search form. If the Standard Choice is active and the City/State are on the form, their

associated values remain blank by default. If the Standard Choice is not active and the City/State is not on the search form, Civic Platform includes the City/State in the search criteria.

Standard Choice values can include:

PROFESSIONAL

Value Description:

Licensed Professional

DISABLE_EXPAND_RECORDSET

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines whether the query engine is on or off in the Address Search, Asset, Asset Condition Assessment, Part Inventory, and Preventative Maintenance Schedule list portlets. When the query engine is on, a search can return more than 100 records at a time.

Standard Choice values can include:

Yes. The query engine is off.

No. The query engine is on. The default value is No.

DISABLE_FEE_CALC_FACTOR_DROPDOWN_FOR_MODULES

Product

Civic Platform

Type

System Switch

Description

This Standard Choice value defines the modules for which Civic Platform hides the Fee Calc. Factor drop-down list field. If a record belongs to one of the specified modules, the Fee tab of the record does not show the Fee Calc. Factor drop-down list.

Standard Choice values can include:

{Each value must be one of the modules, spelled exactly as it appears in the module drop-down list in Civic Platform.}

DISABLE_GIS_NEARBY_QUERY

Product

GIS

Type

System Switch

Description

This Standard Choice disables users to search 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. Agency administrators also need to clear the Nearby Query check box through the GIS Administration site so the Search Scope drop-down list is not available in the GIS Search panel. The drop-down list contains the Within Map Extent, Within Selected Feature, and Near Selected Feature options. For more information about the Nearby Query check box, see “Configuring Global Variable Settings” of the Configuring Agency Settings chapter in the GIS Administrator Guide.

Standard Choice values can include:

Y

Yes

DISPLAY_INSPECTION_COMMENT_IN_ACA

Product

Citizen Access

Type

System Switch

Description

This Standard Choice defines whether all the inspection comments are viewable by all users in Citizen Access. Only when the Standard Choice Value is Yes, the settings in “Comment Display in ACA” and “Display Comment in ACA” in every inspection do not work.

Standard Choice values are:

Yes. Yes displays all inspection comments to all users in Citizen Access, regardless of the settings in “Comment Display in ACA” and “Display Comment in ACA” in every inspection.

No. Whether all inspection comments display or not based on the settings in “Comment Display in ACA” and “Display Comment in ACA” in every inspection.

DISPLAY_RECORD_DOCUMENTS (INSPECTION)

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines whether to include inspection documents on the Documents tab of a record or not.

Standard Choice values are:

Yes. Displays inspection documents on the Documents tab of a record (default).

No. Displays all documents except inspection documents on the Documents tab of a record.

DISPOSITION

Product

Civic Platform, Mobile Office

Type

System Switch

Description

With this Standard Choice, you can define the value options in the Disposition drop-down list, which are possible reasons for change in chain of custody.

Standard Choice values can include:

Released

Destroyed

Sent to Court

DOCUMENT_AUDIT_ACTION_TYPES

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the value options of the Action Type drop-down list on the Document Audit Log.

Standard Choice values can include:

EDMS Review

Status Comments

E_CODES

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines an external URL as an Accela toolbar button in Adobe Acrobat X Pro. The Standard Choice value specifies the button name, and the Value Desc specifies the URL address, for example, a URL to a government site that publishes municipal laws and municipal regulations. Users can click the toolbar button to open the external URL.

EDMS

Product

Civic Platform, Citizen Access, and Mobile Office

Type


System Switch

Description

This Standard Choice defines the EDMS server configuration information. The Standard Choice value specifies the EDMS system name. The Value Description contains all configuration parameters for the EDMS system.

By default, EDMS_DOCUMENT_SIZE_MAX is 16 MB for global use. You can add ACA_EDMS_DOCUMENT_SIZE_MAX=<number>MB to the Value Description to determine the maximum file size for Citizen Access. EDMS_VENDOR, EDMS_DOCUMENT_SIZE_MAX and ACA_EDMS_DOCUMENT_SIZE_MAX are applicable to all EDMS systems.

Table 78: EDMS Standard Choice Values

| Standard Choice Value | Value Description |
|-----------------------|--|
| ADS | <p>For ADS, the Value Description must follow this convention: EDMS_VENDOR=ADS;ADSSERVER_URL=<Your URL goes here>;ADS_SERV_PROV_CODE=<ADS server provided code>; ADS_CLEARANCE_KEY=<ADS clearance key assigned for agency>; ADS_SECURITY_KEY=<ADS security key assigned for agency>; EDMS_DOCUMENT_SIZE_MAX=<Number>MB;ACA_EDMS_DOCUMENT_SIZE_MAX=<Number>MB.</p> <p>Example: EDMS_VENDOR=ADS;ADS_SERVER_URL=http://10.50.130.36/DocumentService/index.cfm;ADS_SERVER_SECURITY_KEY=BRIDGEVIEW1234;ADS_SERV_PROV_CODE=ADS720;ADS_CLEARANCE_KEY=ZZVPNRUQDL49HJXUOEH93GPU37JD1S;ADS_SECURITY_KEY=Z2BWZEIO9AB0YDR825VYH7GP9AG8HV;EDMS_DOCUMENT_SIZE_MAX=16MB;ACA_EDMS_DOCUMENT_SIZE_MAX=8MB</p> |
| ACCELA | <p>For ACCELA, the value description must follow this convention: EDMS_VENDOR=ACCELA;EDMS_DOCUMENT_SIZE_MAX= <Number>MB; ACA_EDMS_DOCUMENT_SIZE_MAX=<Number>MB.</p> <p>Example: EDMS_VENDOR=ACCELA;EDMS_DOCUMENT_SIZE_MAX=16MB; ACA_EDMS_DOCUMENT_SIZE_MAX=8MB</p> |
| DOCUMENTUM | <p>For DOCUMENTUM, the value description must follow this convention: EDMS_VENDOR=STANDARD;URL=<Your URL goes here>;EDMS_DOCUMENT_SIZE_MAX=<Number>MB; ACA_EDMS_DOCUMENT_SIZE_MAX=<Number>MB</p> <p>Example: EDMS_VENDOR=STANDARD;URL=http://slcimpl.accela.com:8888/portlets/services/AccelaDocumentService;EDMS_DOCUMENT_SIZE_MAX=16MB;ACA_EDMS_DOCUMENT_SIZE_MAX=8MB</p> <p> Note: Civic Platform has supported template fields (ASI fields and ASI table fields) on a document since the 7.2.0 release. To enable all template field functionality such as saving ASI fields to the EDMS during report generation, set up a Standard EDMS with the string "VERSION=7.2.0" appended to the end of the value description. For example, EDMS_VENDOR=STANDARD;URL=http://slcimpl.accela.com:8888/portlets/services/AccelaDocumentService; EDMS_DOCUMENT_SIZE_MAX=16MB; ACA_EDMS_DOCUMENT_SIZE_MAX=8MB;VERSION=7.2.0</p> |

EDUCATION_DEGREE

Product

Civic Platform, Citizen Access

Type

System Switch

Description

The Standard Choice defines the value options in the Education Degree drop-down list. Civic Platform provides four values by default, Bachelor, Master, MBA, and PhD. You can change or modify these values during configuration.

For example, if common degree requirements at your agency include a high school diploma, Masters of Education (MEd), professional degrees (such as DDM or DDS for dentists), or JD for lawyers, you can add these degrees to the list.

Standard Choice values can include:

Bachelor

Master

PhD

MBA

E-MAIL_PAYMENT_NOTICE_DISABLE

Product

Citizen Access

Type

System Switch

Description

Citizen Access sends a receipt when a public user completes a record and the fee payment for the record. It also sends an email with instructions for the next step in a workflow. If there is no more step in the workflow, the email is blank and should therefore not be sent. This Standard Choice disables that email.

{Each value must be one of the modules, spelled exactly as it appears in the module drop-down list in Civic Platform.}

EMSE_Settings

Product

Civic Platform

Type

System Switch

Description

At the triggering of an event, the EMSE Message List window appears in the front of other windows so that users can easily notice the event execution results. This Standard Choice enables administrators to configure the length of period during which the window has the focus.

Table 79: EMSE_Settings Standard Choice Values

| Standard Choice Values | Value Description | Description |
|------------------------|---|---|
| AUTO_FOCUS_DELAY | Enter a numeric value. The unit of the value is second. | <p>The value defines the length of period (in seconds) during which the EMSE Message List window has the focus after it appears. After the period, the focus changes to the Civic Platform page where the event is triggered.</p> <p>If the Standard Choice is undefined, the focus stays with the EMSE Message List window</p> |

| Standard Choice Values | Value Description | Description |
|------------------------|-------------------|--|
| | | for 5 seconds before it goes to the previous page. |

ENABLE_ADD_MULTIPLE_CONDITIONS

Product

Civic Platform, Mobile Office

Type

System Switch

Description

If this Standard Choice value is Yes, users can add multiple conditions to a record or other object in one submit process.

Standard Choice values can include:

Yes. Users can add multiple conditions to a record in one submit process.

No. Users can add only one condition to a record in one submit process.

ENABLE_AMO_ONLINE_REPORT

Product

Mobile Office

Type

System Switch

Description

This Standard Choice controls whether Mobile Office users can run online reports for inspections from the Inspection list page, Inspection detail page, or the Job List page. Online reports refer to the reports that administrators add in the Mobile Office Reports category in Report Manager. Mobile Office users run online reports directly against the data in the Civic Platform database.

The Standard Choices values include:

Yes. Enables the Online Report button on the Inspection list page and Job List page, and the Create Online Report button on the Inspection detail page.

No. Disables the Online Report and Create Online Report buttons.

If you change the Standard Choice setting, users must restart Mobile Office to make the change take effect.

ENABLE_ANONYMOUS_REPORT

Product

Citizen Access

Type

System Switch

Description

This Standard Choice provides the ability to extend or limit report functionality to anonymous users in Citizen Access.

The Standard Choices values include:

- Y.** Extends the functionality of running reports to anonymous users.
- N.** Only registered users have access to run reports.

ENABLE_AUTO_POPULATE_PARCEL_OWNER

Product

Citizen Access

Type

System Switch

Description

With this Standard Choice, you can enable Citizen Access to automatically populate the parcel owner information in the application intake form and the renewal form.

Standard Choice values can include:

Yes

ENABLE_CAP_TYPE_ALIAS

Product

Civic Platform, Citizen Access, and Accela Wireless

Type

System Switch

Description

This Standard Choice allows users to view record type alias names instead of viewing the standard four-level record type of group, type, subtype, and category.

After enabling this Standard Choice, administrators must also edit the application categories for which they want to display an alias and assign the aliases they want to use.

To display alias names for Citizen Access users, select the "Enable for ACA - Enable Application" option on the Application Category - Edit page.

Standard Choice values can include:

Yes. The Application Type Alias column name displays. If the Application Type Alias column does not display after setting the Standard Choice, check that you added the field to the portlet with the Form Portlet Designer tool.

No. The Application Type Alias column name does not display.

ENABLE_CONDITION_RESOLVED_DATE

Product

Civic Platform, Mobile Office

Type

System Switch

Description

This Standard Choice changes the behavior of the status date in conditions and conditions of approval. When you configure this Standard Choice, Civic Platform only updates the status date when you satisfy the conditions or conditions of approval.

Standard Choice values can include:

Yes. Save Applied conditions (including conditions of approval) without a status date. When users click Override Met Status and Mark condition As Pending actions on conditions of approval, the system clears the condition status date. If the condition status type is Not Applied, the field value always defaults to the date of the last status change, unless users specify a different date.

No. The field value always defaults to the date of the last status change, unless users specify a different date or remove the date from the field.

When users edit the condition status:

- In Civic Platform, you can create an expression to clear the status date field when users set the condition status to applied.
- Mobile Office can clear the status date (resolved date) when users edit the condition status to Applied.

ENABLE_CONTACT_ADDRESS

Product

Civic Platform, Citizen Access, and Mobile Office

Type

System Switch

Description

This Standard Choice controls the contact address feature.

Standard Choice values can include:

Yes. The Contact Address tab displays in the reference contact portlet, so users can manage contact addresses for reference contacts and records.

No. The Contact Address tab does not display in the reference contact portlet, and users cannot view or add contact addresses.

ENABLE_CONTACT_ADDRESS_VALIDATION

Product

Civic Platform, Citizen Access, and Mobile Office

Type

System Switch

Description

This Standard Choice controls whether you can require users to validate a new contact address against the external address source that you specify. You can configure the validation settings in the Standard Choice [CONTACT_ADDRESS_TYPE](#).

Standard Choice values can include:

Yes. In Civic Platform, users can click the Validate button in the Contact Address section or Contact Address tab page to validate a contact address. In Citizen Access or Mobile Office, when users save an address to the Contact Address section, an Matching Address Result form displays with the validation address.

No. There is no validation for new contact addresses.

ENABLE_CONTACT_TYPE_FILTERING_BY_MODULE

Product

Civic Platform, Citizen Access, and Mobile Office

Type

System Switch

Description

This Standard Choice enables or disables the limit on using specific contact types by module. You can use it with Standard Choice [ENABLE_CONTACT_TYPE_SECURITY](#) to control how Civic Platform, Citizen Access, and Mobile Office determine user access to record contacts by type. For more information, see [Table 80: Access Determination for Record Contacts by Type](#).



Note:

Before 7.2.0 release, you could limit the use of specific contact types by module in Citizen Access only. Since 7.2.0 release, you can set module-based limits on contact types either in this Standard Choice or in Citizen Access, and the setting takes effect in Civic Platform, Citizen Access, and Mobile Office. If it is the first time you add this Standard Choice, Civic Platform and Mobile Office can enforce the module-based limits previously set in Citizen Access.

When you set the Standard Choice to No, the module-based limits do not take effect in any of the products. When you do not add or you disable the Standard Choice, the module-based limits take effect in Citizen Access only.

Table 80: Access Determination for Record Contacts by Type

| ENABLE_CONTACT_FILTERING_BY_MODULE Value | Module List in Contact Type Setting Portlet | ENABLE_CONTACT_TYPE_SECURITY Value | Assign Contact Type Security To | User Access |
|--|---|------------------------------------|---|---|
| Yes | Added module | Yes | User, Group, Module (Highest priority first)) | In Civic Platform and Mobile Office, if you assign specific security levels to certain users, those users have specified access to the contact type from within the module while the other users have full access. In Citizen Access, the contact type is available to all users in the module unless you further define contact type security in the page flow. |
| | | No | N/A | In Civic Platform and Mobile Office, all users have full access to the contact type from within the module. In Citizen Access, the contact type is available to all users in the module unless you further define contact type security in the page flow. |
| | Not-yet-added module | N/A | N/A | In Civic Platform and Mobile Office, all users can view the existing contacts of the contact type and can change the contact type to a valid one from within the module, but cannot create new contacts of that type. In Citizen Access, the contact type is not available in the module. |
| No | Added module | Yes | User, Group, Module | In Civic Platform and Mobile Office, if you assign specific security levels to certain users, those users have specified access to the contact type |

| ENABLE_CONTACT_FILTERING_BY_MODULE Value | Module List in Contact Type Setting Portlet | ENABLE_CONTACT_TYPE_SECURITY Value | Assign Contact Type Security To | User Access |
|--|---|------------------------------------|---------------------------------|---|
| | | | (Highest priority first)) | from within the module while the other users have full access. In Citizen Access, the contact type is available to all users in the module unless you further define contact type security in the page flow. |
| | | No | N/A | In Civic Platform and Mobile Office, all users have full access to the contact type from within the module. In Citizen Access, the contact type is available to all users in the module unless you further define contact type security in the page flow. |
| | Not-yet-added module | N/A | N/A | In Civic Platform and Mobile Office, all users have full access to the contact type from within the module. In Citizen Access, the contact type is available to all users in the module unless you further define contact type security in the page flow. |

ENABLE_CONTACT_TYPE_SECURITY

Product

Civic Platform, Mobile Office

Type

System Switch

Description

This Standard Choice controls whether Civic Platform and Mobile Office enforce contact type security on record contacts and reference contacts. ENABLE_CONTACT_TYPE_FILTERING_BY_MODULE can also affect the user access to certain contact types in record contacts. See [ENABLE_CONTACT_TYPE_FILTERING_BY_MODULE](#) for more information.

Standard Choice values can include:

Yes. Civic Platform and Mobile Office enforce the security that you have defined in the Contact Type Setting portlet.

No. Civic Platform and Mobile Office do not enforce any contact type security, regardless of whether you have defined it or not.

ENABLE_DISPLAY_ISLAMIC_CALENDAR

Product

Civic Platform, GIS

Type

System Switch

Description

This Standard Choice controls whether to support HRIJI (Islamic) dates and HRIJI (Islamic) calendar date picker.

Table 81: ENABLE_DISPLAY_ISLAMIC_CALENDAR Standard Choice Values

| Standard Choice Values | Value | Description |
|---------------------------------|-------------------|---|
| ENABLE_DISPLAY_ISLAMIC_CALENDAR | Yes | <p>The following date fields display dates in Islamic calendar format, and provide the HRIJI (Islamic) calendar date picker for users to pick a HRIJI (Islamic) date.</p> <ul style="list-style-type: none"> The Opened Date and Closed Date fields that displays when users select to search by records in the GIS map; All the date fields in the ASI or ASI table sections in Civic Platform and Citizen Access. <p>The following date fields display dates in Islamic calendar format.</p> <ul style="list-style-type: none"> The Opened Date and Closed Date fields in the Show Accela Record List window that displays when users perform the Show Accela Record command in the GIS map. |
| | No (or undefined) | All the date fields display in standard date format and provide a standard calendar date picker. |

ENABLE_EMSE

Product

Civic Platform

Type

System Switch

Description

Standard Choice values include:

Yes

No

ENABLE_EMAIL_NOTIFICATION_PROMPT

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines whether a user can choose an email template for meeting invites, and also controls whether email notification pop-up window displays.

Standard Choice values include:

Yes

No

ENABLE_EXPIRED_LICENSE

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice with Standard Choice value ENABLE_EXPIRED turns on expired license functionality and insurance notification functionality. The other Standard Choice values control whether to email a license expiration notification, business license expiration notification, or insurance expiration notification by email in Civic Platform or at login in Citizen Access.

Standard Choice values include:

ENABLE_EXPIRED

ENABLE_NOTIFY_LICENSE_EXPIRED_BY_EMAIL

ENABLE_NOTIFY_LICENSE_EXPIRED_AT_LOGIN

ENABLE_NOTIFY_BUSINESS_LICENSE_EXPIRED_BY_EMAIL

ENABLE_NOTIFY_BUSINESS_LICENSE_EXPIRED_AT_LOGIN

ENABLE_NOTIFY_INSURANCE_EXPIRED_BY_EMAIL

ENABLE_NOTIFY_INSURANCE_EXPIRED_AT_LOGIN

Value Description:

Yes. Enables the notification.

No. No disables the notification.

ENABLE_EXPRESSION_AND_SCRIPT_CACHE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls whether Civic Platform caches EMSE scripts and expressions for performance enhancement.

Value Description:

Yes. Civic Platform caches all the existing events, scripts, master scripts, and expressions. The cache list portlet (URL: https://<web_server_ip>:<web_server_port>/portlets/cache/cacheList.do) provides the following cache-clearing options for you to manually clear the cache: Expression Builder, Events, Scripts, and Master Scripts.

No. Civic Platform does not cache the existing events, scripts, master scripts, nor expressions. Every time users run an event, script, or expression, Civic Platform uses the most updated version.

ENABLE_MULTIPLE_CONDITION_GROUP_FOR_TYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines whether you can associate multiple condition groups with the same condition type.

Standard Choice values can include:

Yes

No

ENABLE_ORIGINAL_VALUATION_CALCULATOR

Product

Civic Platform

Type

System Switch

Description

If you set this Standard Choice to Yes, users can recalculate a fee based on the original valuation calculator after the update of the valuation calculator.

Standard Choice values can include:

Yes

No

ENABLE_PARCEL_ENDORSEMENT

Product

Civic Platform

Type

System Switch

Description

Set this Standard Choice to Yes to see the following behavior:

- When a user deletes a GIS object from the application intake form or from the GIS tab on the record detail portlet, Civic Platform removes parcels associated with the object.
- When a user adds a new GIS object from the GIS tab of the record detail portlet and there is an existing GIS object, the new object does not replace the existing object. Prior to this enhancement, if MULTIPLE_APO_GIS_SELECTION was set to No, the new object replaced the existing object for the same scenario.
- When a user deletes a parcel, either directly or by virtue of its association with a deleted address or owner, Civic Platform also removes GIS objects associated with the parcel.

ENABLE_PAYMENT_ENDORSEMENT

Product

Civic Platform

Type

System Switch

Description

You can set this Standard Choice value to Yes to display the Print Application Endorsement button on the receipt summary of a record (Record > Payment tab > Check receipt number > receipt summary).

ENABLE_PERMITS_PLUS_SEARCH

Product

Civic Platform

Type

System Switch

Description

This Standard Choice allows users of both the 'PERMITS' Plus permitting system and Civic Platform to search for records from both systems in Civic Platform and to associate 'PERMITS' Plus records to Civic Platform records.

Table 82: ENABLE_PERMITS_PLUS_SEARCH Standard Choice Values

| Standard Choice Value | Value Desc | Description |
|-----------------------|--|--|
| ENABLE | Yes, No | This value controls whether to enable 'PERMITS' Plus search in Civic Platform. |
| PP_WEB_SERVICE_URL | The 'PERMITS' Plus web service URL. For example: <code>http://206.80.21.46/perplusservice/perplusservice.asmx</code> | This value defines the 'PERMIT' Plus web service URL from which to search for records. |

ENABLE_SELECT_ADDRESS_OWNER_AFTER_PARCEL

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the way users attach address and owner objects to a record.

Standard Choice values can include:

Yes. Provides a message after parcel selection.

No. Attaches without a message.

ENABLE_SELECT_PARCEL_OWNER_AFTER_ADDRESS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the way users attach parcel objects and owner objects to a record.

Standard Choice values can include:

Yes. Provides a message after address selection.

No. Attaches without message.

ENABLE_THE_DISPLAY_OF_SECURITY_ANSWER

Product

Citizen Access

Type

System Switch

Description

This Standard Choice defines whether to display the answers to security questions as text or dots in the Public User administration portlet.

Standard Choice values can include:

Yes. The password request answers in each public user account display in plain text.

No. The password request answers in each public user account display in dots, so agency staff cannot view the answers.

ENFORCEMENT_DEFENDANT_EYE_COLOR

Product

Civic Platform, Mobile Office

Type

System Switch

Description

Specific to the Code Enforcement module, this Standard Choice enables you to define the value options for the drop-down list of the defendant eye color.

ENFORCEMENT_DEFENDANT_HAIR_COLOR

Product

Civic Platform, Mobile Office

Description

Specific to the Code Enforcement module, this Standard Choice enables you to define the value options for the drop-down list of the defendant hair color.

EVENT_ACTION

Product

Civic Platform

Description

You can use this Standard Choice to identify all possible event actions for the event manager and the script engine. The Standard Choice values you create populate the Action list in the script.

Each Standard Choice value must also have a corresponding Standard Choice.

For example, you can create a GIS proximity alert that checks whether night club applications are within 3000 feet of a church or school. In such a case, you might create an event action value named NIGHTCLUBCHECK, you must also create a new Standard Choice named NIGHTCLUBCHECK. The values for the NIGHTCLUBCHECK Standard Choice include the Distance and a description of 3000 feet.

Standard Choice values can include:

{Actions that you want to include for the event manager and the script engine.}

Value Desc provides the name of the javascript file that you add to the directory named “\eventmanager\javascript”.

{For example, /eventmanager/javascript/NIGHTCLUBCHECK.js.}

EVIDENCE_DISPOSITION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice populates the values in the Reasons drop-down list related to the chain of custody for the evidence.

Standard Choice values can include:

Released

Destroyed

Sent to Court

EVIDENCE_LOCATION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the value options for the Evidence Location drop-down list in the evidence form (new/edit).

Standard Choice values can include:

Evidence Room 1

Evidence Room 2

Evidence Room 3

EVIDENCE_TYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the value options for the Evidence Type drop-down list in the evidence form (new/edit).

Standard Choice values can include:

Firearms

Illicit Substances

Other

EVIDENCE_UNITS_MEASURE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the value options for the Evidence Unit of Measure drop-down list in the evidence form (new/edit).

Standard Choice values can include:

Ounces

Pounds

Inches

Feet

EXAM_CSV_FORMAT

Product

Civic Platform, Citizen Access


Type

System Switch

Description

With this Standard Choice, you can define the column titles to use in the CSV examination upload file.

Table 83: EXAM_CSV_FORMAT Standard Choice Values

| Standard Choice Value | Value Description | Description |
|-----------------------|--|---|
| AGENCY | Provide the column title. For example, COLUMN=Agency. | <p>This value defines the column title for AGENCY in the CSV file.</p> <p> Note: Education providers can upload exam scores for the applications that belong to a sub-agency from the main agency's Citizen Access site. Administrators must configure this Standard Choice value so the agency code column in a score CSV file can correctly show the name for the agency that each application belongs to. If you do not properly enable or configure the Standard Choice value, the agency code column always displays the name of the main agency. In a multiple-agency administration, you can only add this Standard Choice value for the main agency.</p> |
| ALTID | Provide the column title. For example, COLUMN=ALTID. | This value defines the column title for ALTID in the CSV file. |
| DATE | Provide the column title. For example, COLUMN=Date;TYPE=Date;FORMAT=MM/dd/yyyy. | This value defines the column title, type and format for DATE in the CSV file. |
| EXAM_NAME | Provide the column title. For example, COLUMN=Examination Name. | This value defines the column title for EXAM_NAME in the CSV file. |
| GRADING_STYLE | Provide the column title. For example, COLUMN=Grading Style;TYPE=Enum;FORMAT=none passfail score percentage. | This value defines the column title, type and format for GRADING_STYLE in the CSV file. |
| PASSING_SCORE | Provide the column title. For example, COLUMN=Passing Score. | This value defines the column title for PASSING_SCORE in the CSV file. |
| PROVIDER_NAME | Provide the column title. For example, COLUMN=Provider Name. | This value defines the column title for PROVIDER_NAME in the CSV file. |
| PROVIDER_NBR | Provide the column title. For example, COLUMN=Provider Number. | This value defines the column title for PROVIDER_NBR in the CSV file. |
| SCORE | Provide the column title. For example, COLUMN=Score. | This value defines the column title for SCORE in the CSV file. |

EXAMINATION_WORKFLOW_TASK_STATUS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice stores the examination workflow configuration in the license settings portlet.

**Note:**

Do not modify this Standard Choice.

EXPIRATION_INTERVAL_UNITS

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice defines the value options for the drop-down list of license expiration intervals.

Standard Choice values can include:

Days

Months

Years

EXPIRATIONDATE_DISPLAY_FLAG

Product

Civic Platform

Type

System Switch

Description

This Standard Choice allows you to control the display of the expiration date field on the credit card payment review screen.

Standard Choice values can include:

Yes. The expiration date displays on the payment review screen.

No. The credit card expiration date does not display on the payment review screen.

EXPORT_MAX_RECORDS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines how many records you can export in CSV (Comma Separated Value) format.

By default, agency users can export up to 1000 records. If you want to give agency users the option to export more than 1000 records, configure this Standard Choice with an export maximum value greater than 1000.

EXTERNAL_ADDRESS_SOURCE

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

This Standard Choice defines the external address source. Agencies can use existing APO repository information and maintain just one APO repository for all its needs.

Table 84: EXTERNAL_ADDRESS_SOURCE Standard Choice Values

| Standard Choice Value | Value Desc | Description |
|----------------------------------|------------|---|
| CAN_CONTAIN_OWNERS | YesNo | <p>This value specifies whether the owner information associated with the selected address can populate within the application. If you set the value description to Yes, the Owner tab of the reference Address detail portlet can list all the owners related to the address.</p> <p>If you set the value description fields for CAN_CONTAIN_OWNERS and CAN_CONTAIN_PARCELS to Yes and you enable FID 8232 Get Parcel And Owner, Civic Platform exposes the Get Parcel & Owner button on the Address section of the application intake form.</p> |
| CAN_CONTAIN_PARCELS | YesNo | <p>This value specifies whether the parcel information associated with the selected address can populate within the application. If you set the value description to Yes, the Parcel tab of the reference Address detail portlet can list all the parcels related to the address.</p> |
| SOURCE_ATTRIBUTES_MAPPING_ENABLE | YesNo | <p>This value specifies whether the external APO data source handles the mapping between the address template attributes and the GIS map layer fields. When Civic Platform uses GIS as its external APO data source and each APO template attribute is mapped to a GIS map layer field, users can search for external APO data by template attribute.</p> |

| Standard Choice Value | Value Desc | Description |
|---------------------------|---|--|
| SOURCE_AUTH_PWD | Enter the web service authentication user password. | This is the user password for accessing the web service. |
| SOURCE_AUTH_USER | The web service authentication user name. | This is the user name for accessing the web service. |
| SOURCE_ID | A unique ID. | This value identifies the source in the code. |
| SOURCE_LOCATION | InternalExternal | The location option for the external APO source (Internal or External). Internal indicates that Civic Platform uses the current Civic Platform reference APO as the source. |
| SOURCE_MAP_SERVICE_ID | Map Service ID. | This value specifies the map service from which you want to retrieve geocoded addresses as external addresses. |
| SOURCE_METHOD | Web service | The APO source method to connect to the external source. Civic Platform only supports web service. |
| SOURCE_NAME | Enter the source name. | The name of the external source. |
| SOURCE_URL | The external APO source URL. For example, http://source.url/sur.wsdl. | - |
| WEB_SERVICE_SSL_SUPPORTED | Yes No True False. Default: Yes | This value defines whether the web service needs SSL data transfer. |
| IS_XML_DATA | Yes No. Default: No | Specifies whether to use the XML data source. |
| XAPO_CLIENT_VERSION | 7.2.3 | 7.2.3 stands for Civic Platform Version 7.2.0 Feature Pack 3. In 7.2.0 Feature Pack 3, Civic Platform added 5 address fields: House # Alpha (start), House # Alpha (end), Level Prefix, Level # (start), and Level # (end). You must define this Standard Choice value so users can search for addresses by the 5 address fields in the external APO source. |

EXTERNAL_CONTACT_ADDRESS_SOURCE_[SOURCE NAME]

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

This Standard Choice determines the external validation source for contact addresses. You can configure multiple sources, and specify the name of each source in the [SOURCE_NAME] portion.

You can define the Standard Choices in the same way as for the Standard Choice

[EXTERNAL_ADDRESS_SOURCE](#). See [Table 84: EXTERNAL_ADDRESS_SOURCE Standard Choice Values](#) for the Standard Choice values and description.

EXTERNAL_DOC_REVIEW

Product

Civic Platform

Type

System Switch

Description

This Standard Choice is used for connectivity and authentication of the third party plan review tool. It also enables the mapping portlet for the named plan review tool. See Mapping Data for Third Party Document Review in the *Civic Platform Administration Guide* for more information.

Before proceeding with standard choice configuration, make sure you 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 so you can use them when configuring this standard choice.

| Standard Choices Value | Value Description |
|------------------------|---|
| ACCOUNT | <pre>user name=<enter account name for API account you created>; password=<enter password for API account you created></pre> |
| PRODUCT | <product name> (e.g., EPC) |
| WEB_SERVICE_URL | <web service url for API account you created> |

EXTERNAL_OWNER_SOURCE

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

This Standard Choice defines the external owner source. Agencies can use existing external APO repository information and maintain just one APO repository for all its needs.

Table 85: EXTERNAL_OWNER_SOURCE Standard Choice Values

| Standard Choice Value | Value Desc | Description |
|----------------------------------|---|--|
| SOURCE_ATTRIBUTES_MAPPING_ENABLE | YesNo | This value specifies whether the external APO data source handles the mapping between the owner template attributes and the GIS map layer fields. When Civic Platform uses GIS as its external APO data source and each APO template attribute is mapped to a GIS map layer field, users can search for external APO data by template attribute. |
| SOURCE_AUTH_PWD | Enter the web service authentication user password. | This is the user password for accessing the web service. |
| SOURCE_AUTH_USER | The web service authentication user name. | This is the user name for accessing the web service. |
| SOURCE_ID | A unique ID. | This value identifies the source in the code. |
| SOURCE_LOCATION | InternalExternal | The location option for the external APO source (Internal or External). Internal |

| Standard Choice Value | Value Desc | Description |
|---------------------------|---|--|
| | | indicates that Civic Platform uses the current Civic Platform reference APO as the source. |
| SOURCE_METHOD | Web service | The APO source method to connect to the external source. Civic Platform only supports web service. |
| SOURCE_NAME | Enter the source name. | The name of the external source. |
| SOURCE_URL | The external APO source URL. For example, http://source.url/sur.wsdl. | - |
| WEB_SERVICE_SSL_SUPPORTED | Yes No True False. Default: Yes | This value defines whether the web service needs SSL data transfer. |
| IS_XML_DATA | Yes No Default: No | Specifies whether to use the XML data source. |

EXTERNAL_PARCEL_SOURCE

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

This Standard Choice defines the external parcel source. Agencies can use existing external APO repository information and maintain just one APO repository for all its needs.

Table 86: EXTERNAL_PARCEL_SOURCE Standard Choice Values

| Standard Choice Value | Value Desc | Description |
|----------------------------------|------------|---|
| CAN_CONTAIN_ADDRESSES | Yes, No | This value specifies whether the address information associated with the selected parcel can populate within the application. If you set the value description to Yes, then the Address tab of the reference Parcel detail portlet lists all the addresses related to the parcel. If you set the value description fields for CAN_CONTAIN_ADDRESSES and CAN_CONTAIN_OWNERS to Yes and enable FID 8234 Get Address And Owner, Civic Platform exposes the Get Address & Owner button on the Parcel section of the application intake form. |
| CAN_CONTAIN_OWNERS | Yes, No | This value specifies whether the owner information associated with the selected parcel can populate within the application. If you set the value description to Yes, then the Owner tab of the reference Parcel detail portlet lists all the owners related to the parcel. |
| SOURCE_ATTRIBUTES_MAPPING_ENABLE | Yes, No | This value specifies whether the external APO data source handles the mapping between the parcel template attributes and the GIS map layer fields. When Civic Platform uses GIS as its external APO data source |

| Standard Choice Value | Value Desc | Description |
|---------------------------|---|---|
| | | and each APO template attribute is mapped to a GIS map layer field, users can search for external APO data by template attribute. |
| SOURCE_AUTH_PWD | Enter the web service authentication user password. | This is the user password for accessing the web service. |
| SOURCE_AUTH_USER | The web service authentication user name. | This is the user name for accessing the web service. |
| SOURCE_ID | A unique ID. | This value identifies the source in the code. |
| SOURCE_LOCATION | InternalExternal | The location option for the external APO source (Internal or External). Internal indicates that Civic Platform uses the current Civic Platform reference APO as the source. |
| SOURCE_METHOD | Web service | The APO source method to connect to the external source. Civic Platform only supports web service. |
| SOURCE_NAME | Enter the source name. | The name of the external source. |
| SOURCE_URL | The external APO source URL. For example, http://source.url/sur.wsdl. | |
| WEB_SERVICE_SSL_SUPPORTED | Yes, No, True, False Default: Yes | This value defines whether the web service needs SSL data transfer. |
| IS_XML_DATA | Yes, No Default: No | Specifies whether to use the XML data source. |

You can configure a GIS map layer as external parcel source. Civic Platform can retrieve GIS objects from the map layer as external parcels for users to view or attach to records.

Table 87: Standard Choice Values for GIS Map Layer

| Standard Choice Value | Value Desc | Description |
|-------------------------|----------------|---|
| AUTO_LINK_TO_GIS_OBJECT | Yes | This value "Yes" defines GIS as the external source. |
| SOURCE_MAP_SERVICE_ID | Map Service ID | This value sets the map service that contains the target layer from which you want to retrieve GIS objects as external parcels. |
| SOURCE_MAP_LAYER_ID | Map Layer ID | This value sets the map layer from which you want to retrieve GIS objects as external parcels. |

EXTERNAL_PROVIDER_ADAPTER

Product

Civic Platform

Type

System Switch

Description

This Standard Choice stores the agency customized external provider adapter web service URL.

Standard Choice values can include:

{External exam provider API website. For example, api.exambuilder.com}

Value Desc:

{External exam provider adapter web service URL. For example, `#{av.biz.url}/education/ExamBuilder?wsdl.`}

EXTERNAL_REVIEWERS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice is used for the third party plan review tool. If you have plan reviewers who are not Civic Platform users, configure this standard choice.

1. Before proceeding, ensure that each reviewer has a Citizen Access account.
2. Ensure that the email address used for the reviewer's Citizen Access account is the same as the email address used in the reviewer's third party review tool profile.
3. Note the exact name and email address from the Citizen Access account.
4. Configure the standard choice EXTERNAL_REVIEWERS using the information from step 3.

| Standard Choices Value | Value Description |
|------------------------|-------------------|
| <enter user email> | <enter user name> |

You can find reviewer names added via this standard choice in the list of staff available for task assignment in Civic Platform. External reviewers are listed in the External Users category.

FEE_QUANTITY_ACCURACY

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

This Standard Choice defines the maximum number of digits allowed in the decimal portion of the Quantity. You can set the Standard Choice Value to a number between 2 and 10. For example, if the Standard Choice Value is 10, the maximum number of digits allowed in the decimal portion is 10.

If this Standard Choice is undefined, the Quantity field has 2 decimals.



Note:

The maximum number of total digits allowed in the Quantity field is 14 for positive integers, or 16 for other values.

FILE_UPLOAD_BEHAVIOR

Product

Civic Platform


Type

System Switch

Description

This Standard Choice configures the file upload behavior for attaching documents to a record.

Table 88: FILE_UPLOAD_BEHAVIOR Standard Choice Values

| Value | Applicable Product | Description |
|-----------------|-------------------------------|---|
| Basic {Default} | Civic Platform Citizen Access | This mode requires users to install Silverlight runtime on their computers for file uploading. If you activate this mode, the Windows Open dialog opens for users to select one or multiple files from a single folder to upload files to a record. For illustration, see Figure 11: Upload Files in Basic Mode . |
| Advanced | Civic Platform Citizen Access | This mode requires users to install Silverlight runtime on their computers. If you activate this mode, a Batch Upload or File Upload window opens for users to select files from one or more folders, and then upload the selected files to a record. For illustration, see Figure 12: Upload Files in Advanced Mode . |
| Html5 | Citizen Access | In this mode, users need not install Silverlight runtime for file uploading in Citizen Access, and the upload behavior is the same as in the Basic mode.  Note: Citizen Access applies the Html5 mode if you activate the Html5 mode, no matter whether you activate another mode (Basic/Advanced) or not. |



Note:

If you enable section 508 accessibility mode in Civic Platform and Citizen Access, the file upload behavior is always Basic regardless of the Standard Choice configuration.

When a contract inspector or self-certified inspector uploads inspection results in Citizen Access, the file upload behavior can only be Advanced or Html5. The Html5 mode provides the File Upload window which is similar to the one provided in the Advanced mode but has minor UI differences.

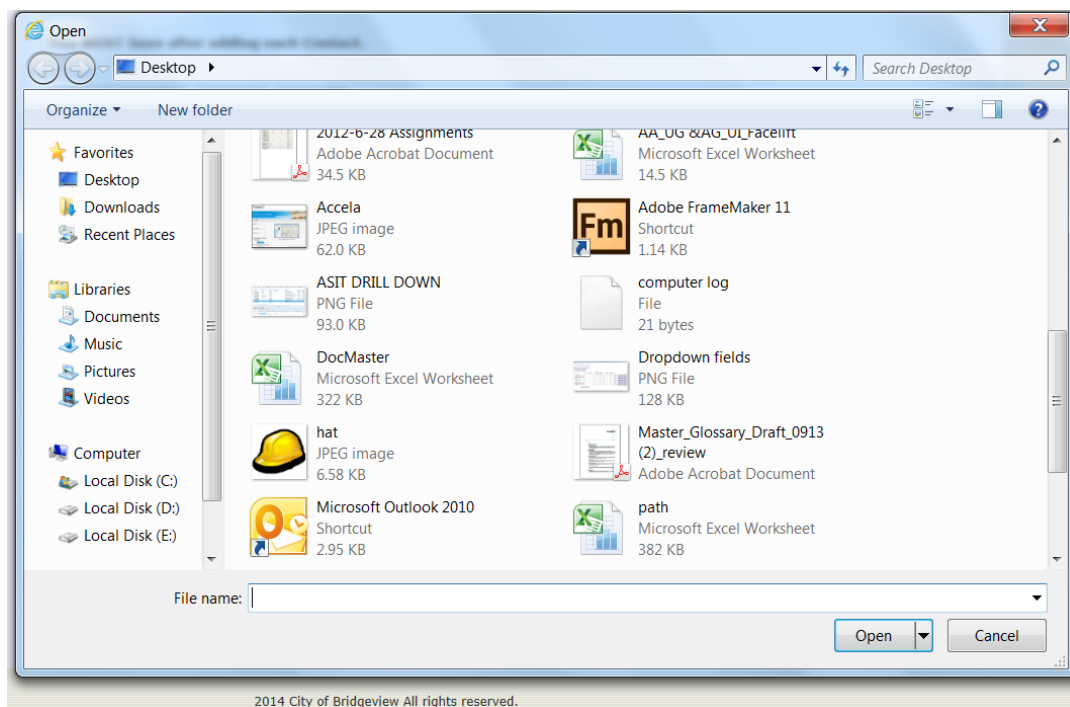


Figure 11: Upload Files in Basic Mode

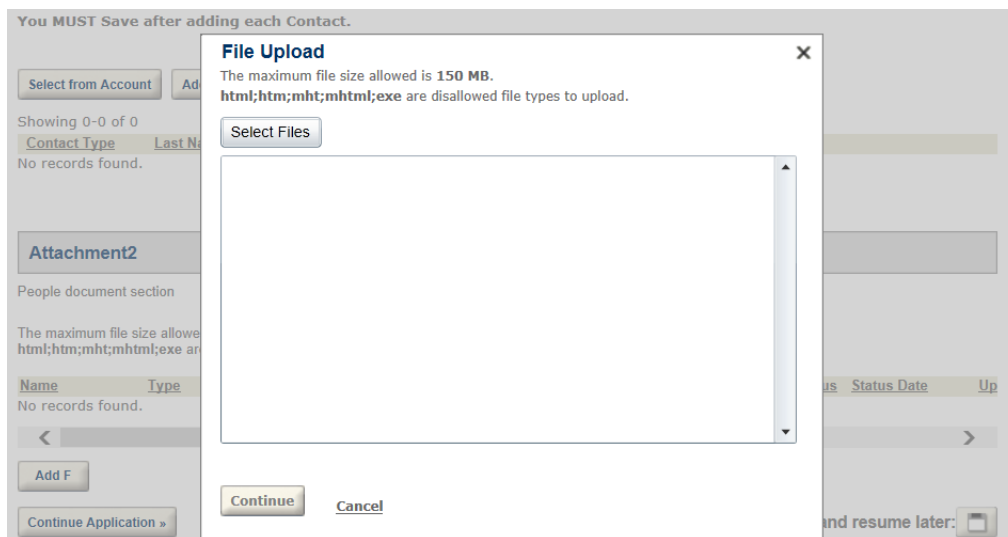


Figure 12: Upload Files in Advanced Mode

FIND APP DATE RANGE

Product

Citizen Access

Type

System Switch

Description

This Standard Choice defines a default date range when public users search for permits.

The Standard Choices value can be:

{Enter a numeric value that represents the number of days between the search start date and the end date (the current date). For example, enter 365 if you want the default date range to be 1 year ago till now.}

FIND_TIME_ACCOUNTING_LOGGED_DATE_RANGE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice configures the default Logged From date in the time accounting search portlet. The default Logged To date is the current date.

The screenshot shows a search interface titled "Time Accounting: Search". It includes a menu, submit, reset, cancel, and help buttons. The search criteria are organized into three columns:

- Column 1:** User ID (Current User), ADMIN, Usage (dropdown), Logged Date (From: 02/10/2013, To: 02/25/2013), Time Accounting Type.
- Column 2:** User Group Name, Lock Status (dropdown), Entered Date (From: , To:).
- Column 3:** Record Type, Billable (dropdown), Record ID.

The "Logged Date" section is highlighted with a red box, indicating the focus of the standard choice.

Standard Choice value can include:

{A historical date}. Please use your best judgment to define a date for users to get a realistic set of search results.

{A number}. Civic Platform subtracts the defined number of days from the current date to get the default Logged From date.

If the Standard Choice is undefined, the default Logged From Date is one week before the current date (the default Logged To date).

FISCAL_YEAR_START

Product

Civic Platform

Type

System Switch

Description

This Standard Choice specifies that the sequence number generator uses the fiscal year instead of calendar year to generate numbering.

Standard Choice value is:

MONTH

Value Description:

{The number for the value MONTH. For example, if the Value Desc is 7 then July is the start of the fiscal year.}

FOOD_FACILITY_INSPECTION

Product

Citizen Access

Type

System Switch

Description

This Standard Choice controls the food facility search functionality in Citizen Access.

Table 89: FOOD_FACILITY_INSPECTION Standard Choice Values

| Standard Choice Values | Value Desc | Description |
|--|---|--|
| RELATED_LICENSE_TYPES | Enter the license types in the value description, separated with a comma. | Identifies the license types used for the food facility |
| PREVIOUS_INSPECTION_DISPLAY_TOTAL_NUMBER | Enter a number. | Sets the number of most recent inspections allowed for display in the Food Facility Details page. |
| PREVIOUS_INSPECTION_DISPLAY_LAST_DAYS | Enter a number. | <p>Sets a number of days counted backwards from the current date, excluding the dates on which no inspection is given result.</p> <p>Citizen Access displays the inspections that have results on any one of the defined number of days in the Previous Inspection section of the food facility license. For example, set “3” to the Value Description for this Standard Choice Value, and the current date is 1/2/2012.</p> <p>For a food facility license, it has no inspection resulted on the current day. Its last three inspection-resulting days are 1/1/2012, 1/7/2011, and 1/1/2011.</p> <p>The inspections of which the Result Date is one of these three days is displayed in the Previous Inspection section of that food facility license in Citizen Access.</p> <p>The setting is for global use by the food facility licenses as default value. Agency users can specify a different number for a particular food facility license in the “Display Inspection in the past # of Days” field in the license Detail portlet in Civic Platform.</p> |
| THE_MOST_INSPECTION_DELAY_DAYS | Enter a number. | Sets a number of days counted forwards from the inspections result date. You can display inspections only after the configured number of days. For example, if you set the value description to 5 (days after the result date) and an inspection result occurs on November 12, then you can display the inspection from November 17. |

FULL_PAY_ALLOCATION_OPTIONS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines the allocation method of the full pay functionality which allocates the payment amount in sequence until the applied payment goes to zero.

The Full Pay button reallocates amounts in the Apply Credits and Apply Payments fields based on the Standard Choice settings.

Determines payment options for the Apply Payment page.

Standard Choice values can include:

Automatic. Civic Platform processes the payment in the order of fee item priority. If you set this Standard Choice value, you must set the priority of the fee items in Civic Platform.

Standard. Civic Platform processes the payment in the order of outstanding fees, which starts with the first on the list.

GENDER

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice allows users to define the gender for contacts and licensed professionals.

Standard Choice values may include:

F - Female

M - Male

GIS_ATTACHMENT_SELECTION

Product

Civic Platform, GIS

Type

System Switch

Description

This Standard Choice defines user notification when GIS objects attach to a record. The two options indicate whether all GIS objects attach without a prompt to the user or if the system provides a selection page prompt.

Standard Choice values can include:

All

User Selection

GIS_BUFFER_DISTANCE

Product

Civic Platform, GIS

Type

System Switch

Description

This Standard Choice sets buffer distance for Civic Platform to artificially shrink a parcel that overlays multiple GIS objects, when mapping the parcel attribute in the GIS map to an ASI field, or when auto assigning inspectors to records that deal with the parcel but have no inspection district information. With the buffer distance setting, users no longer need to select to which GIS object to map the parcel.

Table 90: GIS_BUFFER_DISTANCE Standard Choice Values

| Standard Choice Values | Value Description | Description |
|---|---|--|
| APO_ASI_ATTRIBUTE_ POPULATION_BUFFER | Enter any numeric value (-0.1, 0.2, 0, etc.) Default: -0.1 | This value defines the distance by which Civic Platform artificially shrinks a parcel when mapping the parcel attribute in the GIS map to an ASI field. The Value Desc must be negative (for example, -0.1) for shrinking parcels. If the Value Desc is 0, Civic Platform does not change the parcel border. If the Value Desc is positive, Civic Platform artificially stretches the parcels. The measurement unit of the value is the same as used in the GIS map. |
| INSPECTION_AUTO_ ASSIGN_BUFFER | Enter any numeric value (-0.1, 0.2, 0, etc.) Default: -0.1 | This value defines the distance by which Civic Platform artificially shrinks a parcel when auto assigning inspectors for records that deal with the parcel but have no inspection district information. The Value Desc must be negative (for example, -0.1) for shrinking parcels. If the Value Desc is 0, Civic Platform does not change the parcel border. If the Value Desc is positive, Civic Platform artificially stretches the parcels. The measurement unit of the value is the same as used in the GIS map. |

GIS_NEARBY_QUERY_LIMITATION

Product

GIS

Type

System Switch

Description

This Standard Choice sets various limits on the Nearby Query functionality, for example, the maximum number of features that users can select to perform a nearby query. Proper limits can prevent performance issues when users select too many GIS objects or meaningless data to perform a nearby query.

Civic Platform has set default limits but you can use this Standard Choice to change the limits according to your agency's specific requirements.

Table 91: GIS_NEARBY_QUERY_LIMITATION Standard Choice Values

| Standard Choice Value | Value Desc | Description |
|---------------------------------------|---|---|
| GIS_NEARBY_INPUT_FEATURES_LIMIT | Enter a numeric value. For example, 10. | This value defines the maximum number of features that users can select to perform a nearby query. If you do not define this Standard Choice value, Civic Platform sets the limit to 10 by default. |
| GIS_NEARBY_SEARCH_AREA_LIMIT_SQKM | Enter a numeric value. For example, 700. | This value defines the maximum map extent within which users can perform a nearby query. The measurement unit is square kilometer. If you do not define this Standard Choice value, Civic Platform sets the limit to 700 square kilometers by default. |
| GIS_NEARBY_INPUT_FEATURE_COORDS_LIMIT | Enter a numeric value. For example, 2000. | When users select a complex GIS object or multiple GIS objects to perform a nearby query, the selection may contain multiple coordinate pairs. This Standard Choice value defines the maximum number of coordinate pairs that the selection contains. If you do not define this Standard Choice value, Civic Platform sets the limit to 2,000 pairs by default. |
| GIS_NEARBY_DISTANCE_LIMIT_METERS | Enter a numeric value. For example, 10000 | This value defines the maximum search radius that users can specify to perform a nearby query. The measurement unit is meter. If you do not define this Standard Choice value, Civic Platform sets the limit to 10,000 meters by default. |

GIS_PROX_ALERT_TRIGGERS

Product

GIS

Type

System Switch

Description

You must configure this Standard Choice for proximity alerts to function.

Standard Choice values can include:

Within distance of

Value Desc:

{Enter a numeric value that represents the distance.}

GLOBAL_SEARCH_BUILD_INDEX_ENTITIES

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the objects for which the global search batch job builds the index server.

Standard Choice values can include:

CAP
ADDRESS
LP
ASSET
PARCEL
DOCUMENT
CONTACT

GLOBAL_SEARCH_MAX_COUNT

Product

Civic Platform

Type

System Switch

Description

This Standard Choice sets the maximum number of results returned in a global search. The default value is 10000.

GLOBAL_TRUST_ACCOUNT

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the global trust account ID and the module to which it is applicable. If a user tries to process a refund, and chooses Trust Account as the method, then the global trust account for the module to which the current record belongs displays by default.

Agencies can assign one or more global trust accounts as global to Civic Platform users. If a trust account is global, then it is available to all records within one or more modules.

If a user selects a defined global trust account and a primary trust account for a record, then the primary trust account is the default trust account.

Standard Choices Item - Edit

Use this form to set up a Standard Choices Item.

Standard Choices Item Name: GLOBAL_TRUST_ACCOUNT

Description: (250 char max)

Status: Enable Disable

Type: System Switch Shared drop-down ENSE

| Standard Choices Value | Value Desc | Active |
|------------------------|-----------------|--|
| 008-APP-986935 | Building Permit | <input checked="" type="checkbox"/> Delete |

[Update](#) [Add](#) [Cancel](#)

Standard Choice values can include:

{Enter the trust account ID. For example, 2011-TrustAccount-000.}

Value Desc:

{Enter the module for which the global trust account is applicable.}

Building

All

If a global trust account is applicable to all (modules) and also a specific module (Building, for example), the trust account for the specific module takes precedence (has a higher priority).

GRACE_PERIOD_INTERVAL_UNITS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the value options for the time unit to be used for the Grace Period Interval.

Standard Choice values can include:

Days

Months

Years

HEARING BODY

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the value options for the hearing bodies drop-down list. Users can update this list from either the Standard Choices or Hearing Bodies.

Standard Choice values can include:

Board of Appeals

City Council

Planning Commission

Zoning Administrator

HEARING LOCATION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines the venues where you can conduct hearings, such as a city hall or a county administration building.

The values you enter for this Standard Choice populate the Location drop-down list. Agency users can access this drop-down list from the Hearing Calendar list portlet under the Item secondary tab.

Standard Choice values can include:

{Enter up to 40 characters for each hearing location.}

City Council Chamber

City Hall Main Room

County Administration Building

Civic Auditorium

HEARING MAX TIME

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines the length (in minutes) of hearings. For example, you might want to measure hearing times in fifteen minute increments: 15, 30, 45, 60, 75, and 90.

The values you enter for this Standard Choice populate the Duration drop-down list. Agency users can access this drop-down list from the Hearing Calendar list portlet under the Item secondary tab. You can enter up to four characters for each Standard Choice value.

Standard Choice values can include:

{Enter a number. Unit: minute.}

10

30

I18N_ADDRESS_FORMAT

Product

Civic Platform, Citizen Access, GIS, and Mobile Office

Type

System Switch

Description

This Standard Choice allows users to define the format for addresses.



Note:

Every time when updating the value description, you must rebuild the index for all the Civic Platform objects that are related to addresses.

Table 92: I18N_ADDRESS_FORMAT Standard Choice Values

| Standard Choice Values | Value Description | Description |
|-------------------------|---|---|
| STANDARD_ADDRESS_FORMAT | Enter the corresponding parameters listed in Table 94 : | This value determines how to concatenate address fields in Civic Platform, GIS, and |


| Standard Choice Values | Value Description | Description |
|---------------------------|---|---|
| | <p>Address Parameters and the Corresponding Fields to define the address concatenation. The parameters shall be separated with commas "," or hyphens "-". No extra space is allowed. For example, enter "\$\$StreetType\$\$,\$\$UnitType\$\$". If a parameter does not have any value, the comma or hyphen after the parameter will not show in the address concatenation.</p> | <p>Mobile Office. The configured concatenated address displays everywhere a full address is shown. If you do not define this Standard Choice value, then the full address uses a default concatenation of fields, which varies among different products:</p> <ul style="list-style-type: none"> In Civic Platform, the full address is comprised of the following fields in listed order: Street # (start), Start Fraction, Street # (end), End Fraction, Direction, Street Name, Street Type, Street Suffix (Direction), Unit Type, Unit # (start), Unit # (end), County, State, and Zip Code. In GIS, the full address is comprised of the following fields in listed order: Street Number, Fraction, Direction, Street Name, Street Type, Unit Type, Unit, City, State, Country, and Zip Code. In Mobile Office, the full address is comprised of the following fields in listed order: Street Number, Fraction, Street Prefix, Street Name, Street Type, Street Suffix, Unit, and Unit Type. |
| LONG_ADDRESS_NO_FORMAT | <p>Define the address patterns with the parameters listed in the Table 94: Address Parameters and the Corresponding Fields. You can modify the patterns to meet your agency's needs, and can also insert the HTML code into the patterns to define, such as, font and color. Below is an example of defining an address pattern: <code>\$HouseNumberStart\$\$\$\$Direction\$ \$\$\$StreetName\$\$ \$\$StreetType\$\$,\$\$UnitType \$\$\$UnitStart\$\$,\$\$City\$\$\$ \$State\$\$\$\$Zip\$\$\$\$Country\$\$,\$ \$AddressType\$\$</code></p> | <p>These values are four address patterns which apply to different sections and forms in Citizen Access. To get an exhaustive list of sections and forms and their assigned address pattern, see Table 93: Scope of The Address Format Control.</p> |
| LONG_ADDRESS_WITH_FORMAT | | |
| SHORT_ADDRESS_NO_FORMAT | | |
| SHORT_ADDRESS_With_FORMAT | | |



Table 93: Scope of The Address Format Control

| Pages | Section/Form | Address Format |
|------------------------------|----------------------------------|---------------------------|
| Look Up property Information | Look Up by Address | SHORT_ADDRESS_NO_FORMAT |
| Look Up property Information | Look Up by parcel | SHORT_ADDRESS_NO_FORMAT |
| Look Up property Information | Look Up by Owner | SHORT_ADDRESS_NO_FORMAT |
| Address Detail | Address Summary | SHORT_ADDRESS_WITH_FORMAT |
| Parcel Detail | Address section | SHORT_ADDRESS_NO_FORMAT |
| Owner Detail | Address section | SHORT_ADDRESS_NO_FORMAT |
| Application intake form | Address search result list | LONG_ADDRESS_NO_FORMAT |
| Application intake form | Address auto-fill drop-down list | SHORT_ADDRESS_NO_FORMAT |
| Application intake form | Parcel search result list | SHORT_ADDRESS_NO_FORMAT |

| Pages | Section/Form | Address Format |
|---------------------------------|----------------------------|--------------------------|
| Application intake form | Owner search result list | SHORT_ADDRESS_NO_FORMAT |
| Review page | Address Summary | LONG_ADDRESS_WITH_FORMAT |
| Record Detail | Address Summary | LONG_ADDRESS_WITH_FORMAT |
| Search by Address | Address search result list | LONG_ADDRESS_NO_FORMAT |
| Record Home | Record list | SHORT_ADDRESS_NO_FORMAT |
| Collection Detail | Record list | SHORT_ADDRESS_NO_FORMAT |
| Enter Work Location | Address search result list | LONG_ADDRESS_NO_FORMAT |
| Cart management | Address Summary | SHORT_ADDRESS_NO_FORMAT |
| Receipt | Address Summary | SHORT_ADDRESS_NO_FORMAT |
| Search for Licensee | Record list | SHORT_ADDRESS_NO_FORMAT |
| Show Record Dialog page | Parcel list | SHORT_ADDRESS_NO_FORMAT |
| Show Record Dialog page | Record list | SHORT_ADDRESS_NO_FORMAT |
| Trust Account Detail page | Associate Address Summary | LONG_ADDRESS_NO_FORMAT |
| Trust Account Detail page | Associate Parcel list | SHORT_ADDRESS_NO_FORMAT |
| Inspection Location and Contact | Location | LONG_ADDRESS_WITH_FORMAT |

Table 94: Address Parameters and the Corresponding Fields

| Parameter | Field |
|----------------------------|--|
| \$\$HouseNumberStart\$\$ | Street # (start) |
| \$\$Street#(end)\$\$ | Street # (end) |
| \$\$Direction\$\$ | Direction |
| \$\$StreetName\$\$ | Street Name |
| \$\$StreetType\$\$ | Street Type |
| \$\$UnitType\$\$ | Unit Type |
| \$\$UnitStart\$\$ | Unit # (start) |
| \$\$City\$\$ | City |
| \$\$State\$\$ | State |
| \$\$Zip\$\$ | Zip Code |
| \$\$InspectionDistrict\$\$ | Inspection District |
| \$\$Country\$\$ | Country |
| \$\$StartFraction\$\$ | Start Fraction |
| \$\$EndFraction\$\$ | End Fraction |
| \$\$Prefix\$\$ | Prefix |
| \$\$StreetSuffix\$\$ | Street Suffix |
| |  Note: Only use this parameter for the following Standard Choice values: <ul style="list-style-type: none"> • LONG_ADDRESS_NO_FORMAT • LONG_ADDRESS_WITH_FORMAT • SHORT_ADDRESS_NO_FORMAT • SHORT_ADDRESS_WITH_FORMAT |
| \$\$Unit#(end)\$\$ | Unit # (end) |

| Parameter | Field |
|----------------------------------|--|
| \$\$SecondaryRoad\$\$ | Secondary Road |
| \$\$SecondaryRoadNumber\$\$ | Secondary Road Number |
| \$\$NeighborhoodPrefix\$\$ | Neighborhood Prefix |
| \$\$Neighborhood\$\$ | Neighborhood |
| \$\$Description\$\$ | Description |
| \$\$Distance\$\$ | Distance |
| \$\$XCoordinator\$\$ | X Coordinate |
| \$\$YCoordinator\$\$ | Y Coordinate |
| \$\$InspectionDistrictPrefix\$\$ | Inspection District Prefix |
| \$\$County\$\$ | County |
| \$\$StreetAddress\$\$ | Street Address |
| \$\$AddressLine1\$\$ | Address Line 1 |
| \$\$HouseNumberAlphaStart\$\$ | House # Alpha (start) |
| \$\$HouseNumberAlphaEnd\$\$ | House # Alpha (end) |
| \$\$LevelNumberStart\$\$ | Level # (start) |
| \$\$LevelNumberEnd\$\$ | Level # (end) |
| \$\$LevelPrefix\$\$ | Level Prefix |
| \$\$AddressTypeFlag\$\$ | Address Type Flag  Note: Only use this parameter for the Standard Choice value STANDARD_ADDRESS_FORMAT. |
| \$\$AddressLine2\$\$ | Address Line 2 |
| \$\$AddressType\$\$ | Address Type  Note: Only use this parameter for the following Standard Choice values: <ul style="list-style-type: none"> LONG_ADDRESS_NO_FORMAT LONG_ADDRESS_WITH_FORMAT SHORT_ADDRESS_NO_FORMAT SHORT_ADDRESS_WITH_FORMAT |

I18N_SETTINGS

Product

Civic Platform, Citizen Access

Type


System Switch

Description

Configure this Standard Choice to enable all internationalization and localization features and manually define currency and date formats in Civic Platform and Citizen Access.

Follow the steps in [For Multiple Languages](#) to set values for English and additional languages.

Table 95: I18N_SETTINGS Standard Choice Values

| Standard Choice Values | Value Description | Description |
|------------------------|--|--|
| I18N_DEFAULT_LANGUAGE | Read-only | Once you set up internationalization and localization in the multi-agency configuration, the language you select for the Default Language field is automatically populated here. |
| I18N_SECOND_LANGUAGE | Enter one of these values: ar_AE (Arabic) en_AU (Australian English) en_US (US English) | This value defines the second language for the agency. If you set up a second language, the WorkflowTask Detail portlet in Civic Platform displays two Comments fields: one is in the primary language and the other in the second language. Citizen Access (ACA) users can see the Comments field in the language they choose from the Citizen Access Login page if Civic Platform supports this language. |
| CURRENCY_LOCALE | Enter one of these values following the format in I18N_DEFAULT_LANGUAGE Value Desc: ar_AE (for Arabic), en_AU (for Australian English), en_US (for US English), es_MX (for Mexico Spanish), and zh_TW (for Traditional Chinese). | This value defines the currency for the agency no matter which language a user selects when he logs in. For example, the en_US value represents the dollar currency used in the United States; the ar_AE value represents the dirham currency used in the United Arab Emirates. You can set the default language value to a different value than the currency local. For example, you can set the default language to es_MX, but set the currency locale as en_US. That means Spanish is the additional language, but the US Dollar (\$) is the currency symbol. |
| DATE_FORMAT | MM/dd/yyyy (default)yyyy/MM/dd. dd/mm/yyyy. | This value specifies the date format for the I18N_DEFAULT_LANGUAGE value. NOTE: If an agency is providing multiple language support and you need to define this date format, yyyy/MM/dd, for your additional language, see For Multiple Languages . |
| DATE_TIME_FORMAT | MM/dd/yyyy HH:mm:ss yyyy/MM/ dd HH:mm:ss. | This value defines how the date and time format can display. The MM/dd/yyyy represents the Month/day/year, and the HH:mm:ss represents the Hours:minutes:seconds. For example, July 26, 2011 at 6:20:16 a.m. could be formatted to 07/26/2011 06:28:16.  Note: If an agency is providing multiple language support and you need to define this date format, yyyy/MM/dd, for your additional language then see For Multiple Languages . |
| TIME_FORMAT | Enter the time in one of these four patterns: HH:mm:ss tt, HH:mm tt, HH:mm, or HH:mm:ss. For example, HH:mm:ss tt represents Hours:minutes:seconds AM(or PM). | This value specifies the time format for the agency, except that the inspection functionality uses the format defined in INSPECTION_TIME_FORMAT. |
| INSPECTION_TIME_FORMAT | Enter the time in one of these four patterns: HH:mm:ss tt, HH:mm tt, HH:mm, or HH:mm:ss. For | This value defines the time format for the inspection functionality only. |

| Standard Choice Values | Value Description | Description |
|-------------------------------|--|--|
| | example, HH:mm:ss tt represents Hours:minutes:seconds AM(or PM). | |
| MULTI-LANGUAGE SUPPORT ENABLE | This Value Desc is read-only. Yes, No | When you configure internationalization in the multi-agency configuration for Civic Platform and Citizen Access, the value is automatically filled with the "Yes" or "No" value. Yes enables multiple language support. No disables multiple language support. |
| HIDE_LANGUAGE_OPTIONS | Yes, No | This value is only for the Civic Platform login page. To hide the Language drop-down list option, enter Yes in the Value Desc field. To display the Language drop-down list option at login, enter No in the field. |

For Multiple Languages

Only DATE_FORMAT and DATE_TIME_FORMAT and support this alternate value in an additional language. If an agency is providing multiple language support and you need to define this date format, yyyy/MM/dd, for your additional language, then you must follow these unique steps. For example, if English is your primary language and Chinese is the additional language, follow these steps:

1. Configure for English all of the [I18N_SETTINGS](#) values and Submit.
The I18N_SETTINGS page saves the values in English.
2. In the Language drop-down list, switch to Chinese, for example, switch to Chinese. If Chinese is not yet available in the drop-down list, then you need complete setting up I18N_SETTINGS and return to these steps.
The I18N_SETTINGS page refreshes and displays the values you set in English. But, the page is available for you to enter Values for DATE_FORMAT and DATE_TIME_FORMAT.
3. Enter the alternate supported Values of yyyy/MM/dd for both the DATE_FORMAT and DATE_TIME_FORMAT and click Submit to save the values for Chinese.



Note:

The yyyy/MM/dd is the only other supported date format.

4. Switch the Language back to English from the drop-down list and notice that the DATE_FORMAT is different than what you set for Chinese.

INDIVIDUAL_CONTACT_MATCH_CRITERIA

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

To enable close-match searching, configure the following standard choices in the Standard Choices portlet in the Setup Admin ([Editing Standard Choices in the Setup Admin](#)):

- ENABLE_CONTACT_ADDRESS

- INDIVIDUAL_CONTACT_MATCH_CRITERIA
- ORGANIZATION_CONTACT_MATCH_CRITERIA

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.

Standard Choices: INDIVIDUAL_CONTACT_MATCH_CRITERIA

Submit New Delete Help

Standard Choices Item Name: INDIVIDUAL_CONTACT_MATCH_CRITERIA

Description: (250 char max) Configure the close match criteria used to identify an individual contact.


Status: Enable Disable

Type: System Switch Shared drop-down EMSE Business Configuration

You can add 10 contact fields in one criteria row at most.
Contacts are close matches if they match all the fields in a criteria row.

| Criteria * | Priority | Active |
|---|----------|-------------------------------------|
| <input type="checkbox"/> First Name;Full Name;Last Name;Middle Name;SSN | 1 | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> E-mail;First Name;Gender;Race | 2 | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> First Name;Gender;Race;Telephone | 3 | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Birth Date;Birthplace City;Birthplace Country/Region;Birthplace State;Country/Region;F | 4 | <input checked="" type="checkbox"/> |

Table 96: INDIVIDUAL_CONTACT_MATCH_CRITERIA Standard Choice Values

| Value | Description |
|----------|--|
| Criteria | Click the picker to select the contact fields as the matching criteria. If you select multiple fields in one row, the system joins the fields by a logical AND. The system joins criteria in different rows by a logical OR.  Note: Civic Platform searches for close matches based on the criteria rows in which every field has value, and disregards the criteria rows in which any field has no value. |
| Priority | The priority determines the order of the matches found:Close matching contacts that meet the criteria of a higher priority always display before those that meet the criteria of a lower priority.In cases when only one match is necessary for subsequent processing, the close matching contact that meets the criteria of the highest priority is the default one that Civic Platform uses. |
| Active | Mark the check box to include this item on the list of Standard Choices. |

INSPECTION_CATEGORY

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines inspection type categories. You can assign an inspection type to one category or multiple categories.

The values you enter for this Standard Choice populate the Inspection Edit - Category List window.

INSPECTION_DISTRICT_ON_PARCEL

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines whether the Inspection District field displays on parcel pages. If the Standard Choice is inactive, or its value is No, the field does not display on parcel pages.

Standard Choice values can include:

Yes

No

INSPECTION_RESULT_CSV_FORMAT

Product

Civic Platform and Citizen Access

Type

System Switch

Description

This Standard Choice defines the format of an inspection result CSV file. The Standard Choice value specifies the columns in the CSV file. Make sure you enter the value exactly as [Table 97: INSPECTION_RESULT_CSV_FORMAT Standard Choice Values](#) listed.

The value description defines attributes for a given column. Use any of the following attributes and separate attributes with semicolons (;).

- **COLUMN=<Column Heading>**. Replace the attribute value with the actual column heading that you want.
- **REQUIRED=Y**. Add this attribute if you require inspectors to enter information in the given column.
- **TYPE=<Type of Column Value>**. To require inspectors to enter a specific type of value in the given column, add this attribute and set the attribute value to Date, Number, or Integer.
- **FORMAT=<Date Format>**. Replace the attribute value with the actual format of the date and time. For a list of attribute values that you can enter, see [Table 98: Supported Date and Time Formats](#). For a description of format specifiers, see [Table 99: Date and Time Format Specifiers](#).
- **ORDER=<Integer>**. Add this attribute to define the order of columns in a list.



Note:

If you do not enable or define the Standard Choice for your agency, Citizen Access applies the default CSV format as [Table 97: INSPECTION_RESULT_CSV_FORMAT Standard Choice Values](#) defines.

Table 97: INSPECTION_RESULT_CSV_FORMAT Standard Choice Values

| Standard Choice Value | Example Value Description |
|----------------------------|---|
| ADDRESS | COLUMN=Address |
| INSPECTION CONTACT NAME | COLUMN=Contact Name |
| INSPECTION CONTACT PHONE | COLUMN=Contact Phone |
| INSPECTION DATE | COLUMN=Inspection Date *; TYPE=Date; FORMAT=MM/dd/yyyy;REQUIRED=Y |
| GRADE | COLUMN=Inspection Grade |
| INSPECTION SEQUENCE NUMBER | COLUMN=Inspection ID*; Type=NUMBER;REQUIRED=Y |
| REQUEST COMMENT | COLUMN=Request Comments |
| RESULT COMMENT | COLUMN=Result Comments |
| SCHEDULED DATE | COLUMN=Inspection Schedule Date; TYPE=Date; FORMAT=MM/dd/yyyy |
| SCORE | COLUMN=Score; TYPE=INTEGER |
| STATUS | COLUMN=Status *;REQUIRED=Y |
| INSPECTION TYPE | COLUMN=Inspection Type |
| ALTERNATIVE ID | COLUMN=Permit ID *;REQUIRED=Y |

Table 98: Supported Date and Time Formats

| Supported Format | Example Date and Time |
|------------------------|---|
| yyyy-MM-dd hh:mm:ss aa | 2013-9-11 11:26:30 am 2013-9-11 11:26:30 pm |
| yyyy-MM-dd HH:mm:ss | 2013-9-11 11:20:302013-9-11 20:18:59 |
| MM/dd/yyyy hh:mm:ss aa | 09/11/2013 11:26:30 am 09/11/2013 11:26:30 pm |
| MM/dd/yyyy HH:mm:ss | 09/11/2013 11:26:3009/11/2013 21:26:30 |
| dd/MM/yyyy | 11/09/2013 |
| yyyy/MM/dd | 2013/09/11 |
| dd-MM-yyyy | 11-09-2013 |
| MM-dd-yyyy | 09-11-2013 |

Table 99: Date and Time Format Specifiers

| Format Specifier | Description |
|------------------|-------------------------|
| yyyy | Year |
| MM | Month |
| dd | Date of month |
| HH | Hour in a 24-hour clock |
| hh | Hour in a 12-hour clock |
| mm | Minute |
| ss | Second |
| aa | AM/PM |

INSPECTION_ROUTE_TYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the routing types that users can select to optimize the inspection route. The Standard Choice values populate the Order By drop-down menu on the Inspection Route Sheet portlet in Civic Platform. The values also populate the Default Route Type drop-down list on the User - Information page in Civic Platform Classic. For a list of supported routing types, see [Table 100: INSPECTION_ROUTE_TYPE Standard Choice Values](#).

Table 100: INSPECTION_ROUTE_TYPE Standard Choice Values

| Standard Choice Value | Description |
|-----------------------|--|
| Driving | When you add this value, the drop-down menu activated by the Order By button displays the Order by Driving option and the Default Route Type drop-down list on the User - Information page displays the Driving option. |
| Walking | When you add this value, the drop-down menu activated by the Order By button displays the Order by Walking option and the Default Route Type drop-down list on the User - Information page displays the Walking option. |
| Transit | When you add this value, the drop-down menu activated by the Order By button displays the Order by Public Transit option and the Default Route Type drop-down list on the User - Information page displays the Transit option. |

INSPECTION_SETTING

Product

Civic Platform, Citizen Access, Mobile Office


Type

System Switch

Description

This Standard Choice defines common settings for inspections.

Table 101: INSPECTION_SETTING Standard Choice Values

| Standard Choice Values | Value Description | Description |
|--------------------------|-------------------|---|
| UNLIMITED_COMMENT_LENGTH | Yes, No | <p>If you set the value to Yes, users can enter an unlimited number of characters in the Result Comment and Request Comment fields when scheduling or resulting an inspection. Otherwise, Civic Platform limits users to enter a maximum of 4000 characters.</p> <p> Note: If you change the value from Yes to No, the comment that users entered when the value was Yes can still display in full (even if it exceeds 4000 characters).</p> |
| ENABLE_ROUTE_OPTIMIZED | YesNo | <p>If you set the value to Yes, the Start Location, End Location, and Default Route Type fields are available on the User - Information page in Civic Platform Classic. Otherwise, those fields are not available.</p> |

| Standard Choice Values | Value Description | Description |
|------------------------|-------------------|---|
| ENABLE_CALCULATE_SCORE | Yes (default)No | <p>The value controls whether Civic Platform automatically calculates an inspection score using the checklist scores and updates the inspection status according to the score.</p> <p>If you set the value to Yes, Civic Platform automatically calculates inspection scores using the inspection checklist scores for uncompleted inspections.</p> <p>If users change the status of an inspection to pending, Civic Platform automatically clears the status on the inspection detail form, or sets the status according to the auto-calculated inspection score. Different from the inspection detail form, the inspection list portlet displays the status that users specify for the inspection.</p> <p>If users change the status of an inspection to a status of the approved or denied type, Civic Platform keeps the new status.</p> <p>If you set the value to No, Civic Platform does not automatically calculate inspection scores using the inspection checklist scores for uncompleted inspections.</p> <p>When users change the status of an inspection on the inspection detail form, Civic Platform does not automatically calculate the inspection score and keeps the new status on the inspection detail form. If the event InspectionResultModifyAfter is triggered at the submittal, Civic Platform passes the status to the InspectionResult event parameter.</p> |

INSPECTION_UNIT_NUMBER_VALUES

Product

Civic Platform

Type

System Switch

Description

This Standard Choice, together with [INSPECTIONS_BY_UNIT](#), allows users to specify inspection unit number (IUN) for scheduling inspections and displaying inspection results of the same type multiple times for the same record, such as a single record for an apartment building.

If [INSPECTIONS_BY_UNIT](#) defines the IUN field as be a list of options (with the value SELECTLIST), this Standard Choice defines the value options (up to 1000 options) for the IUN list.

Standard Choice values can include:

{Enter the IUN value option in each value entry.}

C18

133A

2432

**Note:**

You can enable and disable the Inspection Unit Number (IUN) function with FID 0225 and [8300-Inspections by Unit Number](#). The default setting is disabled.

INSPECTIONS_BY_UNIT

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the IUN field type. Choices are either free text entry (TEXTBOX) or a list of options (SELECTLIST). The default setting is to use a list of options (SELECTLIST), with which you shall define the value options in [INSPECTION_UNIT_NUMBER_VALUES](#).

Standard Choice values can include:

TEXTBOX

SELECTLIST

INSPECTOR_AUTO_ASSIGN_CRITERIA

Product

Civic Platform, Citizen Access, IVR

Type

System Switch

Description

This Standard Choice defines the criteria for auto-assigning inspections in Civic Platform, Citizen Access, and IVR. Configure this Standard Choice to prevent inspections from being auto-assigned if no inspector is available with the appropriate discipline or in the appropriate district.

Table 102: INSPECTOR_AUTO_ASSIGN_CRITERIA Standard Choice Values

| Standard Choice Values | Value | Description |
|------------------------|-------|--|
| DISCIPLINEDISTRICT | Y/N | <p>DISCIPLINE = Y, DISTRICT = Y. When you set both DISCIPLINE and DISTRICT to Yes, Civic Platform must find an available inspector with the appropriate discipline AND within the appropriate district to auto-assign the inspection. If Civic Platform cannot find an inspector who matches both discipline and district, it does not auto-assign the inspection.</p> <p>DISCIPLINE = Y, DISTRICT = N. When you set DISCIPLINE to Yes and DISTRICT to No, Civic Platform first searches for an available inspector with the appropriate discipline AND within the appropriate district to auto-assign the inspection. If Civic Platform cannot find an inspector who matches both discipline and district, it then searches for an available inspector with the appropriate discipline. If Civic Platform cannot find an inspector with the appropriate discipline, it does not auto-assign the inspection.</p> <p>DISCIPLINE = N, DISTRICT = Y. When you set DISCIPLINE to No and DISTRICT to Yes, Civic Platform first searches for an available inspector with the appropriate discipline AND within the appropriate</p> |

| Standard Choice Values | Value | Description |
|------------------------|-------|--|
| | | <p>district to auto-assign the inspection. If Civic Platform cannot find an inspector who matches both discipline and district, it then searches for an available inspector in the appropriate district. If Civic Platform cannot find an inspector in the appropriate district, it does not auto-assign the inspection.</p> <p>DISCIPLINE = N, DISTRICT = N. When you set both DISCIPLINE and DISTRICT to No, Civic Platform first searches for an available inspector with the appropriate discipline AND within the appropriate district to auto-assign the inspection. If Civic Platform cannot find an inspector who matches both discipline and district, it then searches for an available inspector with the appropriate discipline. If Civic Platform cannot find an inspector with the appropriate discipline, it then searches for an available inspector in the appropriate district. If Civic Platform cannot find an inspector in the appropriate district, it auto-assigns the inspection based on inspectors with the lowest workload or with calendar availability.</p> |

INSPECTOR_WORKLOAD_CALENDAR_TIME

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the default start time and default end time for the inspector workload calendars. Users cannot schedule inspections before or after the start time and end time in the inspector workload calendar.

If you do not modify the start and end time, then the default start time is 8:00 am and the default end time is 5:00 pm.

Standard Choice values include:

Start Time

End Time

KEEP_COMPLETED_INSPECTION_ACTIVE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls whether a user can view and access an inspection after the inspection completes.

Standard Choice values can include:

Yes. The inspection remains active and continues to display in the Inspections tab in the Record or Building page after inspection completion or inspection approval.

No. Only the pending inspections display for the record.

LICENSE_TYPE

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

This Standard Choice defines the value options for the license type drop-down list.

Standard Choice values can include:

Alcohol

Beauty Salon

Business

LICENSED_PROF_ACTIVE_STATUS

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

This Standard Choice indicates all license statuses that Civic Platform would consider active. Any status in this Standard Choice can apply for a permit.

Standard Choice values can include:

{This value must exactly match a Standard Choice for the license status. For example:}

Active

Valid

LICENSED_PROF_EXPIRE_STATUS

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

This Standard Choice indicates all license statuses that Civic Platform would consider expired. Any status in this Standard Choice cannot apply for a permit.

Standard Choice values can include:

{This value must exactly match a Standard Choice for the license status. For example:}

Online Renewal Pending

Delinquent

Expired

LICENSED PROFESSIONAL TYPE

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

This Standard Choice defines the value options for the drop-down list of the licensed professional type. Adds the ability to store Education Providers in the Licensed Professional list. When you enable this Standard Choice, the Civic Platform displays the Provider option in the Licensed Professional Type drop-down list.

Standard Choice values can include:

Architect

Landscaper

Designer

Contractor

Developer

Pharmacist

Electrician

For each licensed professional type, click the Associated Document Group link to associate a document group with it. When licensed professional users upload an attachment to their accounts in Citizen Access, the document types belonging to the document group are options in the Type drop-down list in the Account Management page.

LIMIT_WORKSTATION_ACCEPT_PAYMENT

Product

Civic Platform

Type

System Switch

Description

This Standard Choice works in conjunction with [CASHIER_STATION](#).

Standard Choice values can include:

Yes. Only workstations defined in [CASHIER_STATION](#) can accept payments. If the value is YES and the current workstation name does not exist in [CASHIER_STATION](#), Civic Platform displays an error message when the user clicks a cashier function, including, for example, the Pay, Refund, Apply, Void, or Fund Transfer buttons.

No. Any computer workstation can manage payments as long as the user has permission.

LOAD_TO_RECORD_PORTLET

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines whether a record always opens in the record portlet when users select it from the Navigation drop-down list.

Standard Choice values can include:

Yes. Even if users originally open the record in a module portlet (such as the Building portlet), the record opens in the record portlet when selected from the Navigation list.

No {or undefined}. When users select a record from the Navigation drop-down list, it opens in the same portlet in which it was last opened, be it either the module portlet or the record portlet.

LOGO_TYPE_CATEGORY

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice is for a variety of uses as described below:

- Effective with the 7.3.3 release, Citizen Access public websites that use the new UX template require a Standard Choice value of ACA_NewUI_LOGO.
- Define logo type categories. Agencies use the USERINFOLOGO Standard Choice value to add an agency logo to the User Information portlet. The Standard Choice values must match the Value Desc for the AGENCY_LOGO_TYPE Standard Choice value of the Standard Choice [MULTI_SERVICE_SETTINGS](#).
- Agencies use the AGENCY_LOGO Standard Choice value to add an agency logo to ad hoc reports through the Accela Ad hoc Report portlet. If no logo file exists with this logo type, the system uses the Accela logo as the default.
- You can create values to define the grade cards for food facility inspection results, such as Grade A, Grade B, Grade C, Closure, to add grade card images to the Food Facility Inspection.

Standard Choice values can include:

ACA_NewUI_LOGO

USERINFOLOGO

AGENCY_LOGO

Grade A

Grade B

LONG_TERM_TIME_TRACKING

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines regular working hours for a typical work day. The Time Tracker function uses the regular working hours to calculate In Possession time.

Table 103: LONG_TERM_TIME_TRACKING Standard Choice Values

| Standard Choice Values | Value Description | Description |
|------------------------|--|---|
| ON_DUTY_TIME | Enter the am and pm designations with the 12-hour clock hour, for example:8 am | The on-duty time sets the time work typically begins. |
| OFF_DUTY_TIME | Enter the am and pm designations with the 12-hour clock hour, for example:5 pm | The off-duty time defines the time work typically ends. |

LOOKUP_TABLE_PAGE_SIZE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the page size for ASI look-up tables.

Standard Choice values can include:

10

MASKS

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice gives agencies the ability to control the configuration of a mask for the parcel number, SSN, or FEIN field. For example, when you specify a parcel number mask, users must follow a unique numbering sequence when entering parcel numbers in Civic Platform.

When you define a mask for the parcel number, SSN, or FEIN field, Civic Platform uses the mask for the field wherever you find it. If you do not define the mask, the field displays with the raw (unmasked) data.

Table 104: MASKS Standard Choice Values

| Standard Choice Value | Value Desc | Description |
|-----------------------|--|--|
| PARCEL_ID | Enter the variables for your parcel number mask. | PACEL_ID defines the mask element for the parcel number field. FEIN defines the mask element for the FEIN field, and SSN defines the mask element for the SSN field. See Table 105: Variables Available for Masks . See Table 106: Examples of Masks for examples of the effects of variables. |
| FEIN | Enter the variables for your FEIN mask. | |
| SSN | Enter the variables for the SSN mask. | |

| Standard Choice Value | Value Desc | Description |
|------------------------|------------|---|
| PARCEL_ID_MASKED_IN_DB | YesNo | This value allows you to store either the masked or unmasked parcel number in the database. The parcel table stores the parcel number. If the Value Desc is Yes, the database stores the masked value. Otherwise, The database stores the unmasked or system default parcel number. |

The Standard Choice value descriptions must use the variables in [Table 105: Variables Available for Masks](#) in any sequence. For a few examples of how the mask generates sequence and how it displays within Civic Platform see [Table 106: Examples of Masks](#).

Table 105: Variables Available for Masks

| Variable | Definition | Apply to Fields | Example Output |
|--------------------------|---|-------------------------|---|
| # | [0-9]Use the # symbol to represent a string of numeric combinations that allows a user to enter numbers 0 through 9. | Parcel Number,FEIN, SSN | 0811 results in ####. |
| ` | Escape character to ignore any special formats of characters | Parcel Number | ENG- results in ###-. |
| U | [A-Z]Any upper case letter character combination that uses A through Z | Parcel Number, SSN | STU results in UUU. |
| L | a-zAny lower case letter character combination that uses a through z. | Parcel Number, SSN | bldg results in LLLL. |
| A | [Aa 0-9]Any mixed letter case combination and numeric combination from A through Z, a through z, and 0 through 9. | Parcel Number,FEIN, SSN | Am8 results in AAA. |
| ? | [Aa]Any mixed letter case combination of upper and lower case letters from A through Z, and a through z. | Parcel Number, SSN | Xyz results in ???. |
| * | Replace any letter or digit with the asterisk symbol “*”. | FEIN, SSN | *** replaces three characters, digits, or their combination with “***” |
| [*L][*U][*A][*?] [*#] | Use the symbol after “*” (such as L, U, etc.) to represent the type of character that requires a user to enter, and replace the character entered with the asterisk symbol “*”. | FEIN, SSN | [*#] replaces the digit that the user entered with “*”. [*L] replaces the lower case letter that the user entered with “*”. |

Table 106: Examples of Masks

| Field | Mask | Possible Parcel Number, SSN or Masked FEIN |
|---------------|----------------------------|--|
| FEIN | AAA-###-**** | NYC-001-**** |
| FEIN | ###-***-AAAAA | 001-***-NewYC |
| Parcel Number | UUU-###-###-??? | JUL-020-110-00a |
| Parcel Number | LLLL-??-??-### | bldg-001-00A-129 |
| SSN | [*#][*#][*#]-[*#][*#]-#### | ***-**-1234 |

MASTER_SCRIPT_DEFAULT_VERSION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the version of master scripts to apply in the scripts. You can upgrade the master script version during a Civic Platform upgrade, while all versions of the master scripts exist in the system at the same time. You can continuously apply a specific version of master scripts, regardless of the master script upgrades.

Standard Choice values include:

{Master script version number to apply, for example: 7.2.0.000.}

Value Description field is optional. You can enter the description of the version or any note.

MAX_ATTACHMENT_SELECTION_NUMBER

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the maximum number of APO/GIS record attachment to an application, when you select the Select All option. If the number of records returned exceeds the maximum number that APO/GIS can be attach to an application, the attachment page becomes a selection page, even if you select the Attach All option.

Standard Choice values can include:

200

MEETING BODY

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the value options for meeting bodies. Users can update this list from either Standard Choices or Meeting Bodies.

Standard Choice values can include:

Board of Appeals

City Council

Planning Commission

Zoning Administrator

MEETING LOCATION

Product

Civic Platform

Type

System Switch

Description

Replaces the HEARING LOCATION Standard Choice.



Note:

HEARING LOCATION does not change MEETING LOCATION for Civic Platform Classic.

This Standard Choice determines the venues where you can conduct meetings, such as a City Hall or a County Administration Building.

The values you enter for this Standard Choice populate the Location drop-down list. Agency users can access this drop-down list from the Meeting Calendar list portlet under the Item secondary tab. You can enter up to 40 characters for each Standard Choice value.

Standard Choice values can include:

City Council Chamber

City Hall Main Room

County Administration Building

Civic Auditorium

MEETING MAX TIME

Product

Civic Platform

Type

System Switch

Description

Replaces HEARING MAX TIME Standard Choice.



Note:

HEARING MAX TIME does not change MEETING MAX TIME for Civic Platform Classic.

This Standard Choice determines the length (in minutes) of meetings. For example, you can measure meeting times in fifteen minute increments: 15, 30, 45, 60, 75, and 90.

The values you enter for this Standard Choice populate the Duration drop-down list. Agency users can access this drop-down list from the Meeting Calendar list portlet under the Item secondary tab. You can enter up to four characters for each Standard Choice value.

MEETING_NOTIFICATION_OUTLOOK_REMINDER

Product

Civic Platform

Type

System Switch

Description

This Standard Choice specifies the reminder time for Outlook meeting invites.

Standard Choice value is:

<number>

Value Desc:

minutes

hours

days

weeks

MEETING_REASON_COMMENT

Product

Civic Platform

Type

System Switch

Description

Replaces HEARING_REASON_COMMENT Standard Choice.

This Standard Choice determines the types of meeting reasons agency users can select, such as Tax Hearing or Application Review. Agency users select a meeting reason for each application on a meeting agenda. When you select a meeting reason, the comment associated with the meeting reason automatically populates the Comment field.

Enter the meeting reason in the Standard Choices Value field and the meeting comment in the Value Desc field. You can enter up to 30 characters in the Standard Choices Value field and up to 1024 characters in the Value Description field.

MEETING_TYPE_STATUS_GROUP

Product

Civic Platform

Type

System Switch

Description

Replaces HEARING_TYPE_STATUS_GROUP Standard Choice.

This Standard Choice determines the types of meetings your agency conducts. For example, you might create a different meeting status group for each commission in your agency's planning and zoning division. You might have a Housing Advisory and Appeals Board status group, a Land Use Appeals Board status group, and a Planning Commission status group.

The values you enter for this Standard Choice populate the Status Group drop-down list. This drop-down list displays in the Meeting Calendar Event Maintenance portlet. You can enter up to 30 characters in the Standard Choices Value field.

MEETING_TYPE_STATUS_{Group Name}

Product

Civic Platform

Type

System Switch

Description

Replaces the HEARING_TYPE_STATUS_{GROUP Name} Standard Choice.

This Standard Choice determines the status values for each meeting status group. The [STATUS_GROUP_NAME] portion of this Standard Choice is the name of the status group you configure using the [MEETING_TYPE_STATUS_GROUP](#) Standard Choice. You can enter three different meeting status values: APPROVED, PENDING, and DENIED.

The values you enter for this Standard Choice populate the Status drop-down list. Agency users can access this drop-down list from the Meeting Calendar list portlet under the Item secondary tab.

MODULE_AUDIT_FREQUENCY

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the frequency of random audits at the module level. Enter any modules for which you want to define a random audit frequency as a value, and enter the frequency, in number of months, as the value description. To define audit frequency at the agency level, see [RANDOM_AUDIT](#) Standard Choice.

Table 107: MODULE_AUDIT_FREQUENCY Standard Choice Values

| Standard Choice Values | Value Desc | Description |
|------------------------|--|--|
| Licensing | Enter X Months, where X represents number of months. For example, 2 Months | This value defines the frequency of random audits in the licensing module. |
| Case Management | Enter X Months, where X represents number of months. For example, 6 Months | This value defines the frequency of random audits in the case management module. |

MULTIPLE_APO_GIS_SELECTION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice enables the ability to select multiple APO or GIS data and attach them to a record.

Standard Choice values can include:

Yes. Turn the feature on.

No. Disable the feature.

MULTIPLE_LICENSE_PROFESSIONAL

Product

Civic Platform

Type

System Switch

Description

This Standard Choice gives agencies the option to associate more than one licensed professional with a new application (single portlet entry and review form). Agencies can also set a primary professional, add professionals, and remove professionals from the application.

Standard Choice values can include:

Yes

MULTI_SERVICE_SETTINGS

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice applies to multi-agency administration. The settings define which agency is the super agency for the management of services from multiple agencies and provides the ability to lock a service from licensed professionals or addresses by a condition.

Table 108: MULTI_SERVICE_SETTINGS Standard Choice Values

| Standard Choice Values | Value Desc | Description |
|-----------------------------|--|---|
| IS_SUPER_AGENCY | Yes, No | Set the value to Yes for the main agency (super agency), and No for sub-agencies. Citizen Access uses this value to determine if the current agency is a super agency. |
| ALLOW_SERVICE_LOCK_SEVERITY | Yes, No | Set the value to Yes to enable the ability to lock services by condition. Civic Platform provides a Service Lock option in the Severity drop-down list in the conditions portlets for licensed professionals and addresses. |
| AGENCY_LOGO_TYPE | This Value Desc must match the value from the Standard Choice LOGO_TYPE_CATEGORY . | This configuration matches the logo with the agency and service. Citizen Access uses this logo type to indicate which associated agency logo to attach the service. |

NEW_SPEAR_FORM_ENABLE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice gives agencies the option to use the redesigned single portlet entry and review form available since Civic Platform 6.5.0 release. For additional information on the differences between the new form and existing forms, see the Single Portlet Entry and Review Form (SPEAR) Implementation Technical Bulletin and *AA 6.5.0 Migration Document for SPEAR form Consolidation (07ACC-03396).pdf* available from Accela Customer Resource Center.

Standard Choice values can include:

Yes. Use the 6.5.0 application intake form.

No {or undefined}. Use the previous form that was implemented and designed prior to the Civic Platform 6.5.0 release.

ONE_INVOICE_FOR_ALL_CAPS

Product

Civic Platform

Type

System Switch

Description

To use the single invoice for multiple records functionality, you need to configure this Standard Choice. When configuring this Standard Choice, you can select from three values: Yes, No, and Prompt.

This Standard Choice relates to sequence number generator for invoices. If the invoice mask uses a variable which indicates different values for difference invoices, administrators must configure this Standard Choice so Civic Platform can use this mask to generate invoices in batch.

Table 109: ONE_INVOICE_FOR_ALL_CAPS Standard Choice Values

| Standard Choice Values | Value Desc | Description |
|------------------------|---|---|
| Yes | RECTYPE-ALIAS:{Record Type alias};RECTYPE-1:{Group};RECTYPE-2:{Type};RECTYPE-3:{sub type};RECTYPE-4:{Category};RECTYPE-MODULE:{model} | Create a single invoice number for all selected records. If the value description defines the fixed value of a variable which indicates different values for different invoices, Civic Platform can use this fixed value to generate an invoice number for multiple records. |
| No | - | Create a separate invoice number for each selected record. |
| Prompt | RECTYPE-ALIAS:{Fixed Record Type alias};RECTYPE-1:{Fixed Group};RECTYPE-2:{Type};RECTYPE-3:{Fixed sub type};RECTYPE-4:{Fixed Category};RECTYPE-MODULE:{Fixed module name} | Display a prompt that allows the user to choose whether or not to create a single invoice for all selected records. If the value description defines the fixed value of a variable which indicates different values for different invoices, Civic Platform displays a dialog box that prompts users to choose |

| Standard Choice Values | Value Desc | Description |
|------------------------|------------|---|
| | | whether to use this fixed value to generate an invoice number for multiple invoices or generate an invoice number for each record separately. |

ONLINE_PAYMENT_MAX_AMOUNT

Product

Citizen Access

Type

System Switch

Description

This Standard Choice defines the maximum payment amount per transaction for each payment method. If the value contains a module name, the payment limit applies to that module only. Otherwise, it applies to all modules.

Accele recommends that administrators set the maximum payment amount within the limit that the payment gateway allows payments. For example, if the payment gateway does not allow any payment over 300 dollars, enter "300" or a smaller number in the value description.

Standard Choices values include:

Check

<Module Name>_ Check

CreditCard

<Module Name>_ CreditCard

TrustAccount

<Module Name>_ TrustAccount

Note: The Standard Choice values are case-sensitive.

The Value Desc is the number indicating the maximum payment amount. For example: 500.

ONLINEPAYMENT_WEBSERVICE_URL

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice gives agencies the ability to accept payments online. This Standard Choice stores the URL for the web service for the online payment.

Standard Choices values include:

{The URL of the Web service your agency uses to accept online payments, for example, <http://<youragency.gov>/portlets/services/OnlinePaymentWebService?wsdl.>}

ORGANIZATION_CONTACT_MATCH_CRITERIA

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

To enable close-match searching, configure the following standard choices in the Standard Choices portlet in the Setup Admin ([Editing Standard Choices in the Setup Admin](#)):

- ENABLE_CONTACT_ADDRESS
- INDIVIDUAL_CONTACT_MATCH_CRITERIA
- ORGANIZATION_CONTACT_MATCH_CRITERIA

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.

Standard Choices: ORGANIZATION_CONTACT_MATCH_CRITERIA

Submit New Delete Help

Standard Choices Item Name: ORGANIZATION_CONTACT_MATCH_CRITERIA

Description: (250 char max) Configure the close match criteria used to identify an organization contact.


Status: Enable Disable

Type: System Switch Shared drop-down EMSE Business Configuration

You can add 10 contact fields in one criteria row at most.
Contacts are close matches if they match all the fields in a criteria row.

| Criteria | Priority | Active |
|---|----------|-------------------------------------|
| DBA/Trade Name;FEIN | 1 | <input checked="" type="checkbox"/> |
| DBA/Trade Name;E-mail;Organization Name | 2 | <input checked="" type="checkbox"/> |
| Organization Name;Telephone | 3 | <input checked="" type="checkbox"/> |
| First Name;Full Name;Gender;Last Name | 4 | <input checked="" type="checkbox"/> |

Table 110: ORGANIZATION_CONTACT_MATCH_CRITERIA Standard Choice Values

| Value | Description |
|----------|--|
| Criteria | <p>Click the picker to select the contact fields as the matching criteria. If you select multiple fields in one row, the system joins the fields by a logical AND. The system joins criteria in different rows by a logical OR.</p> <p> Note: Civic Platform searches for close matches based on the criteria rows in which every field has value, and disregards the criteria rows in which any field has no value.</p> |
| Priority | The priority determines the order of the matches found:Close matching contacts that meet the criteria of a higher priority always display before those that meet the criteria of a lower priority.In cases when only one match is necessary for later-on processing, the close |

| Value | Description |
|--------|--|
| | matching contact that meets the criteria of the highest priority is the default one that Civic Platform selects. |
| Active | Select to include this item on the list of Standard Choices. |

PARCELSET_SCRIPT_LIST

Product

Civic Platform

Type

System Switch

Description

Allows EMSE scripts to execute on a parcel set. Enter the EMSE script name as the Standard Choices value. Then, in the Value Desc field, enter the name to display in the drop-down list for this script.

Standard Choice values can include:

{EMSE Script Name}

PART_CALCULATE_TYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the formula options for calculating the costs of parts.

Standard Choice values can include:

LIFO. Stands for last-in, first-out, meaning that the most recently received items are issued/transferred/adjusted/reserved first in transactions.

FIFO. Stands for first-in, first-out, meaning that the oldest inventory items are issued/transferred/adjusted/reserved first in transactions.

Simple. The unit cost of inventory parts equals to the sum of the unit cost of the most recently received items and the previous average unit cost, and divided by two.

Weighted. Similar to the Simple formula, but weighted by quantity.

PARTIAL_CAP_CONDITION_ENABLE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines which step on the application intake form to display the conditions. When enabled, this Standard Choice displays the conditions applied to partial applications in the pop-up window for the application intake form.

Standard Choice values can include:

Partial CAP. The Condition pop-up window displays when the user clicks the partial application.

Fee Estimate. When users click the Fee Estimate button on the application intake form, the record condition notice portlet embeds in the Fee Estimate form.

PARTIALLY_COMPLETED_CAP_PURGE_DAYS

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice, together with your settings for the CLEAREXPRIEDINCOMPLETECAP script and also the batch job for running the script, can periodically purge those partial applications that users Save without Submitting in Civic Platform, or Save and Resume later in Citizen Access.

The Standard Choice value includes:

{Any numeric value, such as 90, that represents the number of days that partially completed applications remain before Civic Platform removes the partial applications.}

For example, if today is April 1, 2008 and you set the value to 30 days, when the batch job runs and executes the CLEAREXPRIEDINCOMPLETECAP script, all the partial applications created on March 31, 2008 (which is day number 1 in counting) through March 2 remain in Civic Platform, and all partial applications with a creation day of 31 (March 1, in this case) or earlier are purged.

PARTS_ALLOW_NEGATIVE_QUANTITY

Product

Civic Platform, Mobile Office

Type

System Switch

Description

This Standard Choice allows the quantity of a part inventory to be negative. Civic Platform sends an alert message when a user attempts a part transaction that requests a quantity greater than the quantity on hand.

Standard Choice values can include:

Yes {default}. Part inventory items can have a negative quantity.

No. Part inventory items cannot have a negative quantity.

PASSWORD_CALCULATION_SCORE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice allows agencies modify the password strength calculation score. The Standard Choice value descriptions must use the variables in [Table 111: PASSWORD_CALCULATION_SCORE Standard Choice Values](#).

Table 111: PASSWORD_CALCULATION_SCORE Standard Choice Values

| Standard Choice Value | Value Desc |
|-------------------------------|-----------------|
| Number of Characters | +(n*4) |
| Repeated Characters | -(n*4) |
| Has 3 Number | +5 |
| Has 2 Special Characters | +5 |
| Has Upper and Lower Character | +10 |
| Has Numbers and Characters | +15 |
| Only Characters | -10 |
| Only Numbers | -10 |
| Weak Password | score<=34 |
| Medium Password | 34 < score <=34 |
| Strong Password | 68 < score |

PASSWORD_POLICY_SETTINGS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice allows agencies to create new password policy settings, or to modify settings within an existing password policy setting. You must set the policy settings with appropriate values according to the Standard Choice values shown below. Use double pipes (||) to split standard value descriptions and a colon (:) to split elements.

Table 112: PASSWORD_POLICY_SETTINGS Standard Choice Values

| Standard Choice Value | Value Desc |
|-----------------------|--|
| Example_JavaBean1 | JAVABEAN:com.accela.security.password.LengthValidator length:8 errorMessage: Password is too short. |
| Example_JavaBean2 | JAVABEAN:com.accela.security.password.UpperCharValidator number:2 errorMessage: Password must contain uppercase. |
| Example_JavaBean3 | JAVABEAN:com.accela.security.password.ExcludeUserIDValidator errorMessage:Do not allow user id |
| Example_JavaBean4 | JAVABEAN:com.accela.security.password.ExcludeUserIDValidator number:5 errorMessage:Do not allow previous password. |
| Example_WS | WS: https://bridgeview.org:3080/CheckACAPolicy?wsdl errorMessage: check policy failed. |

PAYMENT_CREDITCARD_TYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the acceptable credit card types. When accepting credit card payments, cashiers can use magnetic card reader to automatically read credit card information into Civic Platform, or manually enter the information.

Standard Choice values can include:

MasterCard

American Express

Visa

Discover

Diner's Club

PAYMENT_CHECK_ACCOUNT_TYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the acceptable check account types.

Table 113: PAYMENT_CHECK_ACCOUNT_TYPE Standard Choice Values

| Standard Choice Value | Value Desc |
|-----------------------|------------|
| Checking | C |
| Savings | S |
| Business Checking | BC |
| Business Savings | BS |

PAYMENT_CHECK_TYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice allows agencies to take payments from electronic checks and from account debit cards. After you create this Standard Choice, you can accept electronic checks and accept account debit cards.

Standard Choice values can include:

Account Debit

Electronic Check

PAYMENT_GROUP

Product

Citizen Access

Type

System Switch

Description

This Standard Choice defines one service fee structure for each module in Citizen Access. This provides the flexibility to use service fee structure for one module and to use another service fee structure for another module. For the modules that are assigned to the same service fee structure, their record fees can be paid together in a shopping cart as a single transaction. For the modules are assigned to different service fee structures, their record fees need to be paid separately by module. Currently only OPC CoBrand Plus supports this feature. For other payment gateways, they only support one service fee structure for all modules; the configuration on this Standard Choice does not work for them.

Standard Choice values may include:

{Enter the module name, such as Building, Licenses, and so forth.}

Building

Licenses

Value Desc:

{Enter the fee structure number that the third-party payment gateway provider provides.}

PAYMENT_PROCESSING_DEFAULT_METHOD

Product

Civic Platform

Type

System Switch

Description

Use this Standard Choice to set the default payment method for the current user ID. If you do not define this Standard Choice, Civic Platform uses cash as the payment method.

Standard Choices Item - Edit

Use this form to set up a Standard Choices Item.

Standard Choices Item Name: PAYMENT_PROCESSING_DEFAULT_METHOD

Description: (250 char max) Specify a default payment method for each user ID.

Status: Enable Disable

| Standard Choices Value | Value Desc |
|------------------------|------------|
| cdupay | Debit Card |

Update Add Cancel

Standard Choice values include:

{Enter the current User's ID.}

Value Desc

{Provide the default payment method, for example, Debit Card.}

PAYMENT_PROCESSING_METHOD

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the payment methods for each module. If you do not configure this Standard Choice, Civic Platform provides all available payment methods.

Configure this Standard Choice to display each module's acceptable payment methods in the Payment Method drop-down list. Specify the module in the Standard Choices value field and all acceptable payment methods in the Value Desc field.

Standard Choices Item - Edit

Use this form to set up a Standard Choices Item.

Standard Choices Item Name: PAYMENT_PROCESSING_METHOD

Description: (250 char max) Defines the payment methods available for each module on agency users. Standard Choice value descriptions may include

Status: Enable Disable

| Standard Choices Value | Value Desc |
|------------------------|---|
| Building | Cash, Check, Credit Card, Trust Account |
| Licensing | Cash, Trust Account |

Update Add Cancel

Standard Choice values can include:

{Enter the module names. For example, Building, Licenses, and so forth.}

Value Description:

{Enter a comma delimited list from 17 acceptable payment methods.}

ATM, Billed, Cash, Check, Coupon, Credit Card, Debit Card, Internal Transfer, Journal Entry, Misc Credit, Money Order, Multiple Tenders, Other, Trust Account, Waiver, Write Off, Lockbox

PAYMENT_PROCESSING_RECORD_RECEIPT

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the receipt mask to use in the Payment Processing portlet.

- If you set the Standard Choice value to Record, all records in the Payment Processing portlet use their own record receipt mask for the receipt number generation.
- If you set the Standard Choice value to Payment Processing or null, and you define the PP-Receipt mask in the sequence generator administration tool, the Payment Processing portlet uses a customized receipt mask (according to the PP-Receipt mask definition) for each payment, which can involve one or more records.
- If you set the Standard Choice value to Payment Processing or null, and you do not define the PP-Receipt mask in the sequence generator administration tool, the Payment Processing portlet uses an agency-generated receipt mask for each payment, which can involve one or more records.

Standard Choice values can include:

Record

Payment Processing

PAYMENT_RECEIVED_TYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the value options for the Received drop-down list field on all payment locations in Civic Platform, and the value options for the Refunded drop-down list field on the Refund page. The Received or Refunded field displays the manner in which Civic Platform received the payment.

Standard Choice values can include:

In Person

Mail

Fax

PAYMENT_REMITTER_CONTACT_TYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines a “remitter” contact type, which displays on the check endorsement page. Set the value of this Standard Choice to a valid contact type, for example, Applicant.

An administrator must map this Standard Choice value to an existing contact type, which you define in the Standard Choice CONTACT_TYPE.

PENALTY_FEE_FUNC

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines possible penalty fee recalculation methods used in batch processing licenses.

Standard Choice values can include:

None

Percentage

Simple

PENALTY_INTERVAL_UNITS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the interval units used to set up the renewal information in licensing.

Standard Choice values can include:

Days

Months

Years

PHONE_NUMBER_IDD

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice defines phone number country codes. The addition of country codes allows agencies to associate international phone and fax numbers with application contacts, licensed professionals, owners, or public users.

The Standard Choice values listed below correspond to the Standard Choice values for **COUNTRY**.

Table 114: PHONE_NUMBER_IDD Standard Choice Values

| Standard Choice Value | Value Desc | Description |
|-----------------------|------------|--------------------------|
| AL | 355 | Albania |
| DZ | 213 | Algeria |
| AS | 684 | American Samoa |
| AD | 376 | Andorra |
| AO | 244 | Angola |
| AQ | 672 | Antarctica |
| AR | 54 | Argentina |
| AM | 374 | Armenia |
| AW | 297 | Aruba |
| AU | 61 | Australia |
| AT | 43 | Austria |
| AZ | 994 | Azerbaijan |
| BH | 973 | Bahrain |
| BD | 880 | Bangladesh |
| BY | 375 | Belarus |
| BE | 32 | Belgium |
| BZ | 501 | Belize |
| BJ | 229 | Benin |
| BT | 975 | Bhutan |
| BO | 591 | Bolivia |
| BA | 387 | Bosnia and Herzegovina |
| BW | 267 | Botswana |
| BR | 55 | Brazil |
| BN | 673 | Brunei |
| BG | 359 | Bulgaria |
| BF | 226 | Burkina Faso |
| BI | 257 | Burundi |
| KH | 855 | Cambodia |
| CM | 237 | Cameroon |
| CA | 1 | Canada |
| CV | 238 | Cape Verde |
| CF | 236 | Central African Republic |
| TD | 235 | Chad |
| CL | 56 | Chile |
| CN | 86 | China |
| CC | 61 | Cocos Islands |
| CO | 57 | Colombia |

| Standard Choice Value | Value Desc | Description |
|-----------------------|------------|-----------------------------|
| KM | 269 | Comoros |
| CG | 242 | Congo |
| CK | 682 | Cook Islands |
| CR | 506 | Costa Rica |
| HR | 385 | Croatia |
| CU | 53 | Cuba |
| CY | 357 | Cyprus |
| CZ | 420 | Czech Republic |
| CI | 225 | Cote d'Ivoire (Ivory Coast) |
| DK | 45 | Denmark |
| DJ | 253 | Djibouti |
| EC | 593 | Ecuador |
| EG | 20 | Egypt |
| SV | 503 | El Salvador |
| GQ | 240 | Equatorial Guinea |
| ER | 291 | Eritrea |
| EE | 372 | Estonia |
| ET | 251 | Ethiopia |
| FK | 500 | Falkland Islands |
| FO | 298 | Faroe Islands |
| FJ | 679 | Fiji |
| FI | 358 | Finland |
| FR | 33 | France |
| GF | 594 | French Guiana |
| PF | 689 | French Polynesia |
| GA | 241 | Gabon |
| GM | 220 | Gambia |
| GE | 995 | Georgia |
| DE | 49 | Germany |
| GH | 233 | Ghana |
| GI | 350 | Gibraltar |
| GR | 30 | Greece |
| GL | 299 | Greenland |
| GP | 590 | Guadeloupe |
| GT | 502 | Guatemala |
| GN | 224 | Guinea |
| GW | 245 | Guinea-Bissau |
| GY | 592 | Guyana |
| HT | 509 | Haiti |
| HN | 504 | Honduras |
| HK | 852 | Hong Kong |

| Standard Choice Value | Value Desc | Description |
|-----------------------|------------|------------------|
| HU | 36 | Hungary |
| IS | 354 | Iceland |
| IN | 91 | India |
| ID | 62 | Indonesia |
| IR | 98 | Iran |
| IQ | 964 | Iraq |
| IE | 353 | Ireland |
| IL | 972 | Israel |
| IT | 39 | Italy |
| JP | 81 | Japan |
| JO | 962 | Jordan |
| KZ | 7 | Kazakhstan |
| KE | 254 | Kenya |
| KI | 686 | Kiribati |
| KP | 850 | North Korea |
| KR | 82 | South Korea |
| KW | 965 | Kuwait |
| KG | 996 | Kyrgyzstan |
| LA | 856 | Laos |
| LV | 371 | Latvia |
| LB | 961 | Lebanon |
| LS | 266 | Lesotho |
| LR | 231 | Liberia |
| LY | 218 | Libya |
| LI | 423 | Liechtenstein |
| LT | 370 | Lithuania |
| LU | 352 | Luxembourg |
| MO | 853 | Macao |
| MK | 389 | Macedonia |
| MG | 261 | Madagascar |
| MW | 265 | Malawi |
| MY | 60 | Malaysia |
| MV | 960 | Maldives |
| ML | 223 | Mali |
| MT | 356 | Malta |
| MH | 692 | Marshall Islands |
| MQ | 596 | Martinique |
| MR | 222 | Mauritania |
| MU | 230 | Mauritius |
| YT | 269 | Mayotte |
| MX | 52 | Mexico |

| Standard Choice Value | Value Desc | Description |
|-----------------------|------------|-----------------------|
| FM | 691 | Micronesia |
| MD | 373 | Moldova |
| MC | 377 | Monaco |
| MS | 976 | Montserrat |
| MA | 212 | Morocco |
| MZ | 258 | Mozambique |
| NA | 264 | Namibia |
| NR | 674 | Nauru |
| NP | 977 | Nepal |
| NL | 31 | Netherlands |
| AN | 599 | Netherlands Antilles |
| NC | 687 | New Caledonia |
| NZ | 64 | New Zealand |
| NI | 505 | Nicaragua |
| NG | 234 | Nigeria |
| NU | 683 | Niue |
| NF | 672 | Norfolk Island |
| NO | 47 | Norway |
| OM | 968 | Oman |
| PK | 92 | Pakistan |
| PW | 680 | Palau |
| PS | 970 | Palestine |
| PA | 507 | Panama |
| PG | 675 | Papua New Guinea |
| PY | 595 | Paraguay |
| PE | 51 | Peru |
| PH | 63 | Philippines |
| PN | 48 | Pitcairn |
| PT | 351 | Portugal |
| QA | 974 | Qatar |
| RE | 262 | Reunion |
| RO | 40 | Romania |
| RU | 7 | Russia |
| RW | 250 | Rwanda |
| SH | 290 | Saint Helena |
| SM | 378 | San Marino |
| ST | 239 | Sao Tome and Principe |
| SA | 966 | Saudi Arabia |
| SN | 221 | Senegal |
| CS | 381 | Serbia and Montenegro |
| SC | 248 | Seychelles |

| Standard Choice Value | Value Desc | Description |
|-----------------------|------------|----------------------|
| SK | 421 | Slovakia |
| SB | 677 | Solomon Islands |
| SO | 252 | Somalia |
| ZA | 27 | South Africa |
| ES | 34 | Spain |
| LK | 94 | Sri Lanka |
| SD | 249 | Sudan |
| SR | 597 | Suriname |
| SZ | 268 | Swaziland |
| SE | 46 | Sweden |
| CH | 41 | Switzerland |
| SY | 963 | Syria |
| TW | 886 | Taiwan |
| TJ | 992 | Tajikistan |
| TZ | 255 | Tanzania |
| TH | 66 | Thailand |
| TG | 228 | Togo |
| TK | 690 | Tokelau |
| TO | 676 | Tonga |
| TN | 216 | Tunisia |
| TR | 90 | Turkey |
| TM | 993 | Turkmenistan |
| TV | 688 | Tuvalu |
| UG | 256 | Uganda |
| UA | 380 | Ukraine |
| AE | 971 | United Arab Emirates |
| US | 1 | United States |
| UY | 598 | Uruguay |
| UZ | 998 | Uzbekistan |
| VU | 678 | Vanuatu |
| VN | 84 | Vietnam |
| WF | 681 | Wallis and Futuna |
| EH | 685 | Western Sahara |
| YE | 967 | Yemen |
| ZW | 263 | Zimbabwe |

PHONE_NUMBER_IDD_ENABLE

This Standard Choice expands the phone and fax number fields to allow users to enter a country code. Once you enable this Standard Choice, you must enable and add values to the Standard Choice [PHONE_NUMBER_IDD](#). When these two Standard Choices are configured, Civic Platform and Citizen

Access auto-populate the phone number Country Code field once a Country is selected from the Country drop-down list.

Standard Choice values may include:

Yes

No

POINT_OF_SALE_FEE_SCHEDULE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice allows an agency to specify the fee schedule category that you want to apply to point of sale items. Use the Value and Value Desc fields to relate a fee item and to a specific fee schedule.



Note:

Before you set the Value for this Standard Choice you must have a fee schedule you can apply to point of sale items. The POINT_OF_SALE_FEE_SCHEDULE Value and Value Desc fields associate a fee item to a specific fee schedule. The Value Desc field must match the fee schedule name description exactly.

Standard Choice values can include:

<pos_type > _<module_name. <pos_type> is the point of sale type that you define in [POINT_OF_SALE_TYPE](#) and <module_name> is the Accela module for which you want to provide point of sale items, Food_Building or Clothing_AMS, for example.



Note:

Create Standard Choice values for each Accela module that requires the point of sale feature.

Value Desc:

<FeeScheduleName. <FeeScheduleName> can contain multiple comma delimited fee schedules; POSFeeSchedule1, POSFeeScheduleBLDG, for example.

The following, in the Point of Sale Payment portlet, shows the Food point of sale item in the POS Type drop-down list. The user applies the Food point of sale item to the BLD_WS fee schedule.

| Transaction ID | Fee Items | Total Fee | Status | Payment Method | Cashier ID | Record Date/Time | Recorded By | Workstation ID | Cash B |
|----------------|-----------|-----------|--------------|----------------|------------|---------------------|-------------|----------------|---------|
| 1245 | 1 | \$100.00 | FEE INVOICED | | | 10/15/2009 01:26:09 | MICHELLE | MICHELLE-KE | Michell |

| Category | Version | Fee Item | Quantity | Unit Price | Amount |
|----------|---------|---------------------------------|----------|------------|----------|
| BLD_WS | 07_2007 | B_FP01(Refund Processing - 200) | 2 | 53.00 | \$100.00 |
| Select | Select | Select | | | \$0.00 |

POINT_OF_SALE_TYPE

Product

Civic Platform

Type

System Switch

Description

The Standard Choice provides an agency with a way to customize a unique record ID for different values in the Value Desc field. You configure this Standard Choice differently for Accela-hosted and on-premise deployments.

Standard Choices value:

{Set the POINT_OF_SALE_TYPE value by entering each general type of fee item you want to apply a fee to when making a point of sale. Create one value for each type of fee item. For example, values might be Food, Clothing, or Media.}

Value Desc (for Accela-hosted deployments):

USER=Internal;CapID=<my_record_ID>. <my_record_ID> is a dummy record ID. For example, you can set the Value Desc to: **USER=Internal;CapID=10FDD-00000-#0001**.



Note:

Civic Platform uses the dummy record ID as a placeholder to enable point of sale functionality, the dummy record ID does not display to any Civic Platform users.

Value Desc (for on-premise deployments)

USER=Public;CapID=<record_ID>. If on-premise sites need to enter a customizable record ID that applies a dummy record ID for each fee item value, then <record_ID> must follow the format of xxxxx-xxxxx-#xxxx where xxxx can be any alphanumeric value. For example, if Media is the value, then the Value Desc field might look like this: **USER=Public;CapID=10POS-0000-#0000**.

POPULATE_CURRENT_USER_TO_APPLICANT

Product

Civic Platform

Type

System Switch

Description

Each module listed populates the current user as the applicant in the Single Portlet Entry and Renewal form in Citizen Access.

Standard Choice values can include:

{Each value must be one of the modules, spelled exactly as it appears in the module drop-down list in Civic Platform.}

PRIORITY

Product

Civic Platform

Type

System Switch

Description

Based on your agency requirements, specify the priority levels to appear in the Priority field.

Standard Choice values can include:

- 1
- 2
- 3

PRODUCTION_UNIT_TYPE

Product

Civic Platform, Mobile Office

Type

System Switch

Description

Specifies choice values for the Unit of Production Field drop-down list used for tracking work order production.

Standard Choice values can include:

- Each
- Feet
- Acres
- Miles

PROFESSIONALSET_SCRIPT_LIST

Product

Civic Platform

Type

System Switch

Description

Allows you to execute EMSE scripts on a licensed professional set. Enter the EMSE Script Name as the Standard Choices value. Then, in the Value Desc field, enter the name to display in the drop-down list for this script.

Standard Choice values can include:

{EMSE Script Name}

PROX_ALERT_ACTION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice is required for proximity alerts to function.

Standard Choice values can include:

Acknowledged

Ignore

You must add both values separately.

PROXIMITY ALERT DISPLAY GIS map viewer

Product

Civic Platform, GIS

Type

System Switch

Description

After you add the Standard Choice, when a proximity alert is activated, the GIS map viewer displays with the GIS objects associated with the application. This occurs after Civic Platform assigns an action to and saves all proximity alerts in a workflow task.

Standard Choice values can include:

Do not enter a value for this Standard Choices item.

RACE

Product

Civic Platform, Mobile Office

Type

System Switch

Description

The Standard Choice defines a list of race options that users can select for contacts.

Standard Choice values can include:

Black

White

Brown

Yellow

RANDOM_AUDIT

Product

Civic Platform

Type

System Switch

Description

This Standard Choice allows you to configure the random audit functionality.

Table 115: RANDOM_AUDIT Standard Choice Values

| Standard Choice Values | Value Desc | Description |
|------------------------|---|---|
| AUDIT_MAXIMUM_RESULT | Any numerical value up to 50,000. Default: 50,000 | This value specifies the maximum number of records that can be part of the audit set. |
| AUDIT_FREQUENCY | X Months (where X represents number of months) For example:2 Months | This value defines the audit frequency (in number of months) at the agency level. To define audit frequency at the module level, see MODULE_AUDIT_FREQUENCY . |
| AGENCY_EMAIL_ADDRESS | Additional e-mail address(es) that you want to blind courtesy copy the report to. | The report is automatically sent to the email addresses specified in the record contacts or Report Manager. You can blind courtesy copy (bcc) it to additional addresses. The default From email address is the agency administrator's address. |

REASON_FOR_RESCHEDULING_CANCELLING_EXAMINATION

Product

Civic Platform, Citizen Access

Type

System Switch

Description

The Standard Choice defines the reasons users must give to reschedule an examination or cancel an exam. For example, enter "Need to transfer to a bigger room to hold more students." to the Value field as a reason. If you do not define a reason, users cannot reschedule or cancel an exam.

RECENTLY_HISTORY_SIZE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls the number of items that display in the Recently Viewed drop-down list when users click the Navigation button on the toolbar. Default value is 10.

Recently Viewed displays various types of content. When hovering over the item identification number, hover text displays what type of data element it is. For example, Record or Contact.



REF_ADDRESS_TYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the value options for the reference address type. Use this Standard Choice for the reference address in conjunction with FID [0276-Address Type Group](#) and FID [0277-Address Type for the reference address](#) (when enabled).

Super agency administrators must configure this Standard Choice to enable the creation of records and services with external addresses.

Standard Choice values can include:

- Asset Address
- Parcel Address
- Right of Way
- Street Row

REFERENCE_CONTACT_RELATIONSHIP

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the value options in the current/target contact role drop-down list that users can select when associating a reference contact with another one. The two reference contacts can be two organization contacts, or two individual contacts, or one individual contact and one organization contact.

You can go to the Standard Choices portlet in the Setup Admin, select the Standard Choice under the Contact tree node, and define the Standard Choice values.

Standard Choices: REFERENCE_CONTACT_RELATIONSHIP

Submit New Delete Help

Standard Choices Item Name: REFERENCE_CONTACT_RELATIONSHIP

Description: (250 char max) Define the drop down list values that describe the relationships between two reference contacts.

Status: Enable Disable

Type: System Switch Shared drop-down EMSE Business Configuration

| Contact Role * | Contact Role en_US * | Active |
|------------------------------|----------------------|-------------------------------------|
| <input type="checkbox"/> CEO | CEO | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> CET | CET | <input checked="" type="checkbox"/> |

Table 116: REFERENCE_CONTACT_RELATIONSHIP Standard Choice Values

| Value | Description |
|---------------------------------|--|
| Contact Role Contact Role en_US | Define the possible contact roles, including the current contact role and target contact role, that reference contacts can play when users configure their association relationship. |
| Active | Mark the check box to include this item on the list of Standard Choices. |

REFUND_PAYMENT_REASON

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines all possible options in the Reason field that users can select when refunding payments. You can enter each possible reason as a Standard Choice value.

REGIONAL_MODIFIER

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the value options for the regional modifier.

Standard Choice values can include:

1

1.5

2.0

RELATED_CAP_SUMMARY

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines whether the record summary displays on the Renewal tab, Related Records tab, or both.

Standard Choice values can include:

Related

Renewal

Value Desc:

Yes

RELATED_RECORDS_DEFAULT_VIEW

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the default view mode of the Related Records tab as either tree view or list view. The Related Records tab displays in the default view mode, when opened the first time. Users can switch between the two view modes.

Standard Choice values can include:

TreeView {Default}

ListView

RELATED_CAP_CONFIG

Product

Civic Platform

Type


System Switch

Description

This Standard Choice controls the display of the Related Record section and the tree view of the Related Records tab.

Table 117: RELATED_CAP_CONFIG Standard Choice Values

| Standard Choice Value | Value Desc | Description |
|---------------------------------------|------------|--|
| DISABLE_IN_EDIT_RECORD_BY_SINGLE_FORM | Yes, No | If you set the value to Yes, the Related Record section does not display in the Edit |

| Standard Choice Value | Value Desc | Description |
|-----------------------|--|---|
| | | <p>Record By Single Form which opens when users click the Summary button for a record.</p> <p>If you set the value to <i>No</i>, the Related Records section displays in the Edit Record By Single Form which opens when users click the Summary button for a record.</p> <p> Note: This Standard Choice value does not affect the Edit Record By Single Form that opens for a partial record.</p> |
| DISPLAY_CONFIG | {List field names in pairs of dollar signs.} \$ALTERNATE_CAP_ID \$ [CAP_TYPE]\$CAP_SUBMITTED_DATE\$ APPLICATION_NAME\$ | The value defines the fields that show in the Related Records tree view. |

REMOVE_PAY_FEE

Product

Citizen Access

Type

System Switch

Description

This Standard Choice controls the display of the Pay Fee link from the Fees section of the Record Detail page and the Status column on the Record List page.

Standard Choices values include:

Yes. Removes the Pay Fee link from view.

No. Displays the Pay Fee link when your agency supports online payment processing.

REMOVE_REQUIRED_IN_ADMIN_CONDITIONS

Product

Civic Platform

Type

System Switch

Description

When administrators add or manage conditions (including conditions of approval and general conditions) in Civic Platform, this Standard Choice controls whether Required displays as an option in the Severity field of the conditions.

Standard Choice values are:

Conditions of Approval

Conditions

Value Descriptions:

Yes. The Required option is not available for the operations listed in [Table 118: Operations Affected by REMOVE_REQUIRED_IN_ADMIN_CONDITIONS](#).

No. The Required option is available for the operations listed in the table.

Table 118: Operations Affected by REMOVE_REQUIRED_IN_ADMIN_CONDITIONS

| Portlet or Tab | Operation |
|---|---|
| Condition Maintenance portlet | Any condition-related operation. See Figure 13: Severity Field in the Condition Maintenance Portlet for an example. |
| Reference APO (address, parcel, or owner) portlet > Condition tab Reference Professional portlet > Condition tab | Any condition-related operation |
| Set portlet > Address, Parcel, or Professional tab > Conditions tab | Any condition-related operation |
| Set portlet > Record tab > Condition of Approval, or Conditions tab | Adds a standard condition |
| Record (including Building, Planning...), or Inspections portlet > Condition of Approval or Conditions tab | Adds standard condition |

Record (including Building, Planning...) portlet > Related Record tab

Looks up records. Selects conditions (general conditions, inspection conditions, or conditions of approval) to copy when cloning or copying a record. See [Figure 14: Select Conditions to Copy Dialog](#) for an example.



Note:

If the Required option does not display in the Select Conditions to Copy dialog, but you disable the Standard Choice REMOVE_REQUIRED_IN_DAILY_CONDITIONS, Civic Platform selects the required conditions to copy by default.

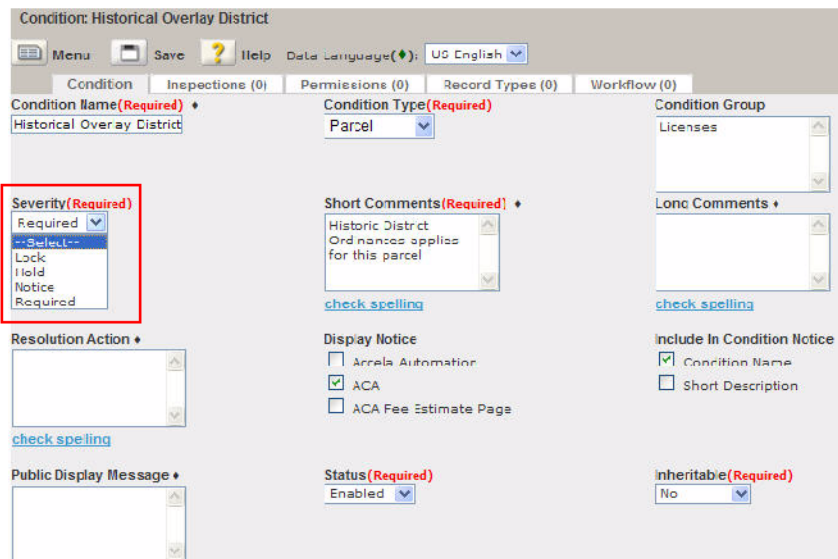


Figure 13: Severity Field in the Condition Maintenance Portlet

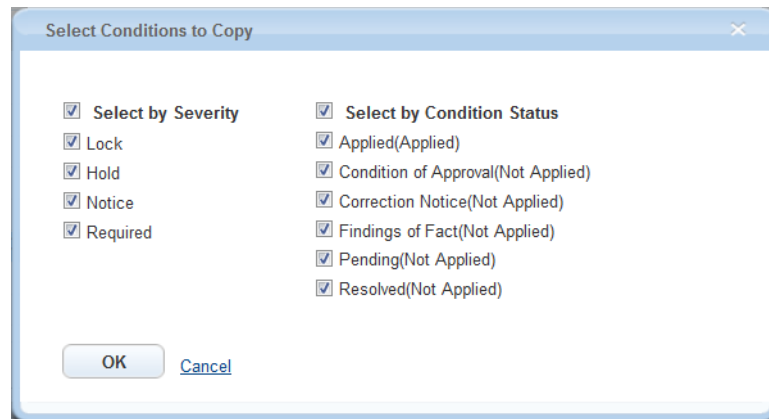


Figure 14: Select Conditions to Copy Dialog

REMOVE_REQUIRED_IN_DAILY_CONDITIONS

Product

Civic Platform

Type

System Switch

Description

When users add or manage conditions (including conditions of approval and general conditions) in Civic Platform, this Standard Choice controls whether Required displays as an option in the Severity field of the conditions.

You can set this configuration for each module, Building for example.

Standard Choice values can include:

Building

License

Enforcement

Value Descriptions:

Yes. When users work in the specified module, the Required option is not available for the operations listed in [Table 119: Operations Affected by REMOVE_REQUIRED_IN_DAILY_CONDITIONS](#).

No. When users work in the specified module, the Required option is available for the operations listed in the table.

Table 119: Operations Affected by REMOVE_REQUIRED_IN_DAILY_CONDITIONS

| Portlet or Tab | Operation |
|---|--|
| Record (including Building, Planning...), or Inspections portlet > Condition of Approval or Condition tab | Creates a daily condition See Figure 15: Severity Field in the Add Condition Portlet for an example. |
| Record > Condition Notice window | View the details of a condition |
| Set portlet > Record tab > Condition of Approval, or Conditions tab | Creates a daily condition |

Figure 15: Severity Field in the Add Condition Portlet

REPORT_CRITERIA_LANGUAGE

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice defines the available reporting languages. A language abbreviation is listed as the Standard Choice value, and the language name is listed as the Standard Choice value description.

Standard Choice values may include:

- AR (Arabic)
- EN (English)

REPORTS FROM GIS OBJECTS

Product

Civic Platform, GIS

Type

System Switch

Description

This Standard Choice enables users to run reports based on GIS object sets.

Standard Choice values can include:

{Enter the applicable report string. This is not the actual report, but a reference to the report.}

REPRINT_REASONS

Product

Citizen Access

Type

System Switch

Description

This Standard Choice defines the possible reasons for authorized agents or clerks to select when they want to reprint a license tag in Citizen Access.

Standard Choice values include:

{Enter any reprint reason. For example, Out of Ink.}

ROUTE_OPTIMIZER_PROVIDER

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the approach to integrating the third-party route optimizer. For detailed integration instructions, see “Configuring Inspection Route Sheets” in the Inspections chapter of the *Civic Platform Administrator Guide*.

Table 120: ROUTE_OPTIMIZER_PROVIDER Standard Choice Values

| Standard Choice Value | Value Description | Description |
|-----------------------|--|--|
| type | jar | When your agency integrates a third-party route optimizer by way of a jar package, you must add these values and value descriptions. |
| className | Enter your class name. For example, gov.agencyname.route.RouteOptimizer | |
| type | restful | When your agency integrates a third-party route optimizer through REST API, you must add these values and value descriptions. |
| url | Enter your restful url excluding parameters. For example, <i>http://www.bridgeview.gov/restful/route</i> | |

SALUTATION

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice allows users to enter professional or social titles for contacts and licensed professionals, such as Mr., Mrs., or Dr. Salutations must be 10 or fewer characters. The Standard Choice values populate in the Salutation drop-down list in the Contact, Licensed Professional, and Record portlets.

Standard Choice values include:

Mr.
Mrs.
Ms.
Dr.
Prof.

SESSION_TIMEOUT

Product

Civic Platform

Type

System Switch

Description

This Standard Choice specifies the session time-out value (in seconds) at the agency level and overrides the session time-out setting at the web server level.

Administrators can configure whether to display a session time-out warning to users, to warn that the session is timing out. Users can select Yes in the time-out warning to restart the session.

Table 121: SESSION_TIMEOUT Standard Choice Values

| Standard Choice Values | Value Description | Description |
|------------------------|---|---|
| TIMEOUT | Enter a number (of seconds). Default:7200. | The value defines the time period after which a Civic Platform session with no activity times out. If you specify a value less than 600 seconds, Civic Platform automatically enforces a session time-out period of 10 minutes. |
| TIMEOUT WARNING | Enter a number (of seconds). Default:120. | This value defines the advance time in seconds to pop up the session time-out warning. |

SG-PERCENTAGE_EXCLUDE_INVOICED_FEE

Product

Civic Platform

Type

System Switch

Description

When users add a fee item with the SG-PERCENTAGE calc formula to a record, Civic Platform calculates its fee based on the sum of the other fee items that belong to the same subgroup in the record. This Standard Choice defines whether to include all the fee items in the sum, or the fee items of the New status only, and also determines whether users can recalculate an "Invoiced" fee item of the SG-PERCENTAGE calc formula.

Standard Choice values include:

Yes. Civic Platform calculates the fee with the SG-PERCENTAGE calc formula based on the sum of the other fee items of the New Status that belong to the same subgroup. Besides, when users recalculate the

fees in a record, if the fee item of the SG-PERCENTAGE formula is in the Invoiced status, the recalculation does not change the value of the fee item.

No {Default}. Civic Platform calculates the fee based on the sum of all the other fee items that belong to the same subgroup. Besides, users can recalculate the fee item of the SG-PERCENTAGE formula even if the fee item is in the Invoiced status.

SINGLE_INVOICE_REPORT

Product

Civic Platform

Type

System Switch

Description

Administrators select this Standard Choice to indicate whether to enable a single invoice report.

Standard Choice values include:

{Specify the report name.}

SOCIAL_MEDIA_SETTINGS

Product

Civic Platform

Type

System Switch

Description

If you want to customize the application name (instead of "Civic Platform") displayed under the tweets, use this Standard Choice to register the consumer key and consumer secret you get from the Twitter site for the customized application.

Standard Choice values include:

TWITTER

Value Desc:

CONSUMER_KEY=<*** > ,CONSUMER_SECRET=<*******. Replace <*****> with the actual consumer key and consumer secret strings.

SPELL_CHECKER_ENABLED

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls the Spell Checker.

Standard Choice values include:

Yes. The Spell Checker is available for use in Civic Platform.

No. The Speck Checker is not available.

STANDARD_WEB_FONTS

Product

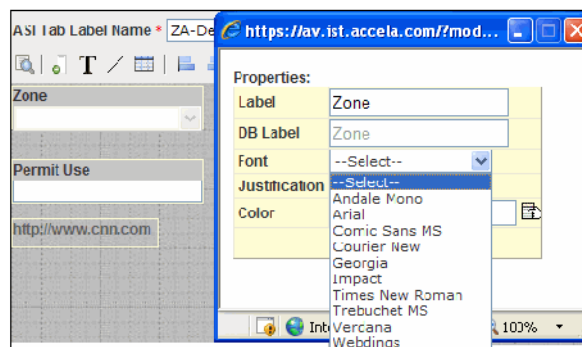
Civic Platform

Type

System Switch

Description

This Standard Choice enables custom fonts in the APO Form Layout Editor, ASI Form Layout Editor, Asset Form Layout Editor, and TSI Form Layout Editor. Civic Platform populates the choices in the Font drop-down list in the Properties window.



Standard Choice values can include:

- Andale Mono
- Arial
- Comic Sans MS
- Courier New
- Georgia
- Impact
- Times New Roman
- Trebuchet MS
- Verdana
- Webdings

STATES

Product

Citizen Access

Type

System Switch

Description

This Standard Choice populates the drop-down list of states. The Standard Choices values are the state names, such as California, Florida, Texas, or New York. You may run a script to populate all 50 states for this drop-down list.

STATUS_OF_CONDITIONS_OF_APPROVAL

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

This Standard Choice defines the status for conditions of approval. You define the Standard Choice values as the options in the status field for a condition of approval.

Standard Choice values can include:

{Enter a status names in each row.}

Pending

Met

Value Descriptions:

{Enter the status type Applied or Not Applied.}

Applied

Not Applied

STREET DIRECTIONS

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

This Standard Choice populates the drop-down list of street directions. The Standard Choices values are the directions, such as North, South, East, West, N, S, E, W, NE, NW, SE, SW.

STREET SUFFIXES

Product

Civic Platform, Citizen Access, Mobile Office

Type

System Switch

Description

This Standard Choice populates the drop-down list of street suffixes.

Standard Choice values can include:

Ave

Cir

Way

STRUCTURETYPE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice populates the drop-down list of the structure type.

Standard Choice values can include:

Primary

Secondary

Canal

Mall

STRUCTURE_APO_ASSOCIATION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls the auto-association of APO data when you associate an establishment with a structure.

Standard Choice values include:

Address

Establishment

Owner

Parcel

Structure

Value Desc:

Yes: Civic Platform automatically associates the object.

No: Civic Platform does not automatically associate the object.

Prompt: Civic Platform prompts the user to associate any related objects.

STRUCTURE_CAP_ASSOCIATION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls the automatic association of establishment, structure, and APO data to an application intake form when you search for an address, parcel, owner, structure, or establishment.

Standard Choice values include:

Address

Establishment

Owner

Parcel

Structure

Value Descriptions:

Yes: Civic Platform automatically associates any related objects.

No: Civic Platform does not automatically associate the object.

Prompt: Civic Platform prompts users to associate related objects, if any.

STRUCTURE_ESTABLISHMENT_APO_ASSOCIATION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls the auto-association of APO data to existing associated establishments when you associate APO data with their parent structure.

Standard Choice values include:

Address

Establishment

Owner

Parcel

Structure

Value Description:

Yes: Civic Platform automatically associates the object.

No: Civic Platform does not automatically associate the object.

Prompt: Civic Platform prompts the user to associate any related objects.

STRUCTURE_ESTABLISHMENT_LAND_USE

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines the land use values for structures and establishments.

Standard Choice values can include:

Commercial

Residential

STRUCTURE_ESTABLISHMENT_STATUS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice determines the structure and establishment status values.

Standard Choice values can include:

Existing

Proposed

TEMPLATE_EMSE_DROPDOWN

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice controls the ability to populate licensed professional template field information by calling an external web service and publishing the data to the field.

Standard Choice values:

ENABLE_EMSE

Value Description:

Yes. Enables the EMSE web service functionality.

No. Disables EMSE web service functionality. The default value is No.

TEMPLATE_TEXT_PARAMS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines agency-specific parameters that administrators can apply to display text in text settings. The Standard Choice value defines the parameter name, and the Value Desc defines the parameter value. If the display text contains the parameter name surrounded by the “\$\$” signs in text settings, the parameter value appears on the interface where the text settings are applicable.

TIME_ACCOUNTING_SETTINGS

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls whether the Equipment/Materials section is available for users to add equipment and material cost when creating a time accounting record.

Standard Choice values can include:

ENABLE_EQUIPMENT_LIST

Value Desc:

Yes. The Equipment/Materials section displays in the time accounting new form only when the Standard Choice Value ENABLE_EQUIPMENT_LIST = Yes.

TIME_MODULES

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls the drop-down menu that displays beside the time in Structures and Establishments records and indicates whether the time is a.m. or p.m.

Standard Choice values can include:

a.m.

p.m.

TRUST_ACCOUNT_ADMINISTRATOR

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the trust account administrator name and the email address for sending notifications regarding trust accounts. For example, you can set up a threshold amount in a trust account and automatically send a notification to the trust account administrator if the trust account balance falls below that threshold.

To set up a trust account receipt and an email notification for a low threshold amount, you must also configure the Content Customize function ([0184-Admin Content Customization](#)). Civic Platform sends email notifications to all email IDs listed in the Value Desc fields.

Standard Choice value can include:

{Enter the trust account administrator's name, in the form of Firstname Lastname, for example: Rocky Miyagi.}

Value Description:

{Enter the trust account administrator's email address, for example: Rocky.Miyagi@CityOfOakland.net.}

TRUST_ACCOUNT_ONLY

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls the ability to display a prompt so a user can choose to pay with a trust account or an alternative payment method.

Standard Choice values include:

Yes. Pays with a trust account only.

No. Provides the prompt to pay using an alternative payment method.

UNIT_DESC

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the value options for the types of workloads to use.

Standard Choice values can include:

Hours Worked

Pages Copied

UNIT_TYPES

Product

Citizen Access

Type

System Switch

Description

This Standard Choice populates the drop-down list in the Unit Type field in ACA.

Standard Choices values may include:

Apt.

Building

Suite

Unit

UPDATE_REFERENCE_CONDITION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines the reference condition configuration. This Standard Choice provides the ability to prompt the user to update reference conditions during the cloning of a record and saves the update as an ad-hoc in condition history.

Standard Choice values:

{Enter the condition type.}

Standard Choice values can include:

Yes - No Prompt: When selected and you override or unlock a condition on the daily side, if you update a reference condition a record, the action impacts all associated records with that reference condition, without a prompt.

Yes - Prompt: When selected and you override or unlock a condition on the daily side, the user receives a prompt, "Would you like to update the Reference Condition for all CAPs?" When selected, the user views a message, "Would you like to update Reference Condition for all Records?" If you choose Yes, the main reference condition updates all related records associated with it.

No: Civic Platform creates a disable and a history Ad hoc condition record. If you update a reference condition on a record, the reference overrides the individual record only. This function does not affect other records with the reference condition.

USER_DISCIPLINES

Product

Civic Platform, GIS

Type

System Switch

Description

This Standard Choice specifies the disciplines, or types that users can conduct, such as Building, Electrical, or Insulation inspections. The Standard Choice values determine the disciplines available on the Disciplines List page. You can assign an inspector to one or more disciplines through this page, when you define the user profile for the inspector.

If you are using GIS, the Standard Choice value must match the spelling of the associated GIS layer name as it displays on the GIS Map Viewer Table of Contents.

Standard Choice values can include:

Water

Electrical

Plumbing

USER_DISTRICTS

Product

Civic Platform, GIS

Type

System Switch

Description

This Standard Choice determines the user districts, or geographic areas, where users can conduct meetings or inspections, such as Flagstaff East or Flagstaff North. The Standard Choice values determine the districts available on the User Districts - Add From Standard Choices page. You can assign an inspector to one or more districts through this page, when you define the user profile for the inspector.

This Standard Choice value must follow the format:

<district type>-<district name>

If you are using GIS, the Standard Choice value must match the spelling of the associated GIS layer name as it displays on the GIS Map Viewer Table of Contents.

For example, if the GIS Layer Name is Fire District, the district type is Fire District, and the district name is 1, set the Standard Choice value to Fire District-1.

VAL_CALC_BY_RECORD_TYPE

Product

Civic Platform, Citizen Access

Type

System Switch

Description

This Standard Choice controls valuation calculator versioning, which enables users to track multiple versions of an occupancy code. Additionally, this Standard Choice controls the availability of the occupancy grouping feature. Agency administrators can group together and manage occupancy version information by creating an occupancy group.

This Standard Choice controls the default state of the Filter by Record Type option in the Valuation Calculator section of Civic Platform.

This functionality extends into public users of Citizen Access. When estimating fees for a record, public users can enter applicable parameters and can view fees based either on the Contractor Job value or on the valuation calculation results. This feature also includes the super agency level in Citizen Access. Administrators can decide whether the fees are calculated based on the higher or lower of the Contractor job value or the valuation calculation results through the Record Type Administration page or using EMSE scripting. As a pre-requisite to using this feature, administrators must associate some occupancy to the record type. The ApplicationSubmitAfter and FeeEstimateAfter4ACA EMSE events relate to each other.

Standard Choice values can include:

Yes. Select the Filter by Record Type option in the Valuation Calculator section.

No {or undefined}. Clear the Filter by Record Type option in the Valuation Calculator section.

VALUATION_CALCULATOR_VERSION

Product

Civic Platform

Type

System Switch

Description

This Standard Choice controls valuation calculator versioning, which enables users to track multiple versions of an occupancy code. Additionally, this Standard Choice controls the availability of the occupancy grouping feature. Agency administrators can group together and manage occupancy version information by creating an occupancy group.

You can use the ValuationCalculator_EMSE_Test.txt event script to change the logic of valuation calculator versioning.

Standard Choice values can include:

Yes

No

VEHICLE

Product

Civic Platform, Mobile Office

Type

System Switch

Description

This Standard Choice identifies the types of vehicles reported during one-time accounting.

Standard Choice values can include:

Motorcycle

Bicycle

Car

VOID_INVOICE_REASON

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines all possible options in the Reason field that users can select when voiding invoices. You can enter each possible reason as a Standard Choice value.

VOID_PAYMENT_REASON

Product

Civic Platform

Type

System Switch

Description

This Standard Choice defines all possible options in the Reason field that users can select when voiding payments. You can enter each possible reason as a Standard Choice value.

WITHOUT_INSPECTION_TIME

Product

Civic Platform, IVR

Type

System Switch

Description

This Standard Choice controls whether IVR or a third party IVR can schedule inspections without passing the scheduled start time to Civic Platform.

If administrators set the Standard Choice value to IVR, when users schedule or reschedule inspections with IVR, IVR does not deliver the scheduled start time to Civic Platform.

If you set the Standard Choice value to IVR, when users schedule or reschedule inspections with a third party IVR, the IVR system does not deliver the scheduled start time to Civic Platform, as long as the InspectionTime element is empty in the GovXML requests ScheduleInspection or RescheduleInspection.

Standard Choice values:

IVR

WO_TASK_DURATION_UNIT

Product

Civic Platform, Mobile Office

Type

System Switch

Description

This Standard Choice determines the anticipated unit of time needed to complete the task.

Standard Choice value can include:

Yes. The actual duration in daily work order tasks defaults to the same value as the estimate duration.

WO_TASK_DURATION_SAME_AS_DEFAULT

Product

Civic Platform

Type

System Switch

Description

Standard Choice values:

No. Leave the Actual duration default value as zero.

WO_CLOSE_CHECK_TASK

Product

Civic Platform

Type

System Switch

Description

Standard Choice values

Yes. Daily users cannot close a work order until the user marks all attached work order tasks as Complete.

WORKFLOW_FIDS

Product

Civic Platform

Type

System Switch

Description

Use this Standard Choice in conjunction with [APPLICATION_TYPE_SECURITY_FID](#) to limit users with Workflow Supervisor access (FID [8090-Workflow Supervisor](#) enabled). If your agency has users with Workflow Supervisor access, meaning the user has FID [8090-Workflow Supervisor](#) enabled, and you need to limit their access, you must list each functional area you want to restrict in both the [APPLICATION_TYPE_SECURITY_FID](#) and the WORKFLOW_FIDS Standard Choice.

WORKFLOW_CONFIGS

Product

Citizen Access

Type

System Switch

Description

This Standard Choice enables the ability to display the e-mail address associated with a workflow task to public users in the Record Processing Status area on the website.

Standard Choice value may include:

ACA_ENABLE_WF_DISP_EMAIL

Value Desc:

Yes. The Civic Platform workflow setting is marked to display an e-mail address for the record in ACA by default.

No. You define the setting to hide e-mail address associated with the record in ACA by default.

Function IDs Reference

This section contains a sequential list of Function IDs (FIDs). For each FID, the reference provides the following sections:

Version. Indicates the Civic Platform product version in which the FID first appeared.

Description. Provides an explanation of what the FID controls.

Interdependency. Lists other FIDs that inter-operate with the current FID, or have a parent relationship or child relationship to the current FID. FIDs with an inter-operate relationship jointly control a single function. Child FIDs depend on the parent FID, that is, a disabled parent prevents enablement of the affected child, regardless of the child setting.

Solution. The solution name associated with the FID.

Access. Provides the Civic Platform navigation path to the item controlled by the FID.

0004-Admin Users

Description

Enables the User administration function for administrators to create and manage users, including defining the user groups that users belongs to.

Interdependency

| | |
|----------------|------------------------|
| Interoperation | 0096-Admin User Groups |
|----------------|------------------------|

Solution

All

Access

Classic Admin Tools > User Profile > User

0005-Reference Property Parcels

Description

- Enables the Parcels portlet for users to create and manage reference parcels.
- Enables the Parcel tab in the Addresses portlet for users to associate parcels to addresses.
- Enables the Look Up and Delete buttons in the Parcels tab of the Structures & Establishments portlet, so users to look up reference parcels for structures and establishments.

Interdependency

| | |
|--------------|--|
| Child of #1 | 0089-Reference Property Owners |
| Child of #1 | 0109-Reference Genealogy Split/Merge |
| Child of #1 | 0295-Reference Structure and Establishment |
| Child of #1 | 0239-Activities For People and Property |
| Parent of #2 | 0006-Reference Property Addresses |

Parent of #3

0295-Reference Structure and Establishment

Solution

All

Access

Parcels portlet

Addresses portlet > Parcel tab

0006-Reference Property Addresses

Description

- Enables the Addresses portlet for users to create and manage reference address information.
- Enables the Address tab (including the Look Up, New, Delete, Submit, Cancel and GIS buttons) in the Parcels portlet for users to manage addresses for parcels, and copy or move associated reference addresses between genealogically related reference parcels.
- Enables the Address tab in the Contacts portlet for users to manage reference addresses for contacts.
- Enables the Look Up and Delete buttons in the Addresses tab of the Structures & Establishments portlet, so users to look up reference addresses for structures and establishments.

Interdependency

| | |
|----------------------|---|
| Interoperation of #1 | 0069-Reference Condition Addresses |
| Parent of #2 | 0005-Reference Property Parcels |
| Child of #1 | 0277-Address Type for the reference address |
| Child of #1 | 0321-Reference Address Copy |
| Child of #1 | 8388-Reference Address Comments |
| Child of #1 | 0239-Activities For People and Property |
| Interoperation of #3 | 0344-Show Address on the Contact |
| Parent of #4 | 0295-Reference Structure and Establishment |

Solution

All

Access

Addresses portlet

Parcels portlet > Address tab

Contacts portlet > Address tab

0008-Reference Licensed Professionals

Description

- Enables the Licensed Professionals portlet for users to add and manage licensed professionals.

- Enables the Look Up and Delete buttons in the Owners tab of the Structures & Establishments portlet, so users to look up owners for structures and establishments.
- Enables the Associate Licensed Professional button in the Associated People tab of the Trust Account portlet, so users can associate licensed professionals to a trust account.

Interdependency

| | |
|--------------|---|
| Child of #1 | 0323-Disable Licensed Professionals Search |
| Child of #1 | 8330-People Info Table |
| Child of #1 | 8389-Reference Licensed Professional Comments |
| Child of #1 | 0283-Associated CAP List |
| Child of #1 | 0239-Activities For People and Property |
| Parent of #2 | 0295-Reference Structure and Establishment |
| Parent of #3 | 0278-Associate People |

Solution

All

Access

Licensed Professionals portlet

0025-Admin Workflow Email Settings

Version

5

Description

Enables the eMail Setting administration function of workflow for administrators to specify the combination of a workflow process, task, and status that generates an email message. Administrators can choose which email message to send when this combination occurs, and determine the recipient of the email message.

Interdependency

| | |
|----------------|------------------------------------|
| Interoperation | 0026-Admin Workflow Email Messages |
|----------------|------------------------------------|

Solution

All

Access

Classic Admin Tools > Workflow > eMail Setting

0026-Admin Workflow Email Messages

Description

Enables the email message administration function of workflow for administrators to compose email messages that they can deliver to specific recipients when a certain task reaches a certain status.

Interdependency

| | |
|-------|------------------------------------|
| Child | 0025-Admin Workflow Email Settings |
|-------|------------------------------------|

Solution

All

Access

Classic Admin Tools > Workflow > eMail Message

0027-Workflow Email Override

Information about this item is unavailable at this time.

0036-Admin Workflow Processes

Description

Enables the Process administration function for administrators to manage workflow processes and configure workflow tasks in the processes.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Workflow > Process

0043-Tickler

Description

Enables the Tickler and Tickler Collection daily functions in Civic Platform Classic, so users can configure and manage ticklers (pre-defined search in database for certain tasks).

Interdependency

None

Solution

All

Access

Classic Daily > SmartManager > Tickler

Classic Daily > SmartManager > Tickler Collection

0044-User Preferences

Description

Enables the Preference tab in the Preference portlet for users to set up Civic Platform preferences.

Interdependency

None

Solution

All

Access

Preference portlet > Preference tab

0045-Admin Organizational Hierarchy

Description

Enables the Organization administration function for administrators to define organization hierarchy, translating agency's departments into organization structures.

Interdependency

None

Solution

All

Access

Classic Admin Tools > User Profile > Organization

0047-Admin Fee Payment Periods

Description

Enables the Payment Period administration function for administrators to configure and manage payment periods. Payment periods can indicate which module a user is working in, or act as flags during batch processing. Payment periods help manage which fees apply to an application, and when.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Fees > Payment Period

0048-Reference Hearing Locations

Description

Enables the Hearing Location administration function for administrators to add reference hearing locations.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Calendar > Location

0049-Reference Hearing Bodies

Description

Enables the Hearing Body administration function for administrators to add reference hearing bodies.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Calendar > Hearing Body

0050-Reference Hearing Calendar (old)

Description

Enables the Hearing Calendar administration function for administrators to create hearing calendar items in Civic Platform Classic.

Interdependency

Interdependency 0183-Reference Hearing Calendar

Civic Platform ignores the setting of FID 0050 if you enable FID 0183. When you disable FID 0183 but enable FID 0050, the calendar item edit page provides the fields differently than when you enable FID 0183.

Solution

All

Access

Calendar > Hearing Calendar

0054-Admin Condition Types

Description

Enables the Condition Type administration function for administrators to create and manage condition types.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Condition > Condition Type

0055-Admin Condition Status

Description

Enables the Condition Status administration function for administrators to create and manage condition statuses.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Condition > Condition Status

0056-Admin Condition Reference

Description

Enables the Standard Condition administration function for administrators to create and manage standard conditions.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Condition > Standard Condition Type

0057-Reference Condition Parcels

Description

- Enables the Conditions tab in the Parcels portlet for users to add and manage conditions for parcels.
- Enables the Copy and Move buttons in the Conditions tab of the Parcels portlet for users to copy or move associated conditions between genealogically related reference parcels.

Interdependency

Child of #1

0209-Reference Parcel Condition History

Solution

All

Access

Parcels portlet > Conditions tab

0058-Admin Workflow Condition Validation

Description

Enables the Process Validation administration function of conditions for administrators to extend the condition 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.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Condition > Process Validation

0059-Admin Fees Valuation Calculation

Description

Enables the Valuation Calculator admin tool for administrators to configure and manage the valuation calculations that they can associate with any given ASI field, system defined information field, or Job cost field in an Application Intake form.

Interdependency

If you enable the Standard Choice VALUATION_CALCULATOR_VERSION, clicking the Valuation Calculator link in Classic Admin opens the valuation calculator - occupancy portlet in Vantage360.

Solution

All

Access

Classic Admin Tools > Fees > Valuation Calculator

0060-Admin Fees Regional Modifier

Description

Enables the Regional Modifier administration function for administrators to define the region and the increment for fee adjustment.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Fees > Regional Modifier

0061-Admin SmartChoice Code

Description

Enables the SmartChoice Group administration function for administrators to configure SmartChoice group code to associate with application types. The SmartChoice group code determines the information to include in the application intake form.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Application > SmartChoice Group

0063-Admin Workflow Task Status

Version

2.5

Description

Enables the Task Status administration function of workflow for administrators to create and manage task statuses.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Workflow > Task Status

0065-Admin Application Types

Version

2.51

Description

- Displays the Record Type portlet for administrators to configure record types.
- Displays the Enable For ACA check boxes in an application type configuration, so administrators can set the application type to display in Citizen Access, making the information available online.
- Displays the Document Code for ACA field in an application type configuration on the condition enabled for FID 0108 Admin Document Type.
- Enables the Record Type Security portlet for administrators to control access to different application types based on agency privileges and group privileges.

Interdependency

| | |
|----------------------|--------------------------|
| Parent of #1 | 0318-Administration |
| Child of #2 | 0244-Fee Estimation |
| Interoperation of #2 | 0075-Admin License Types |
| Interoperation of #3 | 0108-Admin Document Type |

Solution

All

Access

Setup portlet > Administration > AA Admin > Record Type

Setup portlet > Administration > AA Admin > Record Type > (Selecting a record type) Edit

Setup portlet > Application > Record Type Security

0068-Admin Fee Item Sets

Version

4

Description

Enables the Fee Items administration function for administrators to configure and manage fee items.

Interdependency

| | |
|----------------|---------------------------------|
| Interoperation | 0181-Admin Fees Manage Schedule |
|----------------|---------------------------------|

Solution

All

Access

Classic Admin Tools > Fees > Fee Items

0069-Reference Condition Addresses

Description

- Enables to display the address search results when users click the Submit button in the search form of the Addresses portlet.
- Enables the Conditions tab in the Addresses portlet for users to add and manage conditions for addresses.

Interdependency

| | |
|----------------------|--|
| Interoperation of #1 | 0006-Reference Property Addresses |
| Child of #2 | 0208-Reference Address Condition History |

Solution

All

Access

Addresses portlet > Search form > (After clicking the Submit button) Search results

Addresses portlet > Conditions tab

0070-Reference Condition Licensed Professionals

Description

Enables the Condition tab in the Licensed Professionals portlet for users to manage conditions for licensed professionals.

Interdependency

Child | 0211-Reference Licensed Professional Cond. History

Solution

All

Access

Licensed Professionals portlet > Conditions tab

0071-Admin Workflow Final Inspection

Description

Enables the Final Inspection button in the Application Type administration function, so administrators can define the final inspections for workflow tasks.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Application > Application Type > (Below the Application Type list) Final Inspection button

0072-Admin App Spec Info

Obsolete. Use FID 0179 instead.

0073-Admin Application Renewal Info

Description

Enables the Renewal Info administration function for administrators to establish renewal information such as the expiration date, renewal process, and penalty periods for business licenses.

Interdependency

None

Solution

License

Access

Classic Admin Tools > Application > Renewal Info

0074-Admin License Fee Payment Period

Information about this item is unavailable at this time.

0075-Admin License Types

Description

Displays the Velocity Hall settings instead of Enable For ACA check boxes in an application type configuration.

Interdependency

None

Interdependency

Interoperation | 0065-Admin Application Types

Solution

All

Access

Setup portlet > Administration > AA Admin > Record Type > (Selecting a record type) Edit

0076-Accela Events

Description

Enables the event administration function for super agency administrators to perform the following tasks:

- Add, update or delete events
- Add, update or delete event parameters
- View event logs by time period

Interdependency

None

Solution

SuperAgency

Access

Classic Admin Tools > Agency Profiles > Events

0077-Admin Event Setup

Description

Enables the Events administration function for administrators to manage the association between events and scripts.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Events > Events

0078-Admin Event Script Setup

Description

Enables the Script administration function for administrators to add scripts, search scripts, or edit scripts.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Events > Scripts

0079-Admin Event Script Test

Description

Enables the Script Test administration function for administrators to select and test scripts.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Events > Test Script

0080-Admin Rbizdomain Maintenance

Description

Enables the Standard Choices administration function for administrators to add and manage Standard Choice settings.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Agency Profile > Standard Choices

0081-Admin Calendar Events

Obsolete.

0082-Reference Structure

Description

Enables the Structure administration function for administrators to define structures.

Interdependency

Child | 0194-Access Structure Conditions

Solution

All

Access

Classic Admin Tools > Property > Structure

0083-Reference Structure Template

Description

Enables the Structure Template administration function for administrators to define structure templates.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Property > Str Template

0084-Reference People Contact

Description

- Enables the Contacts portlet for users to add and manage contacts, including the following tabs: Contact Detail, Contact Address, Related Contacts, Conditions, Record List, Activity, Associated Public User, and Assets.
- Enables the Associate Contact button in the Associated People tab of the Trust Account portlet, so users can associate contacts to a trust account.
- Enables the Sync to the Reference button in the Contacts tab, for users to synchronize the information about a daily contact to its reference.
- Enables the Also Known As tab in the Contacts portlet for users to manage the Also Known as names of reference contacts.

Interdependency

| | |
|--------------|---|
| Child of #1 | 8102-People User Defined Attribute |
| Child of #1 | 0322-Reference Merge Contacts |
| Child of #1 | 0239-Activities For People and Property |
| Parent of #2 | 0278-Associate People |

Solution

All

Access

Contacts portlet

Contacts portlet > Also Known As tab

Record portlet > Contacts tab

Trust Account portlet > Associated People tab > Associate Contact button

0085-Admin APO Template

Description

Enables the APO Template administration function for administrators to configure user-defined attributes for addresses, parcels and owners.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Property > APO Template

0086-Admin Agency Online Help

Description

Enables the OnlineHelp administration function for administrators to define and manage custom help documents. A help document can be an HTML file, PDF file, text file, Word document, website, or any other file type that the browser supports.

Interdependency

None

Solution

All Modules

Access

Classic Admin Tools > Help > OnlineHelp

0087-Accela Online Help

Description

Enables the Online Help administration function for superagency administrators to view the existing help documents, and add more if necessary.

Interdependency

None

Solution

Superagency

Access

Classic Admin Tools > Agency Profile > OnlineHelp

0088-Admin People User Defined Attributes

Description

Enables the People Template administration function for administrators to configure templates as additional fields for licensed professionals and contacts.

Interdependency

None

Solution

All

Access

Classic Admin Tools > People > People Template

0089-Reference Property Owners

Description

- Enables the Owner portlet for users to create and manage reference owner information.
- Enables the Owner tab in the Parcels and Structures & Establishments portlet for users to manage owners for parcels, and copy or move associated reference owners between genealogically related reference parcels.

Interdependency

| | |
|--------------|---|
| Parent of #2 | 0005-Reference Property Parcels |
| Child | 0239-Activities For People and Property |

Solution

All

Access

Owner portlet

Parcels portlet > Owner tab

Structures and Establishments portlet > Owner tab

0092-Accela Functions

Version

3.7

Description

Enables the Functions administration function for superagency administrators to search and view the FID list and the FID basic information.

Interdependency

None

Solution

Superagency

Access

Classic Admin Tools > Agency Profile > Functions

0093-Accela Release Versions

Version

3.7

Description

Enables the Version administration function for superagency administrators to view the Civic Platform version information, and maintain the list of modules for each solution.

Interdependency

None

Solution

Superagency

Access

Classic Admin Tools > Agency Profile > Version

0094-Accela Agency

Version

3.7

Description

Enables the Agency administration function for superagency administrators to create and manage agency settings.

Interdependency

None

Solution

Superagency

Access

Classic Admin Tools > Agency Profile > Agency

0095-Accela Agency Functions

Version

3.7

Description

Enables the Agency Functions administration function for superagency administrators to view and change the Function Identification (FID) settings for agencies (do not change the basic functions, but only to enable or disable optional functions). If you disable a FID for an agency, it is invisible to all the user groups in the agency.

Interdependency

None

Solution

Superagency

Access

Classic Admin Tools > Agency Profile > Agency Functions

0096-Admin User Groups

Version

3.7

Description

Enables the User Group administration function for administrators to create and manage user groups, including assigning FIDs to user groups.

Interdependency

Interoperation | 0004-Admin Users

Solution

All

Access

Classic Admin Tools > User Profile > User Group

0097-Admin Workflow Review Activity

Version

4

Description

Enables the Activity administration function of workflow for administrators to configure activities for specific workflow processes and tasks.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Workflow > Activity

0098-Reference Standard Comments

Version

4.0

Description

Enables the Std Comment administration function for administrators to view and configure standard comments in Civic Platform Classic.

Interdependency

Interdependency | 0290-Admin - Standard Comments

If you enable FID 0290, the Std Comment administration page in Civic Platform Classic displays the Standard Comments administration portlet from Civic Platform Vantage360. Otherwise, the Std Comment administration page displays the legacy configuration page.

Solution

All

Access

Classic Admin Tools > Agency Profile > Std Comment

0099-Admin Oracle Reports

Version

3.8

Description

Enables the Oracle Report administration function for administrators to view and add Oracle reports in Civic Platform Classic.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Agency Profile > Oracle Report

0106-Admin Batch job

Version

3.7

Description

Any of the following FIDs can enable the Batch Engine administration portlet:

- 0106-Admin Batch job (the list portlet, the Job Detail tab, Job Schedule tab, and Log tab)

- 0284-Batch Job Maintenance (the list portlet and the Job Detail tab) and 0285-Batch Job Schedule (the Job Schedule tab and the Log tab)
- 8122-Batch Job (the list portlet, the Job Detail tab, Job Schedule tab, and Log tab)
- 8049-Batch Job (old) (the list portlet, the Job Detail tab, Job Schedule tab, and Log tab)

Interdependency

| | |
|----------------|----------------------------|
| Interoperation | 0284-Batch Job Maintenance |
| Interoperation | 8122-Batch Job |
| Interoperation | 8049-Batch Job (old) |

Solution

All

Access

Setup portlet > System Tools > Batch Engine

Batch Jobs portlet

0107-Admin GIS Service

Version

5

Description

Enables the GIS Service administration function for administrators to configure and manage GIS services.

Interdependency

| | |
|-------|------------------|
| Child | 0243-GIS Service |
|-------|------------------|

Solution

All

Access

Classic Admin Tools > GIS > GIS Service

0108-Admin Document Type

Version

6.1.1

Description

- Enables the Attachments administration function for administrators to perform the following tasks:
 - Create and manage document groups for organizing different types of documents that users can add to certain applications
 - Add document types to document groups and set properties for each document type
- Displays the Document Code for ACA field in an application type configuration on the condition for which you enable FID 0065 Admin Application Type.

Interdependency

Interoperation with #2 | 0065-Admin Application Types

Solution

All

Access

Classic Admin Tools > Attachments > Document

Classic Admin Tools > Application > Application Type > Application Category - Edit

0109-Reference Genealogy Split/Merge

Version

3.8

Description

- Enables the Merge and Split buttons in the Parcels portlet for users to split a parent parcel into multiple descendents, or merge parcels together in a “spousal” relationship, or combine multiple parcels into a single descendent.
- Enables the Genealogy Summary tab in the Parcels portlet for users to view and operate the parcel genealogy.

When set to full access, Civic Platform automatically sets FID 0005 Reference Property Parcels, FID 0006 Reference Property Addresses, FID 0089 Reference Property Owners, and FID 8281 Inspector Districting to full access. This way, users can split and merge reference parcels in Civic Platform.

Interdependency

Parent | 0005-Reference Property Parcels

Solution

All

Access

Parcels portlet > Merge, Split buttons

Parcels portlet > Genealogy Summary tab

0110-Reference Owner Condition

Version

3.8

Description

Enables the Conditions tab in the Owners portlet for users to add and manage conditions for owners.

Interdependency

Child | 0210-Reference Owner Condition History

Solution

All

Access

Owners portlet > Conditions tab

0111-Admin GIS Dynamic Themes

Version

5

Description

Enables the Dynamic Theme administration function for administrators to configure GIS query themes.

Interdependency

None

Solution

All

Access

Classic Admin Tools > GIS > Dynamic Theme

0112-Admin Workflow

Version

4.1

Description

Enables the Workflow administration function for administrators to define and manage workflow hierarchy.

Interdependency

Child

| 0249-Workflow Edit

Solution

All

Access

Classic Admin Tools > Workflow > Workflow

0115-Reference Calendar Structure

Version

3.9

Description

Enables the Structure as a calendar type in the calendar management in Civic Platform Classic, so users can configure structure calendars.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Calendar > Calendar > Structure option in Type field

0116-Admin Calendar Structure Blockout

Version

3.9

Description

Enables the Structure Blockout as a calendar type in the calendar management in Civic Platform Classic, so users can configure structure blockout calendars.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Calendar > Calendar > Structure Blockout option in Type field

0117-Admin Calendar Inspection Blockout

Version

3.9

Description

Enables the Inspection Blockout as a calendar type in the calendar management in Civic Platform Classic, so users can configure inspection blockout calendars.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Calendar > Calendar > Inspection Blockout option in Type field

0118-Admin GIS Search Tools

Version

5

Description

Enables the GIS Search Fields administration function for administrators to configure the search fields applicable in GIS Search.

Interdependency

None

Solution

All

Access

Classic Admin Tools > GIS > GIS Search Fields

0119-Admin Citation Number Generator

Information about this item is unavailable at this time.

0120-Accela Login Page Navigation Link Maintenance

Version

4

Description

Enables the Login Page Links administration function for superagency administrators to maintain login page navigation links.

Interdependency

None

Solution

Superagency

Access

Classic Admin Tools > Agency Profile > Login Page Links

0121-Admin Agency Announcements

Version

4

Description

Enables the Announcement administration function for administrators to define and manage announcements that display in a pop-up window after a user logs on to Civic Platform.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Help > Announcements

0122-Accela System Announcements

Version

4

Description

Enables the Announcements administration function for superagency administrators to configure system announcements.

Interdependency

None

Solution

Superagency

Access

Classic Admin Tools > Agency Profile > Announcements

0123-Admin Inspection Result Group

Version

4.2

Description

Enables the Inspection Result Group administration function for administrators to configure and manage inspection result groups.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Inspection > Inspection Result Group

0124-Admin Inspection Guide Sheet

Version

4.2

Description

Enables the Inspection Guide Sheet function for administrators to create and manage inspection guide sheets.

Interdependency

Child

| 0291-Guide Sheet Template Data

Solution

All

Access

Classic Admin Tools > Inspection > Guide Sheet

0125-Admin Inspection Guide Sheet Group

Version

4.2

Description

Enables the Guide Sheet Group function for administrators to create and manage inspection guidesheet groups.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Inspection > Guide Sheet Group

0127-Admin Application Status Group

Version

4

Description

Enables the Application Status Group administration function for administrators to create and manage application status groups that apply to specific types of applications.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Application > Application Status Group

0128-Accela User Profile Replace Password

Version

4

Description

Enables the Replace Password administration function for superagency administrator to set a new password for an agency user.

Interdependency

None

Solution

Superagency

Access

Classic Admin Tools > Agency Profile > Replace Password

0129-Admin GIS Feature

Version

5

Description

Enables the GIS Feature administration function for administrators to view and manage all the GIS features, and configure the genealogy.

Interdependency

None

Solution

All

Access

Classic Admin Tools > GIS > GIS Feature

0130-Admin GIS Establish Genealogy

Version

5

Description

Enables the GIS Establish Genealogy administration function for administrators to configure the genealogy between GIS objects.

Interdependency

None

Solution

All

Access

Classic Admin Tools > GIS > Establish Genealogy

0131-Admin Find App (Custom)

Version

5

Description

Enables the Find Application Profile administration function for administrators to customize the advanced application search window and results window for different user groups.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Application > Find Application Profile

0133-Admin Inspection Type Sets

Version

4.2

Description

Enables the Inspection Group and Type administrator function for administrators to search inspection groups and inspection types, and configure inspection groups and inspection types.

Interdependency

| | |
|-------|---|
| Child | 0218-Admin Auto-Assign Inspection |
| Child | 0288-Enable Inspection Flow |
| Child | 0289-Enable Inspection Milestone |
| Child | 0232-Admin display Option/Required column |
| Child | 0229-Admin display Department |

Solution

All

Access

Classic Admin Tools > Inspection > Inspection

0134-Admin-Message-General

Version

4

Description

Enables the Announcements portlet for administrators to configure and manage messages to display in Civic Platform and/or Citizen Access.

Interdependency

| | |
|-------|-------------------------------|
| Child | 0135-Admin-Message-Supervisor |
|-------|-------------------------------|

Solution

All

Access

Setup portlet > Communication Manager > Announcements

0135-Admin-Message-Supervisor

Version

4

Description

Enables the Assign Agency, Assign Module, and Assign Group buttons in the Recipient tab of the Announcements administration portlet, so administrators can manage messages in all agencies.

Interdependency

| | |
|--------|----------------------------|
| Parent | 0134-Admin-Message-General |
|--------|----------------------------|

Solution

All

Access

Setup portlet > Communication Manager > Announcements > Recipient tab > Assign Agency, Assign Module, and Assign Group buttons

0136-Admin Application General Profile

Version

4.1

Description

Enable the General Profile administration function for administrators to configure what the daily activities application window look like. The profiles affect application summary windows and search windows, as well as application headers.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Application > General Profile

0137-Admin Filter View

Version

4.1

Description

- Enables the Form Portlet Designer administration function for administrators to configure the forms and lists for their agency users.
- Enables the Edit View menu item in list and form portlets for users to customize the layout.

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > Form Portlet Designer

List and form portlets (such as Record portlet, Professionals portlet) > Menu button > Edit View button

0139-Admin-DataFilter/QuickQuery

Version

4.1

Description

- Enables the Data Filter portlet for administrators to restrict the data that display in lists or forms for certain users.
- Enables the Global QuickQueries portlet for administrators to define quickqueries and assign them to users, or user groups.

- Enables the My QuickQueries portlet for administrators to view and manage the quickqueries created by agency users.

Interdependency

Child of #3

| 0327-Edit My QuickQuery By Administration

Solution

All

Access

Setup portlet > Data Filter & Query > Data Filter

Setup portlet > Data Filter & Query > Global QuickQueries

Setup portlet > Data Filter & Query > My QuickQueries

0142-Admin Agency Security Policies

Version

5

Description

- Enables the ACA Admin portlet for administrators to configure and design the Citizen Access website.
- Enables the ASI Security portlet for administrators to perform the following tasks:
 - View or assign users' access to certain ASI data and ASI table data
 - Forbid users from accessing to certain ASI data and ASI table data

Assigns security permissions based on the user login at the Agency, Module, User Group, and User levels.

- Enables the Inspection Type Security portlet for administrators to establish security levels for inspection types.

Interdependency

None

Solution

Land/Building/Licenses/Enforcement/AMS

Access

Setup portlet > Administration > ACA Admin

Setup portlet > Application > ASI Security

Setup portlet > Inspection > Inspection Type Security

0143-Admin Workflow Task Spec Info

Version

6

Description

Enables the Task Specific Info administration function of workflow for administrators to create and manage task-specific information groups to include on tasks, in addition to the standard task fields.

Interdependency

| | |
|-------|--|
| Child | 0180-Admin Workflow Task Spec Info Subgroups |
|-------|--|

Solution

All

Access

Classic Admin Tools > Workflow > Task Specific Info

0144-Admin Agency Dynamic Menu

Information about this item is unavailable at this time.

0145-Admin Report Management

Version

5

Description

Enables the Report Management administration function (available as a link) for administrators to manage reports from Civic Platform Classic.

Report Management
[Report Management](#) [Auto Report](#) [Report Manager Admin](#)
Help
[Help Documents](#) [Announcements](#)
GIS
[Dynamic Theme](#) [Reference User Parameter](#) [GIS Search Fields](#)
[GIS Service](#) [GIS Feature](#) [Establish Genealogy](#) [Proximity Alerts](#)
[GIS Map Object Attribute Mapping](#)
Interdependency

| | |
|-----------------|------------------------------------|
| Interdependency | 0226-Reports Manager Admin |
| Child | 0193-Report Management Auto Report |

Solution

All

Access

Classic Admin Tools > Report Management link

0146-Admin Folder Admin

Information about this item is unavailable at this time.

0147-Accela DB Admin

Version

5.0

Description

Enables the Manage Data Sources tool in the Report Management portlet, so super agency administrators can configure the data sources for reports.

Interdependency

None

Solution

Superagency

Access

Classic Daily > Report > Report Management > Tools tab > Manage Data Source

0148-Admin Report Admin

Information about this item is unavailable at this time.

0149-Admin Universe Admin

Information about this item is unavailable at this time.

0150-Admin Workload and Skillset

Version

6

Description

- Enables the Workload portlet for administrators to create and manage workloads that Civic Platform uses to determine which skillset to assign the work to.
- Enables the Skillset portlet for administrators to set up the available skillsets, so Civic Platform can assign appropriate workloads to the department or employee with the best skillset necessary to perform the work.

Interdependency

None

Solution

All

Access

Setup portlet > Workflow & Activity > Workload

Setup portlet > Workflow & Activity > Skillset

0151-Admin Alert and Rules

Version

1

Description

Enables the Alert and Rule portlet for administrators to perform the following tasks:

- View the existing user-defined alerts and rules
- Create or delete user-defined alerts and rules
- Assign recipients of alerts and rules

Interdependency

None

Solution

All

Access

Setup portlet > Communication Manager > Alert

Setup portlet > Communication Manager > Rule

0152-Admin IntelliScript

Version

1

Description

Enables the IntelliScript portlet for IntelliScript integration.

Interdependency

None

Solution

All

Access

IntelliScript portlet

0153-Reference GIS Proximity Alerts

Version

5.1

Description

Enables the GIS Proximity Alerts administration function for administrators to configure GIS proximity alerts.

Interdependency

None

Solution

All

Access

Classic Admin Tools > GIS > Proximity Alerts

0154-Reference Workflow Proximity Alerts

Version

5.1

Description

Enables the Proximity Alerts administration function of workflow for administrators to assign proximity alerts to workflow tasks.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Workflow > Proximity Alerts

0155-Admin Label Configuration

Version

5.1

Description

Enables the Text Settings portlet for administrators to perform the following tasks:

- View the existing text settings
- Create text settings that replace existing display text such as messages and dialog boxes with customized text.
- Delete text settings.

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > Text Settings

0156-Admin SmartChart Configuration

Version

5.1

Description

Enables the SmartCharts portlet for administrators to perform the following tasks:

- View existing SmartChart settings
- Add new SmartCharts and assign them to user groups
- Delete SmartCharts which are no longer in use

Interdependency

| | |
|----------------|---|
| Interoperation | 0157-Admin SmartChart Query Configuration |
|----------------|---|

Solution

All

Access

Setup portlet > Report > SmartCharts

0157-Admin SmartChart Query Configuration

Version

5.1

Description

Enables the SmartChart Queries portlet for administrators to create and manage SmartChart Queries.

Interdependency

| | |
|----------------|-------------------------------------|
| Interoperation | 0156-Admin SmartChart Configuration |
|----------------|-------------------------------------|

Solution

All

Access

Setup portlet > Report > SmartChart Queries

0158-Admin Attribute Definition

Version

5.1

Description

- Enables the Attribute administration portlet for both assets and structures & establishments, so administrators can configure attributes in addition to standard fields.
- Enables the Attributes tab in the Attribute Template administration portlet for both assets and structures & establishments, so administrators can associate attributes with attribute templates.

Interdependency

| | |
|--------------|--|
| Parent of #2 | 0159-Admin Attribute Template Definition |
| Parent of #2 | 0294-Structure and Establishment |

Solution

Accela Asset Management

Access

Setup portlet > Assets > Attribute

Setup portlet > Assets > Attribute Template > Attributes tab

Setup portlet > Structures & Establishments > Attribute

Setup portlet > Structures & Establishments > Attribute Template > Attributes tab

0159-Admin Attribute Template Definition

Version

5.1

Description

- Enables the Attribute Template administration portlet for assets, so administrators can configure attribute templates.
- Enables the Attribute Template administration portlet for structures & establishments, so administrators can configure attribute templates. Controls the Template link under the Structures and Establishments link in the Admin Setup menu.

Interdependency

| | |
|--------------|---------------------------------------|
| Child | 0158-Admin Attribute Definition |
| Child | 0305-Admin Attribute Table Definition |
| Parent of #2 | 0294-Structure and Establishment |

Solution

Accela Asset Management

Access

Setup portlet > Assets > Attribute Template

Setup portlet > Structures & Establishments > Attribute Template

0160-Admin AMS Asset Definition

Version

5.1

Description

Enables the Asset Type administration portlet for users to perform the following tasks:

- View the existing asset type definitions
- Create, search, edit and delete asset types

Interdependency

| | |
|-------|------------------------------------|
| Child | 0253-Asset GIS Synchronize |
| Child | 0252-Asset Type Available CAP Type |

| | |
|----------------|-----------------------------------|
| Child | 0326-Define Asset Usage Unit Type |
| Child | 0182-Admin GIS Attribute Mapping |
| Interoperation | 0274-Rating Type |

Solution

Accela Asset Management

Access

Setup portlet > Assets > Type

0161-Admin Work Order Costing Item Definition

Version

5.1

Description

- Enables the Cost Item portlet for administrators to define and manage cost items.
- Enables the Cost Item tab in the Cost Group portlet for administrators to manage cost items in a cost group.

Interdependency

| | |
|--------------|--|
| Child | 0332-Daily Cost Rate Definition |
| Parent of #2 | 0330-Admin Work Order Costing Group Definition |

Solution

Accela Asset Management

Access

Setup portlet > Work Orders > Cost Item

0162-Admin Work Order Parts Definition

Obsolete.

0163-Admin Work Order Tools Definition

Obsolete.

0164-Admin Links Portlets

Version

5.1

Description

- Enables the Link Portlets portlet for administrators to perform the following tasks:
 - View the existing link portlets
 - Create more link portlets that contain links to URLs or to other portlets
 - Delete link portlets if necessary
- Enables the Portlet portlet for administrators to create their own portlets.

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > Link Portlets

Setup portlet > Agency Profile > Portlet

0169-Admin-Work Order Template

Version

6.1

Description

Enables the Work Order Template portlet for administrators to perform the following tasks:

- View the work order template list
- Search, modify, create, or delete work order templates

Interdependency

| | |
|----------------|--------------------------------|
| Child | 0170-Admin-WO Template Costing |
| Child | 0173-WO Template Part |
| Interoperation | 0254-WO Task Definition |

Solution

Accela Asset Management

Access

Setup portlet > Work Orders > Work Order Template

0170-Admin-WO Template Costing

Version

6.1

Description

Enables the Costing tab in the Work Order Template portlet for administrators to perform the following tasks:

- View the costing added to the current work order template

- Look up costing and add the selected to the work order template
- Delete costing from the work order template

Interdependency

Parent | 0169-Admin - Work Order Template

Solution

Accela Asset Management

Access

Setup portlet > Work Orders > Work Order Template > Costing tab

0173-WO Template Part

Version

6.2

Description

Enables the Part tab in the Work Order Template portlet for administrators to perform the following tasks:

- View the parts associated to work order templates
- Look up parts and associate one or more with work order template
- Delete the association between parts and work order templates

Interdependency

Parent | 0169-Admin - Work Order Template

Solution

Accela Asset Management

Access

Setup portlet > Work Orders > Work Order Template > Part tab

0175-Admin App Spec Info Groups

Obsolete.

0179-Admin App Spec Info Subgroups

Version

6

Description

Enables the Application Spec Info function for administrators to configure ASI groups.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Application > Application Spec Info

0180-Admin Workflow Task Spec Info Subgroups

Version

6

Description

Enables task-specific info subgroups in the Task Specific Info administration function of workflow for administrators to create and assign task-specific information subgroups to task-specific information groups.

Interdependency

If you disable FID 0143 and enable FID 0180, the Task Specific Info administration function works.

Solution

All

Access

Classic Admin Tools > Workflow > Task Specific Info

0181-Admin Fees Manage Schedule

Version

6

Description

- Enables the Manage Schedule administration function for administrators to manage fee schedules by modules.
- Enables the Fee Schedule drop-down list in the Fee Item-Add page for administrators to associate a fee schedule with a fee item.

Interdependency

| | |
|----------------|--------------------------|
| Interoperation | 0068-Admin Fee Item Sets |
|----------------|--------------------------|

Solution

All

Access

Classic Admin Tools > Fees > Manage Schedule

Classic Admin Tools > Fees > Fee Items > Add button (to open the Fee Item-Add page) > Fee Schedule field

0182-Admin GIS Attribute Mapping

Version

6.1

Description

With the “Master Inventory in GIS” option checked for the asset type, enables the GIS Attribute Mapping tab in the Asset Type administration portlet, so administrators can link asset type attribute fields to GIS attribute.

Interdependency

Parent | 0160-Admin AMS Asset Definition

Solution

Accele Asset Management

Access

Setup portlet > Assets > Type > GIS Attribute Mapping tab

0183-Reference Hearing Calendar

Version

6.1

Description

Enables the Hearing Calendar administration function for administrators to create hearing calendar items in Civic Platform Classic.

Interdependency

Interdependency | 0050-Reference Hearing Calendar (Old)

If you enable FID 0183, Civic Platform ignores the setting of FID 0050. When you disable FID 0183 but enable FID 0050, the calendar item edit page provides the fields differently than when you enable FID 0183.

Solution

All

Access

Classic Admin Tools > Calendar > Hearing Calendar

0184-Admin Content Customization

Version

6.0.1

Description

- Enables the Content Customize portlet for administrators to perform the following tasks:
 - View the existing Content Customize configuration
 - Customize message content
- Enables the Notification Template portlet for administrators to perform the following tasks:
 - View the existing email templates

- Customize email templates

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > Content Customize

Setup portlet > Communication Manager > Notification Template

0185-Admin V360 Export

Version

6.1

Description

Enables the Export portlet for administrators to export system settings such as rule settings and QuickQuery settings into an XML file for importing to other agencies.

Interdependency

None

Solution

All

Access

Setup portlet > System Tools > Export

0186-Admin V360 Import

Version

6.1

Description

Enables the Import portlet for administrators to import the .XML system settings file from other agencies.

Interdependency

None

Solution

All

Access

Setup portlet > System Tools > Import

0187-Admin Upload Logo Image

Version

6.1

Description

Enables the Logo portlet for administrators to perform the following tasks:

- View and download logos for agencies
- Upload or delete logo files for agencies

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > Logo

0188-Admin Flow Diagram

Version

6.1.1

Description

Enables the Flow Diagram administration function for administrators to set up and manage flow diagrams, each flow diagram providing list of nodes that help users perform their daily tasks.

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > My Navigation

0190-Manage Trust Account

Version

6.1.2

Description

- Enables the Trust Account portlet for users to perform the following tasks:
 - Search and view trust accounts
 - Maintain trust accounts
 - Perform trust account transactions
 - View and print trust accounts reports
- Enables the Trust Account tab, in the Record port, for users to perform the following tasks:
 - Manage all trust accounts associated with the current record or its associated address, parcel, contact, licensed professional, and parent record.
 - Set one trust account as the primary trust account.

Interdependency

| | |
|-------|--------------------------------------|
| Child | 0279-Associate Address |
| Child | 0280-Associate Parcel |
| Child | 0278-Associate People |
| Child | 8107-Cashier-Supervisor |
| Child | 0331-Trust Account Associated Record |

Solution

All

Access

Trust Account portlet

Record portlet > Trust Account tab

0191-Update license expiration task

Version

6.1.1

Description

Enables the synchronization of the license information from a reference license professional to its associated records in Civic Platform Classic.

Interdependency

None

Solution

All

Access

Classic Admin Tools > People > Licensed Professional

0192-Workflow Report Setting

Version

6.1.2

Description

Enables the Report Setting administration function of workflow for administrators to manage report associations with workflow tasks, so when users change a workflow task, a report automatically prints.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Workflow > Report Setting

0193-Report Management Auto Report

Version

6.1.2

Description

Enables the Auto Report administration function in Civic Platform Classic for administrators to define reports that automatically print with workflow task updates.

Interdependency

| | |
|--------|------------------------------|
| Parent | 0145-Admin Report Management |
|--------|------------------------------|

Solution

All

Access

Classic Admin Tools > Report Management > Auto Report

0194-Access Structure Conditions

Version

6.1.2

Description

Enables the Condition links besides structures in the Structure - List page, so administrators can configure conditions for reference structures in Civic Platform Classic.

Interdependency

| | |
|--------|--|
| Parent | 0082-Reference Structure |
| Child | 0212-Reference Structure Condition History |

Solution

All

Access

Classic Admin Tools > Property > Structure > Condition link in the Structure - List page

0195-Admin-PM Schedule

Version

6.1

Description

Enables the PM Schedule portlet for users to perform the following tasks:

- View the PM schedules list
- Create, search, edit and delete PM schedules

Interdependency

| | |
|-------|--|
| Child | 0201-Admin-Generating Work Orders By PM Schedule |
| Child | 0196-Admin-PM Schedule Linked Quick Query |
| Child | 0199-Admin-PM Schedule Hold Event |

Solution

Accela Asset Management

Access

PM Schedule portlet

0196-Admin-PM Schedule Linked Quick Query

Version

6.1

Description

Enables the Linked Quick Query tab in the PM Schedules portlet for users to perform the following tasks:

- Select a linked quick query and save it to the PM schedule. The quick query options link with the AMS Asset Data List portlet in the Global QuickQueries administration portlet.
- Execute linked quick query, and link the queried assets to the PM schedule.

Interdependency

| | |
|--------|--------------------------|
| Parent | 0195-Admin - PM Schedule |
|--------|--------------------------|

Solution

Accela Asset Management

Access

PM Schedule > Linked Quick Query tab

0197-Admin-PM Schedule Linked Asset

Version

6.1

Description

Enables the Linked Asset tab in the PM Schedules portlet for users to perform the following tasks:

- View the linked asset list
- Edit or delete linked asset
- View selected asset in GIS

Interdependency

| | |
|----------------|----------------------------|
| Parent | 0195-Admin - PM Schedule |
| Interoperation | 8189-Asset Data Management |
| Interoperation | 8119-GIS Service |

Solution

Accela Asset Management

Access

PM Schedule > Linked Asset tab

0198-Admin-PM Schedule Skipped Asset

Version

6.1

Description

Enables the Skipped Asset tab in the PM Schedules portlet for users to perform the following tasks:

- View the skipped asset list
- Edit or delete skipped asset
- View selected asset in GIS

Interdependency

| | |
|----------------|----------------------------|
| Parent | 0195-Admin - PM Schedule |
| Interoperation | 8189-Asset Data Management |
| Interoperation | 8119-GIS Service |

Solution

Accela Asset Management

Access

PM Schedule > Skipped Asset tab

0199-Admin-PM Schedule Hold Event

Version

6.1

Description

Enables the Hold Event tab in the PM Schedules portlet for users to perform the following tasks:

- View the hold event list
- Create, edit, and delete hold events

Interdependency

| | |
|--------|--------------------------|
| Parent | 0195-Admin - PM Schedule |
|--------|--------------------------|

Solution

Accela Asset Management

Access

PM Schedule > Hold Event tab

0200-Admin-PM Schedule Maintenance Record

Obsolete.

0201-Admin-Generating Work Orders By PM Schedule

Version

6.1

Description

Enables the Generate button in the PM Schedule portlet for users to generate work orders by PM schedules.

Interdependency

Parent | 0195-Admin - PM Schedule

Solution

Accela Asset Management

Access

PM Schedules portlet > Generate button

0202-Application Type Image

Version

6.1

Description

Enables the Application Type Icon field in the Application Type administration function, so administrators can assign an image to an application type.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Application > Application Type > (After selecting an application type) Application Type Icon field

0204-Properties Rename Parcel ID

Version

6.1.2

Description

Enables the Rename link in the Parcel administration function, so administrators can rename a parcel, that is, creating a new parcel record that is an exact copy of the old parcel record. Re-links addresses, owners,

conditions, attachments, genealogy records, and permits, from the old parcel record, to the new parcel record. The new parcel record has a status of Active (Enabled). The old parcel record remains in Civic Platform, but with a disabled status.

Interdependency

None

Solution

All

Access

Class Admin Tools > Property > Parcels > Rename link in the parcels list

0205-Admin App Spec Info Table

Version

6.2

Description

Enables the Application Spec Info Table function for administrators to configure ASI tables.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Application > Application Spec Info Table

0206-Admin Fee Decisions

Version

6.2

Description

Enables the Fee Calc and Fee Calc Criteria administration functions for administrators to create complex fee calculations. The if-then calculations follow a true-false logic to determine values for complex calculations.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Fees > Fee Calc

Classic Admin Tools > Fees > Fee Calc Criteria

0207-Admin Inspector Districts

Version

6.2

Description

- Enables the User Information link in the User administration function, so administrators can configure the inspector profile information about users.
- Enables the District link in the Parcel administration function, so administrators can specify the inspection district that parcels belongs to.
- Enables the District link in the Address administration function, so administrators can specify the inspection district that addresses belongs to.

Interdependency

None

Solution

All

Access

Classic Admin Tools > User Profile > User > User Information link for each user

Classic Admin Tools > Property > Parcel > District link for each parcel

Classic Admin Tools > Property > Address > District link for each address

0208-Reference Address Condition History

Version

6.2

Description

Displays the Condition History tab when users click a condition in the Condition tab of the Addresses portlet.

Interdependency

| | |
|--------|------------------------------------|
| Parent | 0069-Reference Condition Addresses |
|--------|------------------------------------|

Solution

All

Access

Addresses portlet > Conditions tab > (After selecting a condition) Condition History tab

0209-Reference Parcel Condition History

Version

6.2

Description

Displays the Condition History tab when users click a condition in the Condition tab of the Parcels portlet.

Interdependency

| | |
|--------|----------------------------------|
| Parent | 0057-Reference Condition Parcels |
|--------|----------------------------------|

Solution

All

Access

Parcels portlet > Conditions tab > (After selecting a condition) Condition History tab

0210-Reference Owner Condition History

Version

6.2

Description

Displays the Condition History tab when users click a condition in the Condition tab of the Owners portlet.

Interdependency

Parent | 0110-Reference Owner Condition

Solution

All

Access

Owners portlet > Conditions tab > (After selecting a condition) Condition History tab

0211-Reference Licensed Professional Cond. History

Version

6.2

Description

Displays the Condition History tab when users click a condition in the Condition tab of the Licensed Professionals portlet.

Interdependency

Parent | 0070-Reference Condition Licensed Professionals

Solution

All

Access

Licensed Professionals portlet > Conditions tab > (After selecting a condition) Condition History tab

0212-Reference Structure Condition History

Version

6.2

Description

Enables the Deleted Condition(s) section when users view the condition of a structure in Civic Platform Classic.

Interdependency

Parent | 0194-Access Structure Conditions

Solution

All

Access

Classic Admin Tools > Property > Structure > Condition link in the Structure - List page > Deleted Condition(s) section in Structure Condition Summary

0213-Admin AMS Parts Item Location

Version

6.2

Description

Enables the Part Location administration portlet for users to perform the following tasks:

- View the existing part location definitions
- Create, search, edit and delete part locations

Interdependency

None

Solution

Accela Asset Management

Access

Setup portlet > Part > Part Location

0214-Admin AMS Parts Vendors and Manufacturers

Version

6.2

Description

Enables the Part Contact portlet for administrators to perform the following tasks:

- View the existing part contacts including manufacturers and vendors
- Create, search, edit and delete part contacts

Interdependency

None

Solution

Accela Asset Management

Access

Setup portlet > Part > Part Contact

0218-Admin Auto-Assign Inspection

Version

6.2

Description

Enables the Inspection Discipline administrator function in the inspection type configuration, so administrators can assign disciplines to an inspection type.

Interdependency

Parent | 0133-Admin Inspection Type Sets

Solution

All

Access

Classic Admin Tools > Inspection > Inspection > Inspection -Edit Page > Configuration button > Inspection Discipline button

0219-Admin AMS PM Schedule Location

Version

6.2

Description

Enables the Linked Address tab in the PM Schedules portlet for users to perform the following tasks:

- View the addresses linked to PM schedules
- Look up addresses and link one or more to a PM schedule
- Delete the linking between addresses and PM schedules

Interdependency

Interoperation | 0220-Admin AMS Address PM Schedule

Solution

Accela Asset Management

Access

PM Schedules > Linked Address tab

0220-Admin AMS Address PM Schedule

Version

6.2

Description

Enables the PM Schedules tab in the Addresses portlet so users can view all the PM Schedules associated to the current address.

Interdependency

Interoperation | 0219-Admin AMS PM Schedule Location

Solution

Accela Asset Management

Access

Addresses > PM Schedules tab

0221-Admin Console Management

Version

6.2

Description

Enables the Console Configuration portlet for administrators to create and organize the various console configurations.

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > Console Configuration

0222-Address Asset

Version

6.2

Description

Enables the Assets tab in the Addresses portlet for users to view all the assets associated to the current address.

Interdependency

None

Solution

Accela Asset Management

Access

Addresses portlet> Assets tab

0223-Address Work Order

Version

6.2

Description

Enables the Work Order tab in the Addresses portlet for users to view all the work orders associated to the current address.

Interdependency

None

Solution

Accela Asset Management

Access

Addresses > Work Order tab

0224-Active Directory

Version

6.2.1

Description

- Enables the External User Policy administration function for administrators to add an active directory server to Civic Platform security policies.
- Enables External User Search in the User Add page for administrators to search and add external users in the active directory server to Civic Platform database.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Agency Profile > Security Policies > External User Policy

Classic Admin Tools > User Profile > User > External User option in the User Add page

0226-Reports Manager Admin

Version

6.3.0

Description

Enables the Report Manager portlet for administrators to manage report services, report variables, and reports.

Interdependency

Child | 0240-Reports Manager Admin

Solution

All

Access

Setup portlet > Report > Report Manager

0227-Condition Assessment

Version

6.3.0

Description

Enables the Condition Assessment portlet for administrators to perform the following tasks:

- View the existing condition assessment type definitions
- Create, search, edit and delete condition assessment types

Interdependency

Interoperation | 0274-Rating Type

Solution

Accela Asset Management

Access

Setup portlet > Assets > Condition Assessment

0229-Admin display Department

Version

6.3.0

Description

Displays the Department field in the Inspection-Edit page, so administrators can select the department responsible for an inspection type.

Interdependency

Parent | 0133-Admin Inspection Type Sets

Solution

All

Access

Classic Admin Tools > Inspection > Inspection > (In the Inspection-Edit page) Department field

0230-Menu Navigation Admin

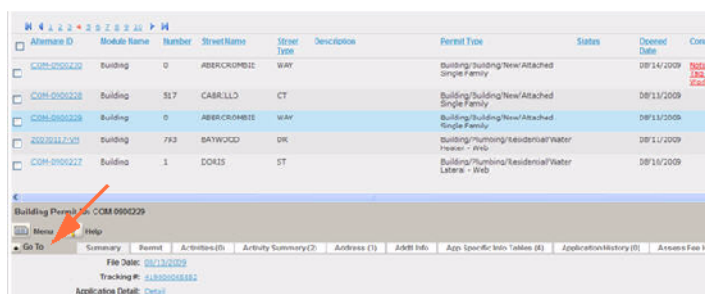
Version

6.3.0

Description

Enables the Menu Navigation portlet for administrators to perform the following tasks:

- Configure the custom navigation menu that displays in the Go To menu tab.
- Configure the record detail tabs.



| Alternate ID | Module Name | Number | StreetName | Street Type | Description | Permit Type | Status | Issued Date | CodeBk |
|--------------|-------------|--------|-------------|-------------|--|-------------|--------|-------------|---------------|
| COH-090220 | Building | 0 | ABERCROMBIE | WAY | Building/Building/New/Attached Single Family | | | 08/14/2009 | NOTICE ISSUED |
| COH-090228 | Building | 517 | CARR-LLD | CT | Building/Building/New/Attached Single Family | | | 08/13/2009 | |
| COH-090229 | Building | 0 | ABERCROMBIE | WAY | Building/Building/New/Attached Single Family | | | 08/13/2009 | |
| ZOO3041700 | Building | 793 | BAYWOOD | DR | Building/Building/Residential/Water Heater - RW | | | 08/11/2009 | |
| COH-090227 | Building | 1 | DORIS | ST | Building/Building/Residential/Water Lateral - RW | | | 08/10/2009 | |

Building Permit ID: COH-090229

Menu Help

Go To Summary Permit Activities(0) Activity Summary(2) Address (1) Addt Info App. Specific Info TabMes (4) ApplicationHistory (0) Assess Fee Hist

File Date: 08/13/2009
Tracking#: 01800048882
Application Detail: Detail

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > Menu Navigation

0231-Admin Inspection Type/Guide Sheet for ODS

Information about this item is unavailable at this time.

0232-Admin display Option/Required column

Version

6.3.0

Description

Displays the Required/Optional column in the Inspection-Edit page, so administrators can set whether to require an inspection type for an inspection group.

Interdependency

Parent

0133-Admin Inspection Type Sets

Solution

All

Access

Classic Admin Tools > Inspection > Inspection > (In the Inspection-Edit page) Required/Optional column

0234-Workflow Calendar

Version

6.3.2

Description

Enables the Workflow Blockout as a calendar type in the calendar management in Civic Platform Classic, so users can configure workflow blockout calendars.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Calendar > Calendar > Workflow Blockout option in Type field

0235-Inspection Default Value Policy

Version

6.3.2

Description

Enables the Inspection Default Value Policy function for administrators to establish rules (default settings) for certain inspections created by specify agency or group.

- Default Status for New Inspection
- Number of Calendar Days Available to Schedule Inspections
- Allow Same Day Inspection Scheduling
- Inspection Cutoff Time

Interdependency

None

Solution

All

Access

Classic Admin Tools > Agency Profile > Security Policy > Inspection Default Value Policy link

0236-Inspection Type and Status Security

Version

6.3.2

Description

Enables the Inspection Type and Status Security function for administrators to perform the following tasks:

- Specify the default status when a specific agency or specific group creates an inspection
- Define the edit and read access right, of a specific agency or a specific group, to an inspection after its creation
- Specify whether a specific agency or specific group has the permission to create an inspection of specific inspection group/inspection type

Interdependency

None

Solution

All

Access

Classic Admin Tools > Agency Profile > Security Policy > Inspection Type and Status Security link

0237-Attach GIS Object

Obsolete.

0239-Activities For People and Property

Version

6.3.2

Description

Enables the Activity tab in the following portlets for users to manage the activities for people and property:

- Addresses portlet
- Parcels portlet
- Owners portlet
- Contacts portlet
- Licensed Professional portlet

Interdependency

| | |
|--------------|---------------------------------------|
| Parent of #1 | 0006-Reference Property Addresses |
| Parent of #2 | 0005-Reference Property Parcels |
| Parent of #3 | 0089-Reference Property Owners |
| Parent of #4 | 0084-Reference People Contact |
| Parent of #5 | 0008-Reference Licensed Professionals |

Solution

All

Access

Addresses portlet > Activity tab

Parcels portlet > Activity tab

Owners portlet > Activity tab

Professionals portlet > Activity tab

Contacts portlet > Activity tab

0240-Reports Manager Admin

Version

6.3.2

Description

Enables the Variables settings in the Report Manager portlet for administrators to create and manage report variables.

Interdependency

Parent

0226-Reports Manager Admin

Solution

All

Access

Setup portlet > Report > Report Manager > Settings > Variables node

Setup portlet > Report > Report Manager > Menu button > New Variable button

0241-Parcel Subdivision and Lot Search

Version

6.4.0

Description

- Enables the Subdivision field for the Parcels search portlet, so that administrators can search parcels with subdivision information and can enter subdivision information about parcels.
- Enables the Lot field for the Parcels search in Civic Platform Classic. If you disable FID 0241, the Lot field can display in the other places except the Parcels Search page in Civic Platform Classic.

Interdependency

None

Solution

All

Access

Parcels portlet > Subdivision field in the Parcels Search, Parcels Details pages

Class Admin Tools > Property > Parcels > Subdivision and Lot fields in Parcels Search, Parcels Details pages

0242-Required for Fee Calculation

Version

6.4.0

Description

Enables the Req for Fee Calc field in the configuration of an ASI group or an ASI table group. Administrations can select Yes in the Req for Fee Calc field for an ASI group or a column in an ASI table, so the field displays along with a visual indicator (\$) on the application intake form, as required for fee calculation.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Application > Application Spec Info > Application Specific Info - Edit

Classic Admin Tools > Application > Application Spec Info Table > Application Specific Info Table - Edit

0243-GIS Service

Version

6.4.0

Description

Disables the Portlet URL field in the GIS Service administration function for administrators to configure the portlet URL address that the GIS service works for.

Interdependency

None

Solution

All

Access

Classic Admin Tools > GIS > GIS Service > (In the GIS Service - Edit page) Portlet URL field

0244-Fee Estimation

Version

6.4.0

Description

Displays the Enable Fee Estimation option, as one of the Enable For ACA check boxes, in an application type configuration. Administrators can check the Enable Fee Estimation option to enable users to create a partial application that includes a calculation of estimated fees. Civic Platform bases the fee estimation on the fee schedule associated with the application type.

Interdependency

| | |
|--------|------------------------------|
| Parent | 0065-Admin Application Types |
| Parent | 0075-Admin License Types |

You must disable FID 0075 to hide Velocity Hall information from the application type configuration page.

Solution

All

Access

Classic Admin Tools > Application > Application Type > Application Category - Edit > Enable Fee Estimation field.

0245-Long Term Time Tracking

Version

6.4.0

Description

- Enables the Time Tracker Clock Action field in the Task Status administration function, for administrators to link a task status with a time tracker clock action.

- Enables the Duration (Days) field in the Application Type administration function, for administrators to configure the number of days a task should take.
- Enables the Duration (Days) field in the Workflow Process administration function, for administrators to configure the number of days a task should take.
- Enables the 0245 - Long-Term Time Tracking field in the Record Type Security administration function, for administrators to assign or not assign the feature in a record type security configuration.
- Displays the In Possession Time (hrs) in the Task Details tab of the Record portlet, so users can view the in possession time of a task.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Work Flow > Task Status > (After selecting a task status) Time Tracker Clock Action field

Classic Admin Tools > Application > Application Type > (After selecting an application type) Duration (Days) field

Classic Admin Tools > Workflow > Process > (After selecting a process) Duration (Days) field

Setup portlet > Application > Record Type Security > (When assigning a record type security) 0245 - Long-Term Time Tracking field

Record portlet > Workflow tab > (After selecting a task) In Possession Time (hrs) field in the Task Details tab

0246-Activities Specific Information

Version

6.4.0

Description

- Enables the Activity Specific Info portlet for administrators to create and manage activity specific info groups.
- Enables the Activity Type portlet for administrators to create activity types and manage activity types, and link activity types to activity specific info groups.

Interdependency

None

Solution

All

Access

Setup portlet > Workflow & Activity > Activity Specific Info

Setup portlet > Workflow & Activity > Activity Type

0247-Agency Workday Calendar

Version

6.4.0

Description

Enables the Agency Workday as a calendar type in the calendar management in Civic Platform Classic, so users can configure agency work days.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Calendar > Calendar > Agency Workday option in Type field

0248-Admin-Security Policy-EDMS Access Security

Version

6.4.0

Description

Enable the EDMS Access Security for administrators to perform the following tasks:

- Specify which EDMS sources are valid for each of the Civic Platform modules
- Determine which users can upload and download text documents and download images from a certain EDMS source

FID 0248 enables administrators to set up authentication by site or by user to upload and download documents.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Agency Profile > Security Policy > EDMS Access Security link > Authentication option

0249-Workflow Edit

Version

6.4.1

Description

Displays the Module field in the Workflow - Edit and Workflow - Add pages, so administrators can specify whether the current workflow hierarchy applies to a specific module, or all the modules.

Interdependency

Parent

| 0112-Admin Workflow

Solution

All

Access

Classic Admin Tools > Workflow > Workflow > Workflow-Edit or Workflow - Add page

0250-People Info Table

Version

6.4.1

Description

Enables the People Info Table administration function for administrators to configure template tables as additional field tables for licensed professionals and contacts.

Interdependency

None

Solution

All

Access

Classic Admin Tools > People > People Info Table

0251-Hearing Reason

Version

6.4.2

Description

Enables the Hearing Reason administration function for administrators to add and manage hearing reasons.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Calendar > Hearing Reason

0252-Asset Type Available CAP Type

Version

6.4.1

Description

Enables the Work Order Types tab in the Asset Type portlet for administrators to perform the following tasks:

- View the associated work order types list
- Assign work order types to the asset type, or delete the association

Interdependency

Parent | 0160-Admin AMS Asset Definition

Solution

AMS

Access

Setup portlet > Assets > Type > Work Order Types tab

0253-Asset GIS Synchronize

Version

6.4.1

Description

With the “Master Inventory in GIS” option checked for the asset type, enables the Sync with GIS button for synchronization of asset type records with GIS. Administrators can perform the following tasks:

- Synchronize asset type records with GIS
- View the GIS sync log

Interdependency

Parent | 0160-Admin AMS Asset Definition

Solution

Accela Asset Management

Access

Setup portlet > Assets > Type > Sync with GIS button

0254-WO Task Definition

Version

6.5.0

Description

Enables the Work Order Task administration portlet, and the Work Order Task tab in the Work Order Template administration portlet, so administrators can perform the following tasks:

- View the work order task configurations
- Create, search and delete work order tasks
- Look up work order tasks and associate work order tasks with a work order template

Interdependency

Interoperation | 0169-Admin - Work Order Template

Child

| 0306-Work Order Type

Solution**Accela Asset Management****Access**

Setup portlet > Work Orders > Work Order Task

Setup portlet > Work Orders > Work Order Template > Work Order Task tab

0255-Manage Asset Type Security

Version

6.5.0

Description

Enables the Asset Type Security portlet for administrators to establish security levels for asset types.

Interdependency

None

Solution

All

Access

Setup portlet > Assets > Security

0256-Carrying over Failed Guide Sheet Items

Version

6.5

Description

Enables the Carry Over Failed Items configuration option in the Reference Guide Sheet function for administrators to mark the option for carrying over failed items from a previous guidesheet to a new one for the next inspection.

Interdependency

None

Solution

Building

Access

Classic Admin Tools > Inspection > Guide Sheet > Carry Over Failed Items configuration option in the Reference Guide Sheet edit page

0257-Admin Inspection Calendar

Version

6.5

Description

Enables the Inspection calendar option in the Calendar administration portlet, so administrators can perform the following tasks:

- View all the calendars of Inspection type
- Create new calendars of Inspection type

Interdependency

None

Solution

All

Access

Setup portlet > Calendar > Inspection type in the Type field

0258-Supervisor Inspection Calendaring

Version

6.5

Description

Enables the Supervisor Maintenance function in the Calendar administration portlet for supervisors to manages and assigns inspectors to calendars.

Interdependency

Child

0258-Supervisor Inspection Calendaring

Solution

All

Access

Setup portlet > Calendar > Supervisor Maintenance tree node

0259-ASI Lookup Table

Version

6.5

Description

Enables the ASI Lookup Table portlet for administrators to configure and manage ASI lookup tables.

Interdependency

None

Solution

All

Access

Setup portlet > Application > ASI Lookup Tables

0260-Expression Builder

Version

6.5

Description

Enables the Expression Builder portlet for administrators to configure and manage expressions for target portlets.

Interdependency

None

Solution

All

Access

Setup portlet > Application > Expression Builder

0261-ASI Form Layout Editor

Version

6.5

Description

Enables the ASI Form Layout Editor portlet for administrators to perform the following tasks:

- Create ASI screens that display in the ASI section of an application based on the application type
- Add, customize and manipulate the size of each ASI fields in the ASI screens
- Use the buttons in the administration portlet to preview, align, add dynamic text, draw lines and insert tables
- Set permissions for modules, groups, and users

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > ASI Form Layout Editor

0263- Admin Event Calendar (obsolete, replaced by 8483)

Version

6.5

Description

- Enables the Event calendar type in the Calendar administration portlet, so administrators can perform the following tasks:

- View all the calendars of Event type
- Create new calendars of Event type
- Enables the Event Type Maintenance function in the Calendar portlet for administrators to configure event types with event calendar type.

Interdependency

None

Solution

All

Access

Setup portlet > Calendar > Event type in the Type field

Setup portlet > Calendar > Event Type Maintenance tree node > Event option in Calendar Type field

0264-Admin Time Accounting Type

Version

6.6.0

Description

- Enables the Time Accounting Type Maintenance portlet for administrators to add and manage time accounting types.
- Enables the Time Accounting Types tab in the Time Accounting Group portlet for administrators to associate time accounting types with time accounting groups.

Interdependency

Parent of #2

| 0266-Admin Time Accounting Group

Solution

All

Access

Setup portlet > Time Accounting > Type Maintenance

0265-Admin Time Accounting User Profile

Version

6.6.0

Description

Enables the User Profile portlet for administrators to add and manage time accounting user profiles.

Interdependency

None

Solution

All

Access

Setup portlet > Time Accounting > User Profile

0266-Admin Time Accounting Group

Version

6.6.0

Description

Enables the Time Accounting Group portlet for administrators to add and manage time accounting groups.

Interdependency

Child | 0264-Admin Time Accounting Type

Solution

All

Access

Setup portlet > Time Accounting > Group

0267-TSI Form Layout Editor

Version

6.6.0

Description

Enables the TSI Form Layout Editor portlet for administrators to perform the following tasks:

- Create TSI screens that display in the task-specific information section of a workflow task based on the task
- Add, customize and manipulate the size of each TSI fields in the TSI screens
- Use the buttons in the administration portlet to preview, align, add dynamic text, draw lines and insert tables
- Set permissions for modules, groups, and users

Interdependency

None

Solution

All

Access

Setup portlet > Workflow & Activity > TSI Form Layout Editor

0268-APO Form Layout Editor

Version

6.6.0

Description

Enables the APO Form Layout Editor portlet for administrators to perform the following tasks:

- Create APO Type screens that display at the bottom of the APO Type section when users create a new application
- Add, customize and manipulate the size of each APO fields in the APO Type screen
- Use the buttons in the administration portlet to preview, align, add dynamic text, draw lines and insert tables
- Set permissions for modules, groups, and users

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > APO Form Layout Editor

0269-Admin Attribute Form Layout Editor

Version

6.6.0

Description

Enables the asset Form Layout Editor portlet for administrators to perform the following tasks:

- Create asset screens that display in the Asset Detail form of an asset based on the asset type
- Add, customize and manipulate the size of each asset fields in the asset screens
- Use the buttons in the administration portlet to preview, align, add dynamic text, draw lines and insert tables
- Set permissions for modules, groups, and users

Interdependency

None

Solution

All

Access

Setup portlet > Assets > Form Layout Editor

0270-Sequence Generator

Version

6.6.0

Description

Enables the Sequence Generator portlet for administrators to define and manage the numbering sequence and masks in different types of items, such as permits, invoices, and receipts.

Interdependency

Interoperation | 8097-Manual Application Number Option

Solution

All

Access

Setup portlet > System Tools > Sequence Generator

0272-Control Shared Drop Down List in Admin

Version

6.6.0

Description

Enables the Shared Drop-Down List portlet for administrators to create shared drop-down lists, and apply them to the groups and templates, including activity-specific information groups, APO templates, ASI groups, asset attributes, people templates and info tables, and task specific information groups.

Interdependency

None

Solution

All

Access

Setup portlet > Application > Shared Drop-Down List

0273-ASI Table Drill Down

Version

6.6.1

Description

Enables the ASI Drill-down portlet for administrators to configure ASI and ASI table drill-downs and then add them in the application or the App Spec Info tab in Civic Platform and Citizen Access.

Interdependency

None

Solution

All

Access

Setup portlet > Drill-Down > ASI Drill-down

0274-Rating Type

Version

6.6.0

Description

Enables the Rating Type administration portlet, the Calculated Rating Types tab in the Condition Assessment administration portlet, and the Rating Types tab in the Asset Type administration portlet, so users can perform the following tasks:

- View the existing rating types configuration
- Create, search, edit and delete rating types
- View the rating types associated with condition assessment types
- View the rating types associated with asset types

Interdependency

| | |
|----------------|---------------------------------|
| Interoperation | 0160-Admin AMS Asset Definition |
| Interoperation | 0227-Condition Assessment |

Solution

All

Access

Setup portlet > Assets > Rating Type

Setup portlet > Assets > Condition Assessment > Calculated Rating Types tab

Setup portlet > Assets > Type > Rating Types tab

0275-Condition by Group

Version

6.6.0

Description

- Enables the Condition by Group tree node in the Conditions administration portlet, so administrators can manage conditions by groups.
- Enables the New Group item in the Conditions administration portlet, so administrators can create new condition groups.

Interdependency

None

Solution

All

Access

Setup portlet > Conditions > Conditions > (In the Conditions tree) Condition by Group node

Setup portlet > Conditions > Conditions > (Right clicking in the Conditions tree) New Group item

0276-Address Type Group

Version

6.6.0

Description

Enables the Address Type Group portlet for administrators to define and manage address type groups.

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > Address Type Group

0277-Address Type for the reference address

Version

6.6.0

Description

Enables the Address Type tab for the Addresses portlet, so users to specify the address type for an address.

Interdependency

| | |
|--------|-----------------------------------|
| Parent | 0006-Reference Property Addresses |
|--------|-----------------------------------|

Solution

All

Access

Addresses portlet > Address Type tab

0278-Associate People

Version

6.6.0

Description

Enables the Associated People tab in the Trust Account portlet for users to manage the relationship between trust accounts and licensed professionals or contacts.

Interdependency

| | |
|--------|---------------------------------------|
| Parent | 0190-Manage Trust Account |
| Child | 0084-Reference People Contact |
| Child | 0008-Reference Licensed Professionals |

Solution

All

Access

Trust Account portlet > Associated People

0279-Associate Address

Version

6.6.0

Description

Enables the Associated Address tab in the Trust Account portlet for users to manage the relationship between trust accounts and addresses.

Interdependency

Parent | 0190-Manage Trust Account

Solution

All

Access

Trust Account portlet > Associated Address

0280-Associate Parcel

Version

6.6.0

Description

- Enables the Associated Parcel tab in the Trust Account portlet for users to manage the relationship between trust accounts and parcels.
- Enables the Associated Trust Account tab in the reference parcel portlet, so users can copy or move associated trust accounts between genealogically related reference parcels.

Interdependency

Parent | 0190-Manage Trust Account

Solution

All

Access

Trust Account portlet > Associated Parcel

Parcel portlet > Associated Trust Account tab

0281-Supervisor Master Calendaring

Version

6.6.0

Description

Enables the Master Calendar tab in the Supervisor Maintenance function of the Calendar administration portlet for supervisors to assign multiple calendars to some inspectors and create a master calendar.

Interdependency

Parent | 0281-Supervisor Master Calendaring

Solution

All

Access

Setup portlet > Calendar > Supervisor Maintenance tree node > Master Calendar tab

0282-Expression Migration

Obsolete.

0283-Associated CAP List

Version

6.6.1

Description

Enables the Associated Record List tab in the Licensed Professionals portlet for users to manage associated record list for licensed professionals.

Interdependency

Parent | 0008-Reference Licensed Professionals

Solution

All

Access

Licensed Professionals portlet > Associated Record List tab

0284-Batch Job Maintenance

Version

6.7.0

Description

Any of the following FIDs can enable the Batch Engine administration portlet:

- 0106-Admin Batch job (the list portlet, the Job Detail tab, Job Schedule tab, and Log tab)
- 0284-Batch Job Maintenance (the list portlet and the Job Detail tab) and 0285-Batch Job Schedule (the Job Schedule tab and the Log tab)
- 8122-Batch Job (the list portlet, the Job Detail tab, Job Schedule tab, and Log tab)
- 8049-Batch Job (old) (the list portlet, the Job Detail tab, Job Schedule tab, and Log tab)

Interdependency

| | |
|----------------|-------------------------|
| Child | 0285-Batch Job Schedule |
| Interoperation | 0106-Admin Batch job |

| | |
|----------------|----------------------|
| Interoperation | 8122-Batch Job |
| Interoperation | 8049-Batch Job (old) |

Solution

All

Access

Setup portlet > System Tools > Batch Engine

Batch Jobs portlet

0285-Batch Job Schedule

Version

6.7.0

Description

If you disable FIDs 0106, 8122, and 8149, and enable FID 0284, this FID:

- Enables the Job Schedule and Log tabs in the Batch Engine administration portlet for users to configure a batch job schedule and to view the batch job logs.
- Enables the Execute button in the Batch Engine administration portlet for users to execute a batch job.
- Enables the Stop button in the Job Detail tab of the Batch Engine administration portlet for users to stop a batch job.

Interdependency

| | |
|--------|----------------------------|
| Parent | 0284-Batch Job Maintenance |
|--------|----------------------------|

Solution

All

Access

Setup portlet > System Tools > Batch Engine > Job Schedule tab

Setup portlet > System Tools > Batch Engine > Log tab

0286-Delegate User Management

Version

6.7.0

Description

Controls access to functions in the Delegate User portlets.

- Full access: Users can create, update, view, delete, and search delegate user relationships in the Delegate User portlet. User can also search and view Delegate User relationship history in the Delegate User History portlet.
- Read only: Users can view and search Delegate User relationships in the Delegate User portlet and Delegate User History. User cannot create, update, or delete Delegate User relationships.
- No access: The Delegate User Portlet does not display to the user.

Table 122: FID 0286 Delegate User Management

| FID Access Setting | Super Agency Administrator | Delegate User from Super Agency | Sub-Agency Administrator |
|--|--|---|--|
| Full Access set at both the Parent and Sub-agencies | User has full-access. User can create, update, view, delete, and search delegate user relationships in the Delegate User portlet. User can also search and view Delegate User relationship history in the Delegate User History portlet. | User has full-access at both agencies. User can create, update, view, delete, and search delegate user relationships in the Delegate User portlet. User can also search and view Delegate User relationship history in the Delegate User History portlet. | User has full-access. User can create, update, view, delete, and search delegate user relationships in the Delegate User portlet. User can also search and view Delegate User relationship history in the Delegate User History portlet. |
| Full Access set at Super Agency and Read Only set at Sub-agency. | User has full-access. User can create, update, view, delete, and search delegate user relationships in the Delegate User portlet. User can also search and view Delegate User relationship history in the Delegate User History portlet. | User has full access permissions at the Super Agency and Read-only permissions at the Sub-agency. | Read Only Permissions: User can view and search Delegate User relationships in the Delegate User portlet and Delegate User History. User cannot create, update, or delete Delegate User relationships. |
| Full Access set at Super Agency and No Access set at the Sub-agency. | User has full-access. User can create, update, view, delete, and search delegate user relationships in the Delegate User portlet. User can also search and view Delegate User relationship history in the Delegate User History portlet. | Full Access at super agency. No access at Sub-agency. | No Access. |
| Read Only set at Super Agency. Full Access to Sub-agency. | Read Only Permissions: User can view and search Delegate User relationships in the Delegate User portlet and Delegate User History. User cannot create, update, or delete Delegate User relationships. | Read Only permissions at Super Agency. Full Access Sub-agency | User has full-access. User can create, update, view, delete, and search delegate user relationships in the Delegate User portlet. User can also search and view Delegate User relationship history in the Delegate User History portlet. |
| No Access at Super Agency. Read Only Access at Sub-agency. | No Access. | No Access at Super Agency. Read Only Access at Sub-agency. | Read Only Permissions: User can view and search Delegate User relationships in the Delegate User portlet and Delegate User History. User cannot create, update, or delete Delegate User relationships. |

Interdependency

None

Solution

All

Access

Setup portlet > System Tools > Delegate User

0288-Enable Inspection Flow

Version

6.7.0

Description

Enables the Inspection Flow option in the inspection group configuration, so administrators can select the option, and configure inspection flow for an inspection group.

Interdependency

| | |
|----------------|----------------------------------|
| Parent | 0133-Admin Inspection Type Sets |
| Interoperation | 0289-Enable Inspection Milestone |

FIDs 0288 and 0299 control the two methods for determining the order of the inspection types in the inspection group according to the following settings:

- FID 0288 full access and FID 0289 full access. The Inspection Flow, Inspection Milestone, and None options in Civic Platform. This gives the agency administrator the option to assign a manual inspection flow, an inspection milestone, or no required flow to the inspection group.
- FID 0288 full access and FID 0289 no access. The Inspection Flow and None options display in Civic Platform. This setting allows the agency administrator to either assign a manual inspection flow or no flow to the inspection group.
- FID 0288 no access and FID 0289 full access. The Inspection Milestone and None options display in Civic Platform. This setting allows the agency administrator to either assign an inspection milestone flow or no flow to the inspection group.

Solution

All

Access

Classic Admin Tools > Inspection > Inspection > Inspection -Edit Page > Inspection Flow option and Inspection Flow button

0289-Enable Inspection Milestone

Version

6.7.0

Description

Enables the Inspection Milestone option in the inspection group configuration, so administrators can select the option, and configure inspection milestones for an inspection group.

Interdependency

| | |
|----------------|---------------------------------|
| Parent | 0133-Admin Inspection Type Sets |
| Interoperation | 0288-Enable Inspection Flow |

FIDs 0288 and 0299 control the two methods of determining the order of the inspection types in the inspection group according to the following settings:

- FID 0288 full access and FID 0289 full access. The Inspection Flow, Inspection Milestone, and None options in Civic Platform. This gives the agency administrator the option to assign a manual inspection flow, an inspection milestone, or no required flow to the inspection group.
- FID 0288 full access and FID 0289 no access. The Inspection Flow and None options display in Civic Platform. This setting allows the agency administrator to either assign a manual inspection flow or no flow to the inspection group.
- FID 0288 no access and FID 0289 full access. The Inspection Milestone and None options display in Civic Platform. This setting allows the agency administrator to either assign an inspection milestone flow or no flow to the inspection group.

Solution

All

Access

Classic Admin Tools > Inspection > Inspection > Inspection -Edit Page > Inspection Milestone option and Inspection Flow button

0290-Admin - Standard Comments

Version

6.7.0

Description

Enables the Standard Comments administration portlet for users to configure standard comment groups and standard comment types, and to add standard comments.

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > Standard Comments

0291-Guide Sheet Template Data

Version

6.7.0

Description

Enables the Application Specific Info Group in the Guide Sheet administration function, so administrators can use the ASI and ASI table definitions for guidesheet options such as fields, drop-down lists, and check boxes.

Interdependency

Parent

| 0124-Admin Inspection Guide Sheet

Solution

All

Access

Classic Admin Tools > Inspection > Guide Sheet > Application Specific Info Group field

0292-Service Management

Version

6.7.0

Description

Enables the Service portlet for administrators to perform the following tasks:

- View the services that users can view when logged into Citizen Access
- Add services for users to view in Citizen Access
- Associate services with license types and address types

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > Service

0294-Structure and Establishment

Version

6.7.0

Description

Controls the Structures and Establishments link in the Accela Administrator Setup portlet, and enables the Structures & Establishments - Type portlet for administrators to configure and manage structure and establishment types.

Interdependency

| | |
|-------|--|
| Child | 0158-Admin Attribute Definition |
| Child | 0159-Admin Attribute Template Definition |

Solution

All

Access

Setup portlet > Structures & Establishments

Setup portlet > Structures & Establishments > Type

0295-Reference Structure and Establishment

Version

6.7.0

Description

- Enables the Structures & Establishments portlet for users to manage reference structures and reference establishments.
- Enables the Structures & Establishments tab in the Parcels portlet for users to manage the reference structures and reference establishments associated with reference parcels, and copy or move associated structures or establishments between genealogically related reference parcels.

Interdependency

| | |
|--------------|--|
| Child of #1 | 0296-Structure and Establishment Condition |
| Child of #1 | 0005-Reference Property Parcels |
| Child of #1 | 0006-Reference Property Addresses |
| Child of #1 | 0008-Reference Licensed Professionals |
| Parent of #2 | 0005-Reference Property Parcels |

Solution

All

Access

Structures & Establishments portlet

Parcels > Structures & Establishments tab

0296-Structure and Establishment Condition

Version

6.7.0

Description

Enables the Conditions tab in the Structures & Establishments portlet for users to add and manage conditions for structures & establishments.f

Interdependency

| | |
|--------|--|
| Parent | 0295-Reference Structure and Establishment |
| Child | 0297-Structure and Establishment History |

Solution

All

Access

Structures & Establishments portlet > Conditions tab

0297-Structure and Establishment History

Version

6.7.0

Description

Displays the Condition History tab when users click a condition in the Condition tab of the Structures & Establishments portlet.

Interdependency

Parent

| 0296-Structure and Establishment Condition

Solution

All

Access

Structures & Establishments portlet > Conditions tab > (After selecting a condition) Condition History tab

0299-Super License Management

Version

6.7.0

Description

Enables the Product License portlet for administrators to view product licenses or import product licenses.

Interdependency

None

Solution

Superagency

Access

Setup portlet > System Tools > Product License

0300-License Management

Version

6.7.0

Description

Enables the Product License portlet for administrators to view product licenses or import product licenses.

Interdependency

None

Solution

All

Access

Setup portlet > System Tools > Product License

0305-Admin Attribute Table Definition

Version

7.0.0

Description

- Enables the Attribute Table administration portlet for assets, so administrators can configure attribute tables.

- Enables the Attribute Tables tab in the Attribute Template administration portlet for both assets and structures & establishments, so administrators can associate attribute tables with attribute templates.

Interdependency

Parent of #2

0159-Admin Attribute Template Definition

Solution

Accela Asset Management

Access

Setup portlet > Assets > Attribute Table

Setup portlet > Assets > Attribute Template > Attribute Tables tab

Setup portlet > Structures & Establishments > Attribute Template > Attributes tab

0306-Work Order Type

Version

7.0.0

Description

Enables the Work Order Types tab in the Work Order Task portlet for administrators to perform the following tasks:

- View the work order types associated to work order tasks
- Assign a work order type to a work order task, or delete the association

Interdependency

Parent

0254-WO Task Definition

Solution

Accela Asset Management

Access

Setup portlet > Work Orders > Work Order Task > Work Order Types tab

0307-Audit Logger Definition

Version

7.0.0

Description

Enables the Audit Log portlet for administrators to configure the fields to display for each audit log.

Interdependency

An audit log type (record/ASI/ASIT, guidesheet, record condition, reference condition, standard condition, document) only works after super agency administrator enables the audit log options in the agency configuration.

Solution

All

Access

Setup portlet > System Tools > Audit Log

0308-Data Manager Export

Version

7.0.0

Description

Enables the Export Jobs panel in the Data Manager portlet for administrators to perform the following tasks:

- Configure export jobs
- Export record types and their associated elements
- Export Standard Choices
- Export Citizen Access Configuration
- Export asset management data

Interdependency

| | |
|----------------|--------------------------|
| Parent | 0318-Administration |
| Interoperation | 0309-Data Manager Import |

Solution

All

Access

Setup portlet > Administration > AA Admin > Data manager > Export Jobs panel

0309-Data Manager Import

Version

7.0.0

Description

Enables the Import Jobs panel in the Data Manager portlet for administrators to perform the following tasks:

- Configure import jobs
- Import record types and their associated elements
- Import Standard Choices
- Import Citizen Access Configuration
- Import asset management data

Interdependency

| | |
|----------------|--------------------------|
| Interoperation | 0308-Data Manager Export |
|----------------|--------------------------|

Parent

0318-Administration

Solution

All

Access

Setup portlet > Administration > AA Admin > Data manager > Import Jobs panel

0310-Admin Education Info

Version

7.0.0

Description

Enables the Education portlet for administrators to create and manage education records, including associating the education records with education providers.

Interdependency

None

Solution

All

Access

Setup portlet > License Certifications > Education

0311-Admin Continuing Education Info

Version

7.0.0

Description

Enables the Continuing Education portlet for administrators to perform the following tasks:

- Create and manage continuing education records, including associating the continuing education records with providers and record types.
- Assign a workflow task to continuing education at the record type level.

Interdependency

None

Solution

All

Access

Setup portlet > License Certifications > Continuing Education

0312-Admin Examination Info

Version

7.0.0

Description

Enables the Examination portlet for administrators to perform the following tasks:

- Create and manage examination records, including associating the examination records with examination providers.
- Assign a workflow task to examinations at the record type level.

Interdependency

None

Solution

All

Access

Setup portlet > License Certifications > Examination

0314-Admin Meeting Calendar

Version

7.3

Description

- Enables the meeting calendar type in the calendar administration portlet, so administrators can perform the following tasks:
 - View all the calendars of Meeting type
 - Create new calendars of Meeting type
- Enables the Meeting Type Maintenance function in the Calendar administration navigation tree for administrators to configure meeting types.

Interdependency

None

Solution

All

Access

Setup portlet > Calendar > Meeting type in the Type field

Setup portlet > Calendar > Meeting Type Maintenance tree node > Meeting option in Calendar Type field

0315-Admin Create New Objects

Version

7.0.0

Description

Enables the Create New button on the toolbar of the Civic Platform console. Users can click the button to select from a drop-down menu of options for creating records or performing other operational tasks.

**Interdependency**

None

Solution

All

Access

Setup portlet > Agency Profile > Create New Objects

Civic Platform Console Toolbar > Create New menu button

0316-Reference Contact Condition

Version

7.0.0

Description

Enables the Condition tab in the Contacts portlet for users to manage conditions for contacts.

Interdependency

Child | 0317-Reference Contact Condition History

Solution

All

Access

Contacts portlet > Conditions tab

0317-Reference Contact Condition History

Version

7.0.0

Description

Displays the Condition History tab when users click a condition in the Condition tab of the Contacts portlet.

Interdependency

Parent | 0316-Reference Contact Condition

Solution

All

Access

Contacts portlet > Conditions tab > (After selecting a condition) Condition History tab

0318-Administration

Version

7.0.0

Description

Enables the AA Admin administration portlet under Setup Administration for administrators to configure record types and configure data manager.

Interdependency

| | |
|-------|------------------------------|
| Child | 0308-Data Manager Export |
| Child | 0309-Data Manager Import |
| Child | 0065-Admin Application Types |

Solution

All

Access

Setup portlet > Administration > AA Admin

0319-Delete ASI and ASIT on existing CAPs

Version

7.0.0

Description

- Provides the “Delete associated transactional data of previous ASI and ASIT on existing records” option in a pop-up window after users change the Application Specific Info Group Code field and then click the Save button in the Application Type - Edit page.
- Provides the “Delete associated transactional records of previous ASI and ASIT on existing CAPs” option in a pop-up window after users change the Application Specific Info Group field and then click the Save button in the Application Specific Info - Edit and Manage Subgroups page.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Application > Application Type > After clicking Save in the Application Type - Edit page

Classic Admin Tools > Application > Application Specific Info > After clicking Save in the Application Specific Info - Edit and Manage Subgroups page

0320-Admin License Verification

Version

7.0.0

Description

Enables the License Verification portlet for administrators to define the record type and insurance/license type expiration relationship by setting permissions and assigning expired license types to application types.

Interdependency

None

Solution

All

Access

Setup portlet > Application > License Verification

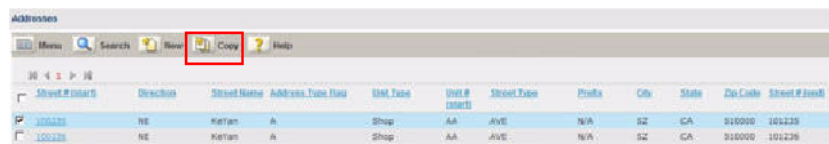
0321-Reference Address Copy

Version

6.7.0

Description

Enables the Copy button in the Addresses portlet, so users to create new addresses by copying from existing ones.

**Interdependency**

Parent

0006-Reference Property Addresses

Solution

All

Access

Addresses portlet > Copy button

0322-Reference Merge Contacts

Version

6.7.0

Description

Enables the Merge button in the Contacts portlet for users to merge two or more contacts into one.

Interdependency

Parent

0084-Reference People Contact

Solution

All

Access

Contacts portlet > Merge

0323-Disable Licensed Professionals Search

Version

6.7.0

Description

When enabled, this FID disables the Search button in the Licensed Professionals portlet, so users cannot search for licensed professionals.

Interdependency

Parent

| 0008-Reference Licensed Professionals

Solution

All

Access

Licensed Professionals portlet > Search button

0324-Admin Receipt Print Audit

Version

6.7.0

Description

Enables the Receipt Print Audit portlet for administrators to view receipt print audit records and to search receipt print audit records.

Interdependency

None

Solution

All

Access

Setup portlet > System Tools > Receipt Print Audit

0326-Define Asset Usage Unit Type

Version

7.0.5

Description

Enables the Usage Types tab in the Asset Type portlet for administrators to perform the following tasks:

- View the usage types list
- Look up usage types and assign to the asset type, or delete the association

Interdependency

Parent

| 0160-Admin AMS Asset Definition

Solution

Accela Asset Management

Access

Setup portlet > Assets > Type > Usage Types tab

0327-Edit My QuickQuery By Administration

Version

7.0.5

Description

Enables the My QuickQueries portlet for administrators to perform the following tasks:

- Specify a portlet and view user-defined QuickQueries in the portlet. The QuickQuery name and user ID identifies each QuickQuery.
- Edit or delete user-defined QuickQueries

Interdependency

Parent

0139-Admin-DataFilter/QuickQuery

Solution

All

Access

Setup portlet > Data Filter & Query > My QuickQueries

0328-Accessibility Mode

Version

7.0.5

Description

Enables section 508 accessibility mode in Civic Platform and Citizen Access.

Interdependency

None

Solution

All

Access

All

0330-Admin Work Order Costing Group Definition

Version

7.1.0

Description

Enables the Cost Group portlet for administrators to define and manage cost groups.

Interdependency

Child | 0161-Admin Work Order Costing Item Definition

Solution

Accela Asset Management

Access

Setup portlet > Work Orders > Cost Group

0331-Trust Account Associated Record

Version

7.1.0

Description

Enables the Associated Record tab in the Trust Account portlet for users to view all the records related to a trust account.

Interdependency

Parent | 0190-Manage Trust Account

Solution

All

Access

Trust Account portlet > Associated Record tab

0332-Daily Cost Rate Definition

Version

7.1.0

Description

- Enables the Cost Rate tab in the Work Order Cost Item portlet for administrators to create and manage cost rates for cost items.
- Enables the Cost Rate tab in the Time Accounting User Profiles portlet for administrators to create and manage cost rates for user profiles.
- Enables the Cost Rates tab in the Assets portlet for users to create and manage cost rates for assets.

Interdependency

| | |
|--------------|---|
| Parent of #1 | 0161-Admin Work Order Costing Item Definition |
| Parent of #2 | 0265-Admin Time Accounting User Profile |
| Parent of #3 | 8189-Asset Data Management |

Solution

Accela Asset Management

Access

Setup portlet > Work Orders > Cost Item > Cost Rates tab

Setup portlet > Time Accounting > User Profiles > Cost Rates tab

Assets portlet > Cost Rates tab

0333-Condition List Audit Log

Version

7.1.0

Description

- Enables the View Log button in the Condition Maintenance administrator portlet for administrators to view condition audit log information.
- Enables the View Log button in various portlets, and then provide the condition as an audit type option for users to view the historical logs on conditions.

Interdependency

The audit log works only if the super agency administrator enables the standard condition audit log option in the agency configuration.

Parent

8458-Complete Record and ASI Audit

Solution

All

Access

Setup portlet > Condition > Condition Maintenance list portlet > View log button

Record portlet > View Log button > Record Details Log button option > Record Condition option in Audit Type in the Audit Log page

Parcels portlet > View Log button

Owners portlet > View Log button

Licensed Professionals portlet > View Log button

Structure & Establishment portlet > View Log button

Assets portlet > View Log button

0334-Condition Detail Audit Log

Version

7.1.0

Description

- Enables the View Log button in the Condition detail tab of the Condition Maintenance administrator portlet for administrators to view condition audit log information.
- Enables the View Log button in the Condition tab in various portlets for users to view the historical logs on conditions.

Interdependency

The audit log works only if the super agency administrator enables the standard condition audit log option in the agency configuration.

Solution

All

Access

Setup portlet > Condition > Condition Details tab > View log button

Record portlet > Condition tab > View Log button

Parcels portlet > Condition tab > View Log button

Owners portlet > Condition tab > View Log button

Licensed Professionals portlet > Condition tab > View Log button

Structure & Establishment portlet > Condition tab > View Log button

Assets portlet > Condition tab > View Log button

0335-Copy or Move Parcel Associated Records

Version

7.1.0

Description

Enables the Copy and Move buttons in the Associated Record List tab of the Parcels portlet, so users can copy or move associated records between genealogically related reference parcels.

Interdependency

None

Solution

All

Access

Parcels portlet > Associated Record List > Copy, Move buttons

0336-User Calendar

Version

7.1.0

Description

Enables the User calendar option in the Calendar administration portlet, so administrators can perform the following tasks:

- View all the calendars of User type
- Create new calendars of User type

Interdependency

None

Solution

All

Access

Setup portlet > Calendar > User type in the Type field

0337-Agency Holiday Calendar

Version

7.1.0

Description

Enables the Agency Holiday calendar option in the Calendar administration portlet, so administrators can perform the following tasks:

- View all the calendars of Agency Holiday type
- Create new calendars of Agency Holiday type

Interdependency

None

Solution

All

Access

Setup portlet > Calendar > Agency Holiday type in the Type field

0338-Licensed Professional Document List

Version

7.2.0

Description

- Enables the Documents tab in the Licensed Professionals portlet for users to upload, manage and download documents related with a licensed professional.
- Displays the People Attachments and Record Attachments options, in the Documents tab of the Record portlet, so that users can click the People Attachments option to view the people attachments associated with the record.

Interdependency

Parent

0008-Reference Licensed Professionals

Solution

All

Access

Licensed Professionals portlet > Documents tab

0339-Inspection Grade Group

Version

7.2.0

Description

Enables the availability of the Inspection Grade Group administration portlet, so administrators can configure inspection grade groups.

Interdependency

None

Solution

All

Access

Classic Admin Tools > Application > Inspection Grade Group

0340-Reference Contact Type Security

Version

7.2.0

Description

Enables the Reference Contacts node in the navigation tree of the Contact Type Setting portlet so administrators can define contact type security on reference contacts.

Interdependency

None

Solution

All

Access

Setup portlet > Contact > Contact Type Setting

0341-Daily Contact Type Security

Version

7.2.0

Description

Enables the Record Contacts node in the navigation tree of the Contact Type Setting portlet so administrators can limit the use of specific contact types by module and define contact type security on record contacts.

Interdependency

None

Solution

All

Access

Setup portlet > Contact > Contact Type Setting

0342-Parcels GIS Attributes Mapping

Version

7.2.0

Description

Enables the display of the GIS Attribute Mapping administration portlet.

Interdependency

None

Solution

All

Access

Setup portlet > Parcels

Setup portlet > Parcels > GIS Attribute Mapping portlet

0343-Contact Relationship

Version

7.2.0

Description

Enables the Related Contacts tab for a contact.

Interdependency

None

Solution

All

Access

Contacts portlet > Related Contacts tab

0344-Show Address on the Contact

Version

7.2.0

Description

Enables the Address tab in the Contacts portlet for users to manage reference addresses for contacts.

Interdependency

Interoperation

| 0006-Reference Property Addresses

Solution

All

Access

Contacts portlet > Address tab

0345-Look Up Address on the Contact Address

Version

7.2.0

Description

Enables the Look Up button in the Contact Address tab of the reference contact portlet for users to look up reference addresses or external addresses, modify and then save them as contact addresses.

Interdependency

The Standard Choice Value of the Standard Choice ENABLE_CONTACT_ADDRESS must be Yes, for the Contact Address tab to display in the reference contact portlet.

Solution

All

Access

Contacts portlet > Contact Address tab

0346-Workflow Designer

Version

7.2.0

Description

Enables the graphic Workflow Designer for administrators to define workflow with master process and sub processes.

Interdependency

FIDs control the few workflow-related functions, not available in Workflow Designer, listed below.

| | |
|----------------|--|
| Interoperation | 0143-Admin Workflow Task Spec Info |
| Interoperation | 0150-Admin Workload and Skillset |
| Interoperation | 0154-Reference Workflow Proximity Alerts |
| Interoperation | 0180-Admin Workflow Task Spec Info Subgroups |
| Interoperation | 0192-Workflow Report Setting |
| Interoperation | 0234-Workflow Calendar |
| Interoperation | 0246-Activities Specific Information |

Solution

All

Access

Setup portlet > Administration > Workflow Designer

0347-Social Media

Version

7.2.0

Description

Enables the Social Media portlet for administrators to configure the integration between Civic Platform and a social media site such as Twitter.

Interdependency

NA

Solution

All

Access

Setup portlet > System Tools > Social Media

0348-AA-AGIS Integration Diagnosis Tool

Version

7.2.0

Description

Enables the GIS Integration Diagnostics portlet for administrators to diagnose and troubleshoot the GIS integration issues.

Interdependency

None

Solution

All

Access

Setup portlet > System Tools > GIS Integration Diagnostics

0349-Contact Management

Version

7.2.0

Description

Enables the Standard Choices portlet for administrators to edit Standard Choices from Civic Platform Vantage360. Currently the portlet allows you to maintain a few Standard Choices related with Contact Management.

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > Standard Choices

0350-Regional Settings

Version

7.2.0

Description

Enables the Regional Setting portlet for administrators to define the phone number country code, and format the ZIP code (or postal code) masks and phone number masks based on the selected country or region.

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > Regional Settings

0351-Admin Set Type

Version

7.3

Description

Enable the Admin Set Type link in the Setup menu.

Interdependency

None

Solution

All

Access

Setup portlet > Application > Set Type

0352-Professional List

Version

7.2.0

Description

Enables the Professionals tab in the Contacts portlet for users to associate professionals with reference contacts, and manage the associated professionals.

Interdependency

None

Solution

All

Access

Contacts portlet > Professionals tab

0353-Contact Identity Fields

Version

7.2.0

Description

Enables reference contact identity settings. By specifying reference contact identifier fields, administrators can enforce the uniqueness of the contacts in the reference database and prevent users from creating duplicate contacts.

Interdependency

None

Solution

All

Access

Setup portlet > Contact > Identity Settings > Reference Contact

0354-Custom Dictionary

Version

7.3

Description

Enables access to the custom dictionary portlet for authorized administrators to create agency-specific custom spell check dictionaries accessible from Civic Platform, Citizen Access, and Mobile Office, and manage terms contained within the custom dictionaries. Custom dictionary users with “full access” can view and manage (add/delete) entries. Users with “read only” access can view the entries, but cannot modify them.

Interdependency

None

Solution

All

Access

Setup portlet > Agency Profile > Dictionary

0355-Reference Contact Relationship

Version

7.3

Description

Enables the Contact Relationship tab in the Contacts portlet for users to configure contact relationship between two reference contacts.

Interdependency

None

Solution

All

Access

Contacts portlet > Contact Relationship tab

0357-Reference Contact Log

Version

7.3

Description

Enables the View Log button in the reference contact portlet for users to view the historical audit logs on reference contacts.

Interdependency

None

Solution

All

Access

Reference Contact > View Log > Contact Log

0360-Account Settings

Version

7.3

Description

Enables the Communication Manager - Account Settings portlet for administrators to configure accounts from which agency users send outgoing emails and SMS text messages.

Interdependency

None

Solution

All

Access

Setup Portlet > Communication Manager > Account Settings

0361-General Settings

Version

7.3

Description

Enables the Communication Manager - General Settings portlet for administrators to configure the connection between the Microsoft Exchange Server and Civic Platform, and establish system-level settings for agency users.

Interdependency

None

Solution

All

Access

Setup Portlet > Communication Manager > General Settings

0362-Duplicate Contact Address Check

Description

Enables the contact address identity settings for administrators to set contact address identity fields, thus to enforce unique identity of contact addresses in each contact.

Interdependency

None

Solution

All

Access

Setup portlet > Contact > Identity Settings > Contact Address

0365-License Certification Info

Description

Enable access to the Education, Continuing Education, and Examination tabs on the Contact Reference portlet.

Interdependency

None

Solution

All

Access

Contact Reference portlet > Education tab

Contact Reference portlet > Continuing Education tab

Contact Reference portlet > Examination tab

0366-License Certification Supervisor

Description

Enable/disable the Approve and Disapprove buttons. Used to validate education/exam records. After approval, data is no longer editable in transaction records. Data remains editable in the contact reference records.

Interdependency

None

Solution

All

Access

Application Record portlet > Education tab, Continuing Education tab, Examination tab

Contact Reference portlet > Education tab, Continuing Education tab, Examination tab

0367-Default Clone Options

Version

7.3.2

Description

Controls the availability of the Default Clone Options form on the Administration Setup portlet. Use this form to set the default data (by record type) to copy from the source record to the new cloned record.

Solution

All

Access

Administration > Setup > Application > Default Clone Options

0368 - Reference Contact Document List

Version

7.3.3

Description

This FID enables the Documents tab in the Contacts portlet for users to upload, manage and download documents related with a reference contact.

Interdependency

| | |
|--------|-------------------------------|
| Parent | 0084-Reference People Contact |
|--------|-------------------------------|

Solution

All

Access

Contacts portlet > Documents tab

0371-Professional List

Description

Enables the Look Up and Delete buttons on the Licensed Professional tab for the Structure/Establishment detail portlet. When enabled, these buttons can be used to locate, then associate/disassociate licensed professionals with the current structure/establishment.

Interdependency

None

Solution

All

Access

Structure & Establishment portlet

7800-Report Menu

Description

Enables the Report Menu function in Civic Platform Classic for users to access the reports that are custom made for specific business practices.

Interdependency

None

Solution

All

Access

Classic Daily > Report > Report Menu

7801-Ad Hoc Reports

Description

Controls exposure of the add hoc report feature.

Interdependency

None

Solution

All

Access

Classic Daily > Reports > Ad Hoc

8006-Application Print Permit

Description

Enables the Permit function in Civic Platform Classic for users to print an application permit.

Interdependency

None

Solution

All

Access

Classic Daily > Application > Permit

8014-Standard Comments and Task List

Version

2.51

Description

Enables the Task List function in Civic Platform Classic for users to view the workflow task list and to edit the workflow task list.

Interdependency

None

Solution**Access**

Classic Daily > Workflow > Task List

8020-Condition Full Privileges

Description

- Enables the Conditions tab in the Record portlet for users to add conditions for records.

- Enables the Conditions tab in the Inspections portlet for users to add conditions for inspections.
- Enables the display of the Condition Notice pop-up window when users click the condition “Learn more...” link in the condition status bar of the record portlet.

Interdependency

None

Solution

All

Access

Record portlet > Conditions tab

Record portlet > Condition Status Bar > (After clicking the “Learn more...” link) Condition Notice pop-up window

Inspections portlet > Conditions tab

8027-Smart Notice

Description

Enables the Smart Notice daily functions in Civic Platform Classic, so users can view the current smart notice.

Interdependency

None

Solution

All

Access

Classic Daily > SmartManager > SmartNotice

8028-Addresses

Description

- Enables the Address tab of the Record portlet for users to search, create, assign and manage addresses (either reference addresses, Tidemark addresses, or daily addresses) of records.
- Enables the Search and Clear button in the Address section of the application intake form, for users to add reference address to a new application.

Interdependency

| | |
|-------|----------------------------------|
| Child | 8175-GIS Objects |
| Child | 8227-PermitsPlus Search Address |
| Child | 8303-Synchronize function in APO |

Solution

All

Access

Record portlet > Address tab

Record portlet > New > (In the application intake form) Address section > Search and Clear buttons

8029-Parcels

Description

- Enables the Parcel tab in the Record portlet for users to add and manage parcels of an application.
- Enables the Search and Clear buttons in the Parcel section of the application intake form, for users to search reference parcels and add them to a record.

Interdependency

| | |
|-------------|------------------------------------|
| Child of #1 | 8281-Inspector Districting |
| Child of #1 | 8327-Search Select Parcel Function |

Solution

All

Access

Record portlet > Parcel tab

Record portlet > New > (In the application intake form) Parcel section > Search and Clear buttons

8030-Owners

Description

- Enables the Owner tab of the Record portlet for users to assign and manage owners of records.
- Enables the Search and Clear buttons in the Owner section of the application intake form, for users to search reference owners and add them to a record.

Interdependency

None

Solution

All

Access

Record portlet > Owner tab

Record portlet > New > (In the application intake form) Owner section > Search and Clear buttons

8031-Contacts

Description

- Enables the Contacts tab in the Record portlet
- Enables the New, Look Up, Remove, Deactivate, Sync From the Reference, and Stop Sync menu buttons in the Contacts tab, for users to add or manage contacts for records.

- Enables the New, Search, Delete, and Set Primary buttons in the contact section of the application intake form, so users can manage the contacts for a record. This section opens when you create a new application or you click the Summary button for a record.

Interdependency

None

Solution

All

Access

Record portlet > Contact tab

Record portlet > New > (In the application intake form) Contact section > New, Search, Delete and Set Primary buttons

8032-Licensed Professionals

Description

Enables the Professionals tab in the Record portlet for users to add or manage licensed professionals for records.

Interdependency

Child

8446-Disable Licensed Professionals Delete

Solution

All

Access

Record portlet > Professionals tab

8033-Additional Information

Description

- Enables the Addtl Info tab in the Record portlet for users to view and edit additional information about records.
- Enables the Addtl Info area in the Additional Information tab for a record and in the Record Information tab for an inspection. So users can view and edit additional information about records from Mobile Office.

Interdependency

None

Solution

All

Access

Civic Platform > Record portlet > Addtl Info tab

Mobile Office > Records > Additional Information tab

Mobile Office > Inspections > Record Information tab > Additional Information subtab

8034-New Application

Description

- Enables the New button in the Record portlet for users to create a record.
- Enable users to submit the staff assignments to a record successfully.

Interdependency

| | |
|------------------------|-------------------------|
| Interoperation with #2 | 8152-WO/SR Group Update |
|------------------------|-------------------------|

Solution

All

Access

Record portlet > New button

Record portlet > Assign menu item > (After users click the Save button) Successful assignment

Record portlet > Record Detail tab > Assign menu item > (After users click the Save button) Successful assignment

8035-Find App

Version

2.5

Description

- Enables the record list display in the Record portlet according to the permissions for the current user.
- When you disable FID 8150, FID 8035 enables the Advanced Search link in the Find Application function in Civic Platform Classic . When users click the Advanced Search link, the Find Application - Search page displays the standard application search fields. When you enable FID 8150, the Find Application - Search page displays the search fields, as customized in the Find Application Profile administration function.
- Enables the Record Search for the Select Record to Copy From function available in the Inspections portlet, or the Inspections tab of the Record portlet.

Interdependency

| | |
|------------------------|--------------------------------|
| Interoperation with #2 | 8150-Find App (Custom) |
| Interoperation with #2 | 8035-Find App |
| Parent of #3 | 8299-Daily-ODS Inspection Gaps |

.

Solution

All

Access

Record portlet

Classic Daily > Application > Find App > Advanced Search link (with FID 8068 enabled)

Classic Daily > Application > Find App (Find Application - Search page) (with FID 8068 disabled)

Inspections portlet > Inspection Detail tab > Select Record to Copy From button > Click the Record Search button

8036-Workflow - 2.5

Obsolete.

8038-Valuation Calculation

Description

Enables the Valuation Calc tab in the record portlet for users to calculate the total valuation (job values) for an application based on the pre-defined standard valuations with occupancies

Interdependency

Child 8406-Edit Valuation Calculator Unit Cost

Solution

All

Access

Record portlet > Valuation Calc tab

8039-PermitsPlus Historical Data

Description

Enables the Data Source field in the Record Search portlet for users to select 'PERMITS" Plus as the source to search for 'PERMITS' Plus A/P/Ds in Civic Platform and associate them to Accela records.

Interdependency

You must configure the Standard Choice ENABLE_PERMITS_PLUS_SEARCH for the search.

Solution

All Modules except superagency

Access

Record portlet > Search button > P+ Permit Plus option in Data Source field

Record portlet > Related Records tab > Search, or Look Up button > P+ Permit Plus option in Data Source field

8047-Hearings (obsolete, replaced by 8483)

Obsolete (see 8229 - Hearing).

8049-Batch Job (old)

Description

Any of the following FIDs can enable the Batch Engine administration portlet:

- 0106-Admin Batch job (the list portlet, the Job Detail tab, Job Schedule tab, and Log tab)
- 0284-Batch Job Maintenance (the list portlet and the Job Detail tab) and 0285-Batch Job Schedule (the Job Schedule tab and the Log tab)
- 8122-Batch Job (the list portlet, the Job Detail tab, Job Schedule tab, and Log tab)
- 8049-Batch Job (old) (the list portlet, the Job Detail tab, Job Schedule tab, and Log tab)

Interdependency

| | |
|----------------|----------------------------|
| Interoperation | 0106-Admin Batch job |
| Interoperation | 0284-Batch Job Maintenance |
| Interoperation | 8122-Batch Job |

Solution

All

Access

Setup portlet > System Tools > Batch Engine
Batch Jobs portlet

8068-Find App (simple search)

Description

Enables the simple search mode in the Find Application function in Civic Platform Classic. Simple search allows users to search applications by Project Name/Application number.

Interdependency

| | |
|-----------------|------------------------|
| Interdependency | 8150-Find App (Custom) |
| Interdependency | 8035-Find App |

Solution

All

Access

Classic Daily > Application > Find Application

8073-App Spec Info

Version

6

Description

- Enables the App Specific Info tab in the Record portlet, so users can manage the ASI about a record.
- Enables the App Specific Info section in the summary portlet for a record, so users can view the ASI about the record.

Interdependency

None

Solution

All

Access

Record portlet > App Specific Info tab

8074-Set Header Maintenance

Version

Updated in 7.2.0

Description

- Enables the Records list tab in the Set portlet for users to view the list of record sets.
- Enables the New, Search, Delete, and Clone buttons for the Records tab in the set portlet.
- Enables the Create a Set button on the Record List tab for a contact and on the Associated Record List tab for a parcel.
- Enables users to mark the Select Existing Set or the Create a New Set option in the Create From Model page of the record portlet.

Interdependency

| | |
|--------------|-----------------------------|
| Child of #1 | 8075-Set Detail Maintenance |
| Parent of #4 | 8264-Create from Model |

Solution

All

Access

Set portlet > Records tab

Contacts portlet > Record List tab

Parcels portlet > Associated Record List tab

Record portlet > Create From Model button > Select Existing Set option

Record portlet > Create From Model button > Create a New Set option

8075-Set Detail Maintenance

Description

Enables the records detail tabs of the Set portlet, so users can manage the details contacts for a set.

Interdependency

| | |
|--------|-----------------------------|
| Parent | 8074-Set Header Maintenance |
|--------|-----------------------------|

| | |
|-------|---------------------------------|
| Child | 8358-Set Comments |
| Child | 8357-Set Conditions |
| Child | 8363-Set Contacts |
| Child | 8361-Set Licensed Professionals |
| Child | 8362-Set Owners |
| Child | 8359-Set Scripts |
| Child | 8364-Set Status Change |
| Child | 8121-Set Payment |
| Child | 8134-Set Workflow Status Change |

Solution

All

Access

Set portlet > Records tab > Detail tabs

8078-New Business License Application

Description

Enables users to create new applications in the license module in Civic Platform Classic.

Interdependency

None

Solution

Licenses

Access

Classic Daily > Application > New App > Select an application type in the license module

8079-Business Licenses Expiration Info

Description

Enables the Renewal Info tab in the Licenses portlet for users to view or edit a License's renewal information.

Interdependency

None

Solution

License

Access

Licenses portlet > Renewal Info tab

8081-Project Maintenance/Navigation

Version

3

Description

Enables the Project function in Civic Platform Classic for users to create and maintain projects.

Interdependency

None

Solution

All

Access

Classic Daily > Project

8085-Inspection Email Notification

Version

4.0/4.2

Description

Enables email notification in the Result Inspections function, so when users select Save in the Result Inspections portlet, the email address confirmation page displays for entering the applicant email address and group email address.

Interdependency

Parent 8145-Inspection Results

Solution

All

Access

Inspections portlet > Menu > Result item > After clicking Save in the Result Inspections portlet

Inspections portlet > Manage Inspection menu > Result Inspections item > After clicking Save in the Result Inspections portlet

8090-Workflow Supervisor

Version

4.0/4.1

Description

- Enables the Supervisor button in the Workflow tab of the Record portlet, so users have supervisory privileges to alter the status of tasks in a workflow process.
- Enables user to freely save/publish comments and annotations in Electronic Document Review PDF attachments, as well as update the file review status of any reviewer.

Interdependency

Parent 8132-Workflow

Solution

All

Access

Record portlet > Workflow tab > Supervisor button

8093-Staff Search

Version

4

Description

Controls how to display the department and staff options when users click the Dept & Staff button to populate department information and staff information in Civic Platform Classic. If you enable the FID, users first select the department and then pick the staff from the available list. If you disable the FID, users provide the staff information first and then select the department and staff.

Interdependency

None

Solution

All

Access

There are a number of pages with the Dept & Staff button. For example:

Classic Daily > Condition > Condition > Condition - Edit page

8097-Manual Application Number Option

Description

Sets the Alt ID field as editable in the application intake form, record summary form, and the Record tab of the Record portlet, so that users can manually enter the Alt ID for a record.

Interdependency

Interoperation | 0270-Sequence Generator

Solution

All

Access

Record (Building, Asset, Inspection...) portlet > Application Intake Form > Alt ID field

Record (Building, Asset, Inspection...) portlet > Record tab > Alt ID field

Record (Building, Asset, Inspection...) portlet > Record tab > Summary button > Alt ID field in the summary form

8098-Agency Switch

Description

Enables the Switch Agency link in the main console of Civic Platform Classic so users can toggle between multiple Agencies.

Interdependency

Civic Platform can enable the ability to toggle between agencies by either FID 8403 or FID 8098. The Multi-Agency switch controlled by FID 8403 offers more functionality and overrides FID 8098 Agency Switch when you set both to Full-Access.

Solution

All Modules

Access

Classic Daily > Switch Agency link

8099-Inspection Calendar Override Authority

Information about this item is unavailable at this time.

8102-People User Defined Attributes

Description

- When users create a new licensed professional, displays the people template fields for entry if users select a license type that associates with a people template.
- When users create a new contact, displays the people template fields for entry if users select a contact type that associates with a people template.

Interdependency

| | |
|--------------|---------------------------------------|
| Parent of #1 | 0008-Reference Licensed Professionals |
| Parent of #2 | 0084-Reference People Contact |

Solution

All

Access

Licensed Professionals portlet > New > (Selecting a license type that associates with a people template) Fields from the people template in the Professional-New page

Record portlet > Professionals tab > New > (Selecting a license type that associates with a people template) Fields from the people template in the Professional-New page

Contacts portlet > New > (Selecting a contact type that associates with a people template) Fields from the people template in the Contact-New page

Record portlet > Professionals tab > New > (Selecting a contact type that associates with a people template) Fields from the people template in the Contact-New page

8103-Structure Tracking

Description

Enables the Structures tab in the Record portlet for users to add and manage structures for an application.

Interdependency

None

Solution

All

Access

Record portlet > Structures tab

8104-Assess Fees

Version

4

Description

- Enables the Fee tab in the record portlet for users to assess one or more fee items included in the fee schedule associated with an application, or, select several fee items and then generate invoice for them.
- Enables the Assess Fee History for users to view the historical actions performed in the Fee tab.

Interdependency

Child | 8271-Fees Recalculate Fees

Solution

All

Access

Record portlet > Fee tab

Record portlet > Assess Fee History tab

8105-User Defined Parcel Attribute

Obsolete.

8106-Void Application

Description

Enables the Void application function in Civic Platform Classic for users to void an application.

Interdependency

None

Solution

All

Access

Classic Daily > Application > Void Application

8107-Cashier-Supervisor

Version

6.5

Description

Enables the Adjust menu item in the Account Detail tab of the Trust Account portlet for users to adjust the value of a trust account.

Interdependency

Parent of #2 | 0190-Manage Trust Account

Solution

All

Access

Trust Account portlet > Account Detail tab > Menu > Adjust menu item

8108-Cashier Payment

Version

4

Description

- Enables the Payment tab in the record portlet for users to process a payment.
- Enables the buttons in the Payment tab. The buttons include: Pay, Apply, Generate Receipt, Refund, Void, and Pay More.

Building Permit ID: 09BLD-00000-00119

Pay Apply Refund Void Generate Receipt Fund Transfer Reports Help

Go To Payment Payment History Professionals (0) Random Audit History (0) Related Records

Total Invoice Amount: \$70.00 Terminal #:
 Total Payment: \$0.00 Cashier ID: ADMIN
 Total Balance: \$70.00 Date: 11/17/2009
 Amount Not Applied: \$0.00

Invoices

| Invoice # | Amount | Paid in Full | Balance |
|----------------------|---------|--------------|---------|
| 2371 | \$70.00 | N | \$70.00 |

Transactions

| Transaction Code | Transactions | Method | Receipt # | Not Applied | Amount | Status | Received | Trust Account ID | Cashier ID | Date |
|------------------|--------------|--------|-----------|-------------|--------|--------|----------|------------------|------------|------|
| 0 records found. | | | | | | | | | | |

Interdependency

| | |
|----------------|---|
| Interoperation | 8436-Daily – Cashier – Apply |
| Interoperation | 8440-Daily – Cashier – Fund Transfer |
| Interoperation | 8439-Daily – Cashier – Generate Receipt |
| Interoperation | 8435-Daily – Cashier – Pay |
| Interoperation | 8445-Daily - Cashier - Pay More |
| Interoperation | 8437-Daily – Cashier – Refund |
| Interoperation | 8437-Daily – Cashier – Refund |

If you set FID 8108 to read only or no access, the configuration for the interdependent FIDs applies to the buttons. For example, if you enable FID 8436, the Apply button still displays.

Solution

All

Access

Record portlet > Payment tab > Pay (Apply, Generate Receipt, Refund, and Void) button

Record portlet > Payment tab > Pay button > (In the payment details page) Pay More button

8110-Application Comment

Version

Updated in 7.2.0

Description

- Enables the Comments tab in the Record portlet for users to view or add comments of a record.
- Enables the display of record comments in the Record Comments field in inspection details.

Interdependency

Child

8340-Application Comments Edit

Solution

All

Access

Record portlet > Comments tab

Record portlet > Inspection tab > Inspection Details > Comments in the Record Comments field

Inspections portlet > Manage Inspection button > Schedule/Reschedule Inspections > Comments in the Record Comments field

Inspections portlet > Inspection Detail tab > Comments in the Record Comments field

8112-Application Cloning

Description

Enables the Clone and Copy menu items in the Record tab of the Record portlet, so users can clone or copy an application.

Interdependency

None

Solution

All

Access

Record portlet > Record Detail tab > Clone menu item

Record portlet > Record Detail tab > Copy menu item

8113-Standard Comments

Version

4

Description

Enables the Standard Comments link for the Comment field (in different places). When users click the link, the standard comments configured by administrators display for selection.

Interdependency

None

Solution

All

Access

Record portlet > Comments tab > (Besides the Comment field) Standard Comments link

Record portlet > Application History tab > (Besides the Comment field) Standard Comments link

Record portlet > Workflow tab > Task Details > (Besides the Comments field) Standard Comments link

Contacts portlet > Conditions tab > (Besides the Comment field) Standard Comments link

Licensed Professionals portlet > Conditions tab > (Besides the Short Comments field) Standard Comments link

Licensed Professionals portlet > Comments tab > (Besides the Comment field) Standard Comments link

8114-ADS New Non-Electronic Documents (old)

Obsolete.

8115-ADS Document List (old)

Obsolete.

8116-V360 Reports

Information about this item is unavailable at this time.

8119-GIS Service

Version

5

Description

- Enables the GIS button in related portlets (such as the Record and Addresses portlets) and tabs (such as the Assets tab in Records portlet). Users can click the GIS button to open the GIS map viewer and to view the selected objects in the map.
- Enables the GIS tab in the Records portlet for users to view the GIS objects associated with the record, and perform functions available in the tab (including Show/Select GIS Objects, Create GIS Objects, and Delete)

Interdependency

| | |
|----------------|--------------------------------------|
| Interoperation | 0197-Admin-PM Schedule Linked Asset |
| Interoperation | 0198-Admin-PM Schedule Skipped Asset |
| Interoperation | 8203-Daily Record Asset |

Solution

All

Access

Record portlet > GIS button

Work Orders portlet > Assets tab > GIS button

And more.

8120-ADS Non-Electronic Documents (old)

Obsolete.

8121-Set Payment

Version

4

Description

Enables the Payment tab in the records detail tabs of the Set portlet, so users can process payments for a set

Interdependency

| | |
|--------|-----------------------------|
| Parent | 8075-Set Detail Maintenance |
|--------|-----------------------------|

Solution

All

Access

Set portlet > Records tab > (After selecting a set) Payment tab

8122-Batch Job

Version

3.7

Description

Any of the following FIDs can enable the Batch Engine administration portlet:

- 0106-Admin Batch job (the list portlet, the Job Detail tab, Job Schedule tab, and Log tab)
- 0284-Batch Job Maintenance (the list portlet and the Job Detail tab) and 0285-Batch Job Schedule (the Job Schedule tab and the Log tab)
- 8122-Batch Job (the list portlet, the Job Detail tab, Job Schedule tab, and Log tab)

- 8049-Batch Job (old) (the list portlet, the Job Detail tab, Job Schedule tab, and Log tab)

Interdependency

| | |
|----------------|----------------------------|
| Interoperation | 0106-Admin Batch job |
| Interoperation | 0284-Batch Job Maintenance |
| Interoperation | 8049-Batch Job (old) |

Solution

All

Access

Setup portlet > System Tools > Batch Engine

Batch Jobs portlet

8130-Parcel Genealogy

Obsolete.

8132-Workflow

Version

4.1

Description

Set to full access to enable the user to assign or reassign tasks, and edit task details, even if another staff member or department assigned the tasks. Set to read only and set FID 8140 Workflow Limit Access by Dept to full access to enable the user to assign or reassign tasks to staff in the user's department but not tasks assigned to other departments. Set to no access to disable workflow functions.

- Enables the Workflow tab in the Record portlet for users to add and manage tasks, including adhoc tasks, for records, and also add and manage task attachments.
- Enables the Workflow History tab in the Record portlet for users to view the workflow task history.
- Enables the Document Review Tasks tab in the My Task portlet for users to take document review tasks.
- Together with FID 8427, enables the Claim and Release buttons in the Workflow Tasks tab of the My Tasks portlet. This button enables a user to assign (by clicking the Claim button) a workflow task to himself/herself, or release the claim (by clicking the Release button).
- Enables the View hyperlink on the Record Attachment List page.

Interdependency

| | |
|----------------------|------------------------------------|
| Child of #1 | 8090-Workflow Supervisor |
| Child of #1 | 8186-Workflow Task Activation |
| Child of #1 | 8470-Time Accounting on Workflow |
| Child of #1 | 8207-Workflow Ad Hoc Tasks - 5.2 |
| Interoperation of #1 | 8140-Workflow Limit Access by Dept |

Interoperation of #4

8427-Claim or Release Task Assignment

Solution

All

Access

Record portlet > Workflow tab

My Tasks portlet > Document Review Tasks tab

8133-Workflow Task Assignments

Version

4.1

Description

- Enables the Assign Task portlet for administrators to assign tasks.
- Enables the Assign button in the Workflow tab of the Record portlet for users to assign a task, or an ad hoc task.
- Enables the Assign button in the Workflow Tasks tab of the My Tasks portlet for users to assign a task.
- Enables the user to assign documents to reviewers and invoke the commands in the Action menu for each attachment on the Attachment Details page.
- Enables the Statistics menu button in the Inspections portlet, for users to view the inspection statistics.

Set to full access to enable the user group to view and reassign the workflow tasks assigned to them. Set to read only to enable the user group to only view assigned workflow tasks. Set to no access to prevent the user group from viewing or editing assigned workflow tasks.

Interdependency

Parent of #2

8132-Workflow

Solution

All

Access

Setup portlet > Workflow & Activity > Assign Task

Record portlet > Workflow tab > (After selecting a task or an ad hoc task) Assign button

My Tasks portlet > Workflow Tasks tab > (After selecting a task) Assign button

Inspections portlet > Menu > Statistics

8134-Set Workflow Status Change

Version

4.1

Description

Enables the Workflow Status tab in the Records detail tabs of the Set portlet, for users to view or change the workflow statuses of the set members.

Interdependency

Parent | 8075-Set Detail Maintenance

Solution

All

Access

Set portlet > Records tab > Status change

8135-Include Insp. History in Workflow History

Information about this item is unavailable at this time.

8137-Calendar Structure

Version

3.9

Description

Enables the Event function for users to add calendar events for an application.

Interdependency

None

Solution

All

Access

Classic Daily > Property > Event

8138-Condition Limit Access by Dept

Version

4

Description

Enables the Condition Type Security administration function for administrators to set the access right (full or read) of an agency or group to condition types.

Interdependency

None

Solution

All modules except SuperAgency

Access

Classic Admin Tools > Agency Profile > Security Policy > Condition Type Security link

8140-Limit Assignments by Dept

Version

Updated in 7.2.0

Description

Enables the Workflow Security portlet for administrators to control access to different workflow processes based on user group privileges. Set to full access and set FID 8132 Workflow to read only to enable the user to assign or reassign tasks to staff in the user's department but not tasks assigned to other departments. For EDR, set to full access to limit assignment of document attachments only to staff within assigner's own department.

Interdependency

Interoperation | 8132-Workflow

Solution

All

Access

Setup portlet > Workflow & Activity > Workflow Security

8141-Application Status

Version

4

Description

Enables the Status tab in the Record portlet, for users to manage the status for a record.

Interdependency

None

Solution

All

Access

Record portlet > Status tab

8142-Application Status History

Version

4

Description

Enables the Status History tab in the Record portlet for users to view the information about all the statuses that exist with a record.

Interdependency

Parent | 8141-Application Status

FID 8142 only works when you disable FID 8141.

Solution

All

Access

Record portlet > (After selecting a record) Status History

8143-Inspection Scheduling

Version

4.2

Description

Enables the Inspection list portlet, and the Inspection tab in the record detail portlet. Set to full access to enable users to schedule or reschedule inspections. Set to None to display a different method of managing inspections in the Inspections portlet and Inspections tab.

Interdependency

| | |
|-------|--|
| Child | 8249-Turn Off the Inspection Tab in CAP List |
| Child | 8281-Inspector Districting |
| Child | 8400-Manage Inspection |
| Child | 8144-Inspection Results Supervisor |
| Child | 8147-Inspection Assignments |
| Child | 8241-Inspection New Inspection |
| Child | 8146-Inspection Route Sheet |
| Child | 8300-Inspections by Unit Number |

Solution

All

Access

Inspection portlet

Record (Building Permit) portlet > Inspection tab

8144-Inspection Results Supervisor

Version

4.2

Description

- Determines whether users have supervisory inspection scheduling privileges. When you set this FID to full access, users can schedule and modify inspections at any time.

For example, if you set this FID to full access and your agency follows an inspection flow process, then users can schedule any inspection, regardless of its place within the inspection flow process. If you set this FID to no access and your agency follows an inspection flow process, then users cannot schedule inspections outside of their inspection flow order.

- Enables users to edit inspection results. For example, suppose an inspector passed a water pipe inspection and shortly thereafter, an inspector discovered a leak or discovered another problem. This feature allows a supervisor to modify the result from the initial "Passed" result to "Failed."

**Note:**

Inspection administrators must be aware of the effects of changing an inspection flow process after a specific inspection flow task has started.

- Enables the Delete button in the Inspections portlet, and the Inspections tab of the record portlet, for users to remove an inspection.
- Enables the Edit Flow button in the Inspections tab of the record portlet, for users to edit the daily side inspection flow by changing milestone value.

Interdependency

y

| | |
|--------|----------------------------|
| Parent | 8143-Inspection Scheduling |
| Parent | 8145-Inspection Results |

Solution

All

Access

Inspections portlet > Manage Inspection menu > Schedule Inspections (Schedule Related Inspections, Reschedule Inspections) menu item

Inspections portlet > Delete button

Records portlet > Inspections tab > Delete button

Records portlet > Inspections tab > Edit Flow button

8145-Inspection Results

Version

4.2

Description

- Enables the Result Inspection function in the Inspections portlet for users to enter inspection results.
- Enables the Inspection Detail tab in the Inspections portlet for users to view, edit and update inspection details.

Interdependency

| | |
|------------------------|-------------------------------------|
| Child of #1 | 8144-Inspection Results Supervisors |
| Child of #1 | 8462-Time Accounting on inspections |
| Child of #1 | 8085-Inspection Email Notification |
| Interoperation with #1 | 8400-Manage Inspection |

To enable users to access the Result Inspections function from the Manage Inspection drop-down menu, you must set FID 8400 to full access.

Solution

All

Access

Inspections portlet > Menu > Result item

Inspections portlet > Manage Inspection menu > Result Inspections item

Inspections portlet > Inspection Detail tab

8146-Inspection Route Sheet

Version

4.2

Description

Enables the Route Sheet button in the Inspections portlet for inspectors to create inspection route sheets and efficiently plan inspections with GIS. This feature helps inspectors minimize the time and distance they travel to complete inspections.

Interdependency

| | |
|--------|--|
| Parent | 8143-Inspection Scheduling |
| Child | 8187-Inspection GIS Route Optimization |
| Child | 8496-Optimize Inspection Route |

Solution

All

Access

Inspections portlet > Route Sheet

8147-Inspection Assignments

Version

4.2

Description

Enables the Assign and Statistics menu items in the Inspections portlet for users to assign an inspection to staff, and view the inspection statistics.

Interdependency

| | |
|--------|----------------------------|
| Parent | 8143-Inspection Scheduling |
|--------|----------------------------|

Solution

All

Access

Inspections portlet > Menu > Assign item

Inspections portlet > Menu > Statistics item

8148-Create From GIS

Version

5

Description

Enables the Create From GIS function in Civic Platform Classic for users to automatically create applications or inspections by GIS area or parcel.

Interdependency

None

Solution

All

Access

Classic Daily > Application > Create From GIS

8149-Inspection Guide Sheet

Version

4.2

Description

Enables the Guide Sheet tab for inspections, so users can enter the inspection results by completing the guidesheet items.

Interdependency

None

Solution

All

Access

Inspections portlet > Guide Sheet tab

Calendar portlet > (After selecting an inspection) Guide Sheet tab

Record portlet > (After selecting an inspection) Guide Sheet tab

8150-Find App (Custom)

Version

5

Description

Enables the Advanced Search link in the Find Application function in Civic Platform Classic. When users click the Advanced Search link, the Find Application - Search page displays the search fields as customized in the Find Application Profile administration function.

Interdependency

| | |
|-----------------|-------------------------------|
| Interdependency | 8068-Find App (simple search) |
| Interdependency | 8035-Find App |

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Solution

All

Access

Classic Daily > Application > Find App > Advanced Search link (with FID 8068 enabled)

Classic Daily > Application > Find App (Find Application - Search page) (with FID 8068 disabled)

8151-Messages

Information about this item is unavailable at this time.

8152-WO/SR Group Update

Version

4

Description

- Enables the Assign menu item for records (such as service requests, work orders), so that users can assign such records to specific departments and to specific users.
- Enables the Group Update menu item in the Work Orders portlet, for users to group update work orders.

Interdependency

Interoperation of #1 | 8034-New Application

Solution

All

Access

Record portlet > Menu > Assign menu item

Record portlet > Record tab > Assign menu item

Work Orders portlet > Group Update menu item

8153-ADS Document Upload (old)

Obsolete.

8154-Application Hierarchy

Version

4.1

Description

Controls application hierarchy feature in Civic Platform Classic. The application hierarchy works must be like the Project Hierarchy functionality existed in the Civic Platform system. You can associate an application with multiple parent applications and child applications.

Interdependency

None

Solution

All Modules except superagency

Access

Classic Daily > Application > Hierarchy

8155-Department Manager

Obsolete.

8157-Application Custom Header

Information about this item is unavailable at this time.

8161-Properties Section Township Range

Version

5

Description

Enables the Section Township Range in Civic Platform Classic for users to configure.

Interdependency

None

Solution

Land

Access

Classic Daily > Property > Properties Section Township Range

8162-Application Limit Access by App Type

Obsolete.

8163-Real Estate Work Request

Information about this item is unavailable at this time.

8164-Real Estate Certification Package

Information about this item is unavailable at this time.

8165-Real Estate Relocation Displace

Information about this item is unavailable at this time.

8166-Real Estate Tract-Component Relationship

Information about this item is unavailable at this time.

8167-ADS Document Delete (old)

Obsolete.

8168-Agency Dynamic Menu

Information about this item is unavailable at this time.

8169-Real Estate Service Request

Information about this item is unavailable at this time.

8170-Real Estate Vendor Work Order

Information about this item is unavailable at this time.

8171-Real Estate Tract-NFI Relationship

Information about this item is unavailable at this time.

8172-Real Estate Department Financials

Information about this item is unavailable at this time.

8173-Real Estate Project Financials

Information about this item is unavailable at this time.

8174-Real Estate Component Financials

Information about this item is unavailable at this time.

8175-GIS Objects

Version

5.1

Description

- Enables the Address Locator button in the Address tab, and the Address Detail tab under the Address tab of the record portlet, for users to locate an address in the GIS map for a record.
- Enables the GIS button in the District tab under the Address tab of the record portlet, for users to locate an address in the GIS map.

Interdependency

| | |
|----------------|--------------------------|
| Parent | 8028-Addresses |
| Interoperation | 8401-GIS Address Locator |

Solution

All

Access

Record portlet > Address tab > Address Locator button

Record portlet > Address tab > Address Detail tab > Address Locator button

Record portlet > Address tab > District tab > GIS button

8176-GIS Area Usage

Version

5

Description

Enables the Cancel From GIS function in Civic Platform Classic for users to cancel inspections by specifying GIS area.

Interdependency

None

Solution

All

Access

Classic Daily > Inspection > Cancel From GIS

8177-Report Management

Version

5

Description

Enables the Report menu item in the Address tab of the Record portlet, so users can view the reports for the selected addresses.

Interdependency

None

Solution

All

Access

Record portlet > Address tab > Menu > Report menu item

8178-Report Runner

Information about this item is unavailable at this time.

8179-Report Scheduler

Information about this item is unavailable at this time.

8180-Report Writer

Information about this item is unavailable at this time.

8181-Report Object Writer

Information about this item is unavailable at this time.

8182-GIS Proximity Alerts

Version

5.1

Description

Enables the Proximity Alerts function under Workflow, so users can configure the GIS proximity alerts for workflow tasks.

Interdependency

None

Solution

All

Access

Classic Daily > Workflow > Proximity Alerts

8183-Application App Spec Info Groups

Obsolete.

8184-Set App Spec Info

Version

6

Description

Enables the App Spec Info Change in Civic Platform Classic for users to make relevant changes.

Interdependency

None

Solution

All

Access

Classic Daily > Set > App Spec Info Change

8185-Set Task Spec Info

Version

6

Description

Enables the Task Spec Info Change in Civic Platform Classic for users to make relevant changes.

Interdependency

None

Solution

All

Access

Classic Daily > Set > Task Spec Info Change

8186-Workflow Task Activation

Version

4.1

Description

Enables the Task Activation button in the Workflow tab of the Record portlet, so users can activate or deactivate tasks, or change optional tasks to required tasks.

Interdependency

Parent | 8132-Workflow

Solution

All

Access

Record portlet > Workflow tab > Task Activation button

8187-Inspection GIS Route Optimization

Version

5.1

Description

Enables the Show Route Map button in an inspection guidesheet for inspectors to review the inspection route or reroute the inspection list using GIS functions.

Interdependency

Child | 8146-Inspection Route Sheet

Solution

All

Access

Inspections portlet > Route Sheet button (and opens the Route Sheet portlet) > Show Route Map button

8188-SmartChart Display

Version

5.1

Description

- Enables the SmartCharts portlet (not SmartCharts 2.0) for users to view SmartCharts.
- Enables the Edit button in the SmartCharts portlet (not SmartCharts 2.0) for users to organize the SmartCharts to display and hide.

Interdependency

Child | 8195-SmartChart Viewer

Solution

All

Access

SmartCharts portlet

8189-Asset Data Management

Version

5.1

Description

- Enables the Assets portlet for users to perform asset management tasks. Enables users to access and manage assets across all solutions and modules in Civic Platform, Citizen Access, GIS, and Mobile Office. Main tasks include:
 - List, search, create, or delete assets
 - Look up assets and add them to work order
 - Look up assets and add them to PM schedules
 - Look up assets and associate them with addresses, parts, and records
 - Specify asset ratings, add conditions, documents, condition assessments
 - Link assets
- Enables the Look Up button in the Assets tab of the Records portlet for users to look up assets and add them to records and work orders.
- If the Assets section displays in the application intake form, enables the Search and Get Address buttons in the section for users to look up assets and associate them to the current record.

Interdependency

| | |
|------------------------|--|
| Child of #1 | 8402-Asset Associated Part |
| Child of #1 | 8282-Asset Condition |
| Child of #1 | 8262-Daily-Asset PM Schedule List |
| Child of #1 | 8399-Asset Rating |
| Child of #1 | 8294-Asset Document Look up |
| Child of #1 | 8308-Asset Condition Assessment Management |
| Child of #1 | 8201-Daily Asset Location |
| Child of #1 | 8277-Asset Usage Tracking |
| Child of #1 | 8290-Calculate Asset Depreciation |
| Child of #1 | 8346-Parent Asset Dependency Flag |
| Child of #1 | 8331-Create WO From Asset List |
| Child of #1 | 8312-Asset Clone |
| Child of #1 | 0332-Daily Cost Rate Definition |
| Interoperation with #1 | 0197-Admin-PM Schedule Linked Asset |
| Interoperation with #1 | 8412-Asset Group Update |

| | |
|------------------------|--------------------------------------|
| Interoperation with #1 | 0198-Admin-PM Schedule Skipped Asset |
| Interoperation with #1 | 8203-Daily Record Asset |

Solution

Accela Asset Management

Access

Assets portlet

Record portlet > New > (In the application intake form) Assets section

8190-Work Order Management

Obsolete.

8191-Work Order Costing

Version

5.1

Description

Enables the Assignments and Costs tab in the Work Orders portlet for users to add and manage assignments and costs for work orders.

Interdependency

| | |
|-------|--|
| Child | 8466-Daily Work Order Costing Group Definition |
|-------|--|

Solution

Accela Asset Management

Access

Work Orders portlet > Assignments and Costs tab

8192-Work Order Parts

Version

5.1

Description

Enables the Part tab in the Work Orders portlet for users to link parts to work orders and perform Issue and Void operations.

Interdependency

| | |
|-------|----------------------------|
| Child | 8273-Parts Inventory |
| Child | 8402-Asset Associated Part |

Solution

Accela Asset Management

Access

Work Orders portlet > Part tab

8193-Work Order Tools

Obsolete.

8194-Work Order Scheduled Work Orders

Obsolete.

8195-SmartChart Viewer

Version

5.1

Description

Enables the link at the SmartChart thumbnails for users to view the full-sized SmartCharts and edit a SmartChart detail.

Interdependency

Child 8188-SmartChart Display

Solution

All

Access

SmartCharts portlet > (After clicking a link at SmartChart thumbnails) Edit button

Record portlet > Menu button > SmartCharts button > (After clicking a link at SmartChart thumbnails) Edit button

8196-SmartChart GIS

Obsolete.

8197-Real Estate FDA Exceptions

Information about this item is unavailable at this time.

8198-Tract Financials Summary

Information about this item is unavailable at this time.

8201-Daily Asset Location

Version

6.1.1

Description

Enables the Address tab in the Assets portlet for users to add and manage asset addresses.

Interdependency

| | |
|--------|----------------------------|
| Parent | 8189-Asset Data Management |
|--------|----------------------------|

Solution

Accela Asset Management

Access

Assets portlet > Address tab

8202-Daily Asset Relationship

Obsolete.

8203-Daily Record Asset

Version

6.1.1

Description

Enables the Assets tab in the Records portlet for users to view and manage assets.

Parent FID 8189 enables the Look Up button in the Assets tab.

Interdependency

| | |
|----------------|----------------------------|
| Interoperation | 8119-GIS Service |
| Interoperation | 8189-Asset Data Management |
| Child | 8412-Asset Group Update |

Solution

Accela Asset Management

Access

Records portlet > Assets tab

8206-Daily-Work Order Close

Version

6.1

Description

Enables the Close menu button in the Work Orders portlet for users to close a work order.

Interdependency

None

Solution

Accela Asset Management

Access

Work Orders portlet > Menu button > Close button

8207-Workflow Ad Hoc Tasks - 5.2

Version

5.2

Description

- Enables the New button in the Workflow tab of the record portlet, so users can create and save an ad hoc task for the record workflow.
- Enables the Submit button in the ad hoc task edit form, for users to edit an existing ad hoc task and save the change.

Interdependency

Parent | 8132-Workflow

Solution

All

Access

Record portlet > Workflow tab > New button

Record portlet > Workflow tab > (Click the link at an ad hoc task) > Submit button

8208-Autopopulate APO Data from GIS

Version

5.1

Description

If you enable this FID, when users attach a GIS object to a record in the application intake form, the address, parcel, and owner (APO) objects that are associated with the GIS object automatically populates to the record.

Interdependency

This FID only works if you set [NEW_SPEAR_FORM_ENABLE](#) to Yes, [ENABLE_AUTO_POPULATE_PARCEL_OWNER](#) to Yes, and [MULTIPLE_APO_GIS_SELECTION](#) to NO.

Solution

All

Access

Record portlet > New > (In the application intake form) Address, Parcel, or Owner section

8209-Single Portlet Data Summary

Version

5.2

Description

- Enables the Application Detail tab in the Record portlet so users can view and can edit application details.
- Enables the Look Up button in the Work Orders tab of the Assets portlet, for users to look up and associate work orders with assets.

Interdependency

None

Solution

All

Access

Record portlet > Detail tab

Record portlet > Summary tab > (After clicking the Application Detail link) Detail tab

Assets portlet > Work Order tab > Look Up button

8210-Workflow My Task List

Obsolete.

8211-List Driven SmartChart

Version

5.2

Description

- Enables the SmartCharts button in the Record portlet. Users can click the button to view the SmartChart thumbnail, and further more to edit the SmartChart.
- Enables the Chart button when users view the details of a rating type by clicking it in the Ratings tab of the Assets portlet.

Interdependency

| | |
|--------------|------------------------|
| Child | 8195-SmartChart Viewer |
| Parent of #2 | 8399-Asset Rating |

Solution

All

Access

Record portlet > Menu button > SmartCharts button

Assets portlet > Ratings tab > (After selecting a rating type) Chart button

8212-Upload EDMS Attachment

Version

6.1.1

Description

- Enables the New button in the Documents tab for users to upload an attachment to the document server for a record, inspection, or parcel.
- Enables the Copy and Move button in the Document tab of the Parcels portlet, so users can move associated documents between genealogically related reference parcels.
- Enables the Look Up button in the Documents tab for users to add documents to a record by looking up from the record associated contacts and licensed professionals.

Interdependency

Parent of #1

8214-View EDMS Attachment List

Solution

All

Access

Record (Inspections, Parcels, or Calendar) portlet > Documents tab > New button

Parcels portlet > Documents tab > Copy, Move buttons

Record portlet > Documents tab > Documents tab > Look Up button

Record portlet > Application Intake Form > Document section > Look Up button

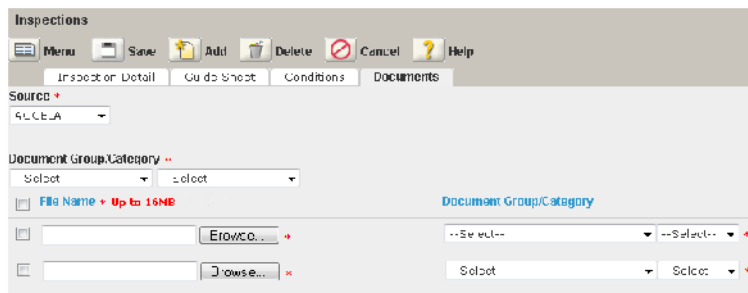
8213-Download EDMS Attachment

Version

Updated in 7.2.0

Description

Enables the Download button in the Documents tab in the Record, Inspection, Asset Condition Assessment, Calendars and Parcels portlet, so users can click the link to download a document.



Interdependency

Parent

8214-View EDMS Attachment List

Solution

All

Access

Record (Inspection, Calendars, Asset Condition Assessment or Parcels) portlet > Documents tab > Download button

8214-View EDMS Attachment List

Version

6.1.1

Description

Enables the Documents tab for users to view and manage attachments for records, inspections, or parcels.

| File Name | Category | Description | Size | Type | Modified Date | Modified By | Source | Department | Display |
|---|----------|--------------------|---------|------------|---------------|--------------|--------|------------|---------|
| <input type="checkbox"/> damaged roof 1.jpg | Pictures | Photograph of da | 3,20 KB | image/jpeg | 11/10/2008 | John Q Smith | | Building | Y |
| <input type="checkbox"/> damaged roof 2.jpg | Pictures | Photograph of f... | 2,5 KB | image/jpeg | 11/10/2008 | John Q Smith | | Building | Y |

Interdependency

| | |
|-------|-----------------------------------|
| Child | 8213-Download EDMS Attachment |
| Child | 8212-Upload EDMS Attachment |
| Child | 8240-Delete EDMS Attachment |
| Child | 8433-Document Permission Settings |
| Child | 8473-EDMS Document URL Link |

Solution

All

Access

Record (Inspection, Calendars, Asset Condition Assessment or Parcels) portlet > Documents tab

8215-GIS Genealogy

Version

5.2

Description

Enables the GIS genealogy in Civic Platform Classic.

Interdependency

None

Solution

All

Access

Classic Daily > Property > GIS

8216-Citizen Fee Update

Information about this item is unavailable at this time.

8217-Fees Credit Card Payment

Information about this item is unavailable at this time.

8218-Citizen User Profile Join Organization

Information about this item is unavailable at this time.

8219-Citizen User Profile

Version

6

Description

Enables the License tab in the PublicUser portlet for administrators to add, remove, and manage the licenses of a public user.

Interdependency

| | |
|----------------|-------------------------------|
| Parent | 8224-Citizen Admin Supervisor |
| Interoperation | 8223-Citizen Admin |

Either FID 8223 or FID 8219 alone can enable the License tab.

Solution

All

Access

Setup portlet > System Tools > PublicUser portlet > License tab

8220-Citizen User Profile Agency Spec Info

Information about this item is unavailable at this time.

8221-Citizen User Profile Organization

Version

6

Description

- Enables the Citizen User Organization portlet for users to view and manage citizen users.
- Enables the Organization portlet for users to view, add and manage organizations.
 - Organization owner can set a new owner (as primary)
 - Users can manage the organization contacts in the Contact List tab of the Organization portlet.
 - Users can delete, view, and edit organization addresses in the Organization Address tab of the Organization portlet.
- Enables the Look Up button in the Associated Public User tab of the Addresses portlet, so users can loop up and associate public users to an address.

Interdependency

Interdependency | 8222-Citizen User Profile Organization Supervisor

Solution

All

Access

Citizen User Organization portlet

Organization portlet

Addresses portlet > Associated Public User tab > Look Up

8222-Citizen User Profile Organization Supervisor

Version

6

Description

Enables the Citizen User Organization portlet for users to create and manage citizen users.

Interdependency

Interdependency | 8221-Citizen User Profile Organization

Solution

All

Access

Citizen User Organization portlet

8223-Citizen Admin

Version

6

Description

Enables the License tab in the PublicUser portlet for administrators to add, remove, and manage the licenses of a public user. Set this FID to read only to prevent changes to public users' information from Civic Platform.

Interdependency

| | |
|----------------|-------------------------------|
| Interoperation | 8219-Citizen User Profile |
| Parent | 8224-Citizen Admin Supervisor |

Either FID 8223 or FID 8219 alone can enable the License tab.

Solution

All

Access

Setup portlet > System Tools > PublicUser portlet > License tab

8224-Citizen Admin Supervisor

Version

6

Description

Enables the PublicUser portlet for administrators to manage public users, including:

- View or create new public users
- Enable or disable public user accounts in agencies
- Associate public users with APO or contacts

Set this FID to read only to prevent changes to public users' information from Civic Platform.

Interdependency

| | |
|-------|---------------------------|
| Child | 8223-Citizen Admin |
| Child | 8219-Citizen User Profile |

Solution

All

Access

Setup portlet > System Tools > PublicUser portlet

8227-PermitsPlus Search Address

Version

6.0.1

Description

- Enables the Search P+ button in the Address tab of the Record tab, so users can look up a 'PERMIT' Plus address to a record.
- Enables the Look up Tidemark address button in the Address tab of the Record tab, so users can look up a Tidemark address to a record.
- Enables the Look up Kiva address button in the Address tab of the Record tab, so users can look up a Kiva address to a record.

- Enables the Search P+, Look up Tidemark address, and Look up Kiva address buttons in the address, parcel and owner (APO) sections of the application intake form for users to associate the APOs from these sources to the new record.

Interdependency

Parent | 8028-Addresses

Solution

All

Access

Record portlet > Address tab > Search P+, Look up Tidemark address, and Look up Kiva address buttons

Record portlet > New > (In the application intake form) Search P+, Look up Tidemark address, and Look up Kiva address buttons

8228-Reports Link

Version

6.1

Description

Enables the ARW Reports function in Civic Platform Classic for users to view ARW reports.

Interdependency

None

Solution

All

Access

Classic Daily > Reports > ARW Reports

8229-Hearings (obsolete, replaced by 8483)

Version

6.1

Description

- Enables the Hearing tab in the record detail portlet for users to view, schedule or cancel hearings for an application.
- Enables the Hearing section in the Summary tab of the record detail portlet.

Interdependency

None.

Solution

All

Access

Record portlet > Hearing tab

Record portlet > Summary tab > Hearing section

8230-Search Applicant

Obsolete.

8231-Set Current User

Obsolete.

8232-Get Parcel And Owner

Version

6.0.3

Description

Enables the Get Parcel & Owner button in the Address section of the application intake form. When users enter an address and click the button, any parcel or owner associated to the address automatically populates in the parcel section and owner section.

Interdependency

None

Solution

All

Access

Record portlet > New button > Parcel section > Get Parcel & Owner button

8233-Search Parcel

Obsolete.

8234-Get Address And Owner

Version

6.0.3

Description

Enables the Get Address & Owner button in the Parcel section of the application intake form. When users enter a parcel number and they click this button, any address or owner associated to the parcel number automatically populates in the address and owner sections.

Interdependency

None

Solution

All

Access

Record portlet > New button > Parcel section > Get Address & Owner button

8235-Search Owner

Obsolete.

8236-Related CAPs-Search

Version

6.1

Description

Enables the Look Up button in the Related Records tab of the Record portlet for users to look up records and add some as related records to the current record.

Interdependency

None

Solution

All

Access

Record portlet > Related Records tab > Look Up button

8238-Payment History

Version

6.1

Description

Enables the Payment History tab in the record portlet for users to view the historical payments for a record.

Interdependency

None

Solution

All

Access

Record portlet > Payment History tab

8240-Delete EDMS Attachment

Version

6.1.1

Description

Enables the Delete button in the Documents tab for users to delete attachments from records, inspections, or parcels.

Interdependency

| | |
|--------|--------------------------------|
| Parent | 8214-View EDMS Attachment List |
|--------|--------------------------------|

Solution

All

Access

Record (Inspection, Calendars, Asset Condition Assessment or Parcels) portlet > Documents tab > Delete button

8241-Inspection New Inspection

Version

6.1

Description

If you set FID 8400 to read only or no access, enables the New button in the Inspection portlet and the Inspection tab of the record details portlet, for users to create new inspections, or associate inspections to an application. If you set FID 8400 to full access, FID 8241 has no effect.

Interdependency

| | |
|----------------|----------------------------|
| Parent | 8143-Inspection Scheduling |
| Interoperation | 8400-Manage Inspection |

Solution

All

Access

Inspection portlet > New button

Record (Building Permit) portlet > Inspection tab > New button

8242-Workflow Calculate Percent Complete

Information about this item is unavailable at this time.

8243-Daily Flow Diagram

Version

6.1.1

Description

Enables the My Navigation portlet for users to follow agency procedures with the visual aid of tasks configured by the agency administrator.

Interdependency

None

Solution

All

Access

My Navigation portlet

8244-Daily-Print Single CAP Detail

Obsolete.

8249-Turn Off the Inspection Tab in CAP List

Version

6.1.2

Description

Disables the Inspection tab in the record detail portlet, even if you set FID 8143 to full access.

Interdependency

Interoperation | 8143-Inspection Scheduling

Only when you set FID 8149 to no access or read only, and you set FID 8143 to full access, does the Inspection tab in the record detail portlet display.

Solution

All

Access

Record (Building Permit) portlet > Inspection Tab

8250-Search My Tasks

Obsolete.

8251-Cashier Session

Version

6.2.1

Description

Enables the Cashier Session portlet for users to take payments and record payment transactions in cashier sessions.

| Session Number | Begin Time | Status | Deposit Slip # | Deposit Date |
|----------------|--------------|-----------|----------------------|----------------------|
| 578 | 01/04/201... | Suspended | <input type="text"/> | <input type="text"/> |

Interdependency

Child | 8259-Cashier Session supervisor

Solution

All

Access

Cashier Session portlet

8253-Showing GIS X/Y Locator

Version

6.1.1

Description

Enables the X/Y GIS Locator button for record addresses in the Address tab of the Record tab, or the Address section in the application intake form, so users can select an address and view its X/Y locator in GIS.

Interdependency

None

Solution

All

Access

Record portlet > Address tab > X/Y GIS Locator button

Record portlet > (When creating a new application) X/Y GIS Locator button in the Address section

8255-Update Inspection Required/Optional Property

Version

6.1.2

Description

Enables users to edit the Required/Optional field for each inspection type in the Inspection Schedule - Inspections List in Civic Platform Classic.

Interdependency

None

Solution

All

Access

Classic Daily > Inspection > Scheduling > Required/Optional field for each inspection type in the Inspection Schedule - Inspections List

8259-Cashier Session Supervisor

Version

4

Description

Enables the Search button in the Cashier Session portlet for users to search sessions and close sessions opened by others. Optionally controls the Deposit Slip # and Deposit Date fields.

Interdependency

Parent

| 8251-Cashier Session

Solution

All

Access

Cashier Session portlet > Search button

8260-Change Due

Obsolete.

8261-Open Cash Drawer

Version

4

Description

Enables the Open Cash Drawer button in the Cashier Session portlet, so users can open the cash drawer after a payment.

Interdependency

None

Solution

All

Access

Cashier Session portlet > Open Cash Drawer button

8262-Daily-Asset PM Schedule List

Version

6.1

Description

Enables the PM Schedules tab in the Assets portlet for users to view the PM Schedules created for the current asset.

Interdependency

Parent

| 8189-Asset Data Management

Solution

Accela Asset Management

Access

Assets portlet > PM Schedules tab

8264-Create from Model

Version

6.1

Description

Enables the Create From Model button for users to create a record based on the template of a model record.

Interdependency

Child | 8074-Set Header Maintenance

Solution

All

Access

Record portlet > Create From Model button

8265-Model Maintenance

Version

6.1

Description

Enables the Model Maintenance portlet for users to create and maintain models based on which to create new applications.

Interdependency

None

Solution

All

Access

Model Maintenance portlet

8266-Check reference object condition

Version

6.1

Description

Enables the display of the condition status bar for a record, if you set the Display Condition Notice field to Yes for a reference object condition (such as address, parcel, and owner) associated with the record.

Interdependency

None

Solution

All

Access

Record portlet > Condition Status Bar

8267-Enable Payment by Trust Account

Version

6.1.2

Description

- Provides the Trust Account drop-down list for users to select for payments in the Payment tab of the Record portlet.
- Provides the Trust Account option as a payment method when users pay in the Payment Processing portlet.

Interdependency

None

Solution

All

Access

Record portlet > Payment tab > Trust Account field

Payment Processing portlet > Pay button > Trust Account option in the Payment Method field

8268-Display Option/Required of the Inspection

Version

6.1.2

Description

Displays the Required/Optional field for each inspection type in the Inspection Schedule - Inspections List in Civic Platform Classic.

Interdependency

None

Solution

All

Access

Classic Daily > Inspection > Scheduling > Required/Optional field for each inspection type in the Inspection Schedule - Inspections List

8269-Customize Content

Version

6.1.3

Description

Enables the Customize Content menu item in list portlets for users to customize how information displays in the list.

Interdependency

None

Solution

All

Access

List portlet (such as Record portlet, Professionals portlet, etc) > Menu button > Customize Content button

8270-App Spec Info Table

Version

6.2

Description

- Enables the App Specific Info Tables tab in the Record portlet, so users can manage the ASI tables for a record.
- Enables the App Specific Info Tables section in the summary portlet for a record, so users can view the ASI tables for the record.

Interdependency

Child | 8397-ASI Table Delete

Solution

All

Access

Record portlet > App Specific Info Tables tab

8271-Fees Recalculate Fees

Version

6.2

Description

Enables the ReCalc button in the Fee tab of the record portlet for users to recalculate the fees for the application after some modifications to the fees, for example, job value change.

Interdependency

Parent | 8104-Assess Fees

Solution

All

Access

Record portlet > Fee tab > ReCalc button

8272-Application Condition History

Version

6.2

Description

Displays the Condition History tab when users click a condition in the Conditions tab of the Record portlet, for users to view the condition history.

Interdependency

None

Solution

All

Access

Record portlet > Condition tab > (After selecting a condition) Condition History tab

8273-Parts Inventory

Version

6.2

Description

- Enables the Part Inventory portlet for users to access the part inventory list, and perform part transactions.
- Enables the Look Up button in the Part tab of the Work Orders portlet for users to search and select parts for a work order.

Interdependency

| | |
|--------------|--------------------------------|
| Child of #1 | 8275-Parts Supply |
| Child of #1 | 8449-Part Transaction-Adjust |
| Child of #1 | 8274-Part Transaction-Issue |
| Child of #1 | 8447-Part Transaction-Receive |
| Child of #1 | 8450-Part Transaction-Reserve |
| Child of #1 | 8448-Part Transaction-Transfer |
| Child of #1 | 8451-Part Transaction-Void |
| Child of #1 | 8276-Parts Contact |
| Parent of #2 | 8192-Work Order Parts |

Solution

Accela Asset Management

Access

Part Inventory portlet

Work Orders portlet > Part tab > Look Up button

8274-Part Transaction-Issue

Version

7.0.5

Description

Enables the Issue as a transaction type option in the Part Transaction tab of the Part Inventory portlet, so users can create or modify or void issue-type part transactions.

Interdependency

Parent | 8273-Parts Inventory

Solution

Accela Asset Management

Access

Part Inventory portlet > Part Transaction tab > (New or modify) Issue as Transaction Type

8275-Parts Supply

Version

6.2

Description

Enables the Part Supply tab in the Part Inventory portlet for users to view the part supply list, which is the calculation result from part transactions.

Interdependency

Parent | 8273-Parts Inventory

Solution

Accela Asset Management

Access

Part Inventory portlet > Part Supply tab

8276-Parts Contact

Version

6.2

Description

Enables the Part Contact tab in the Part Inventory portlet for users to look up contacts and add them as contacts for parts, or delete some contacts from parts.

Interdependency

Parent | 8273-Parts Inventory

Solution

Accela Asset Management

Access

Part Inventory portlet > Part Contact tab

8277-Asset Usage Tracking

Version

6.2

Description

Enables the Usages tab in the Assets portlet for users to add and manage asset usages.

Interdependency

Parent | 8189-Asset Data Management

Solution

Accela Asset Management

Access

Assets portlet > Usages tab

8278-PM Schedule Log

Version

6.2

Description

Enables the PM Schedule Log tab in the PM Schedules portlet for users to search and view the historical generations of work orders based on a PM schedule.

Interdependency

None

Solution

Accela Asset Management

Access

PM Schedules portlet > PM Schedule Log tab

8279-New Mechanism to Create Work Order

Version

6.2

Description

Enables the Create by Form button in the Work Orders portlet for users to create a single work order using a template.

Interdependency

None

Solution

Accela Asset Management

Access

Work Orders portlet > Create by Form button

8280-Linking Work Order to PM Schedule

Version

6.2

Description

Enables the PM Schedule tab in the Work Orders portlet for users to view and edit the PM schedule that generated the work order.

Interdependency

None

Solution

AMS

Access

Work Orders portlet > PM Schedule tab

8281-Inspector Districting

Version

6.2

Description

- Enables the District tab in the Addresses and Parcels portlets, and also the Addresses and Parcels tabs in the Record portlet, for users to perform the following tasks:
 - Select and associate inspection districts with addresses
 - Select and associate inspection districts with parcels
 - Copy or move associated districts between genealogically related reference parcels
- Enables the Assign Inspector menu item in the Inspections portlet for users to assign an inspections to inspectors.

Interdependency

| | |
|--------------|----------------------------|
| Parent of #1 | 8029-Parcels |
| Parent of #2 | 8143-Inspection Scheduling |

Solution

All

Access

Inspections portlet > Menu > Assign Inspector item

Record portlet > Addresses tab > District tab

Record portlet > Parcels tab > District tab

Addresses portlet > District tab

Parcels portlet > District tab

8282-Asset Condition

Version

6.2

Description

Enables the Condition tab in the Assets portlet for users to add and manage asset conditions.

Interdependency

Parent | 8189-Asset Data Management

Solution

Accela Asset Management

Access

Assets portlet > Condition tab

8285-Show Cashier ID on Payment

Version

6.1.2

Description

- Displays the Cashier ID column in the Transactions list section in the Payment tab, and in the transaction details after users click a receipt ID in the transaction list.
- Displays the Cashier ID column in the Payment History tab.

Interdependency

None

Solution

All

Access

Record portlet > Payment tab > Cashier ID column in the Transactions section

Record portlet > Payment History tab > Cashier ID column

8286-Fees Print Receipt Summary

Version

6.2

Description

When you enable this FID, it enables customized receipt summaries, and it transforms the receipt ID field from static text to a hyperlink, which gives users easy access to the receipt summary.

When you set this FID to full access, receipt ID numbers become hyperlinks. When clicked, the hyperlink opens the receipt summary for viewing and printing. If you set this FID to no access, receipt ID numbers remain standard numeric text.

Interdependency

None

Solution

All

Access

Credit Card/Check Transactions portlet > Search Transaction > Open a historical transaction

Payment Processing portlet > History tab > Open a transaction > Print Receipt

POS > Transaction > Receipt ID (hyperlink)

Record portlet > Payment tab > Receipt ID (hyperlink)

Set > Payment tab > Receipt ID (hyperlink)

Set > Sets > Payment tab > Receipt ID (hyperlink)

Trust Account portlet > Transactions tab > Receipt ID (hyperlink)

8287-Auto-Assign Inspection

Version

6.2

Description

Enables the Auto Assign function for users to assign inspections automatically to inspectors according to the inspection type configuration by the agency administrator.

Interdependency

| | |
|--------|------------------------|
| Parent | 8400-Manage Inspection |
|--------|------------------------|

Solution

All

Access

Inspections portlet > Manage Inspection button > Schedule Inspections> (In the Schedule Inspections page) Auto Assign button

Inspections portlet > Manage Inspection button > Reschedule Inspections > (In the Reschedule Inspections page) Auto Assign button

Record portlet > Inspection tab > Manage Inspection button > Schedule Inspections> (In the Schedule Inspections page) Auto Assign button

Record portlet > Inspection tab > Manage Inspection button > Reschedule Inspections > (In the Reschedule Inspections page) Auto Assign button

Calendar portlet > Inspection Type calendars > Manage Inspection button > Schedule Inspections> (In the Schedule Inspections page) Auto Assign button

Calendar portlet > Inspection Type calendars > Manage Inspection button > Reschedule Inspections> (In the Reschedule Inspections page) Auto Assign button

8288-Fees Point Of Sale

Version

6.2

Description

- Enables the Point of Sale (POS) portlet for users to perform the following tasks:
 - Create POS transactions
 - Manage fee items and receive payments for a POS transaction, and generate receipts
 - View POS transaction details

- Allows users to add POS items into a payment list by clicking the Add POS Item button in the Payment Processing portlet.

Interdependency

| | |
|----------------|---------------------------------|
| Interoperation | 8393-Payment Processing |
| Interoperation | 8417-Enable POS |
| Child | 8289-Fees Point of Sale Refunds |

Solution

All

Access

Point of Sale portlet

Payment Processing portlet > Add POS Item button

8289-Fees Point Of Sale Refunds

Version

6.2

Description

Enables the Refund button in the Payment tab of the Point of Sale portlet for users to refund a point of sale payment.

Interdependency

| | |
|--------|-------------------------|
| Parent | 8288-Fees Point of Sale |
|--------|-------------------------|

Solution

All

Access

Point of Sale portlet > Payment tab > Refund button

8290-Calculate Asset Depreciation

Version

6.2

Description

- Enables the Group Depreciation menu button in the Assets portlet for users to select multiple assets and calculate their depreciation values one time.
- Enables the Recalculate Value button in the Asset Detail tab of the Assets portlet for users to recalculate the asset value.
- Enables the Depreciation History menu button in the Asset Detail tab of the Assets portlet for users to view the historical asset depreciation values.

Interdependency

| | |
|--------|----------------------------|
| Parent | 8189-Asset Data Management |
|--------|----------------------------|

Solution

Accela Asset Management

Access

Assets portlet > Menu button > Group Depreciation button

Assets portlet > Asset Detail tab > Recalculate Value button

Assets portlet > Asset Detail tab > Menu button > Depreciation History button

8291-Jetspeed Console Customization

Version

6.2

Description

Enables the Console Options link in the Civic Platform console, so that users can customize the portlets displayed in the current console, My Console.

Interdependency

None

Solution

Console Options link

Access

Daily > Jetspeed Console

8292-Create Multiple Related CAPs

Version

6.2

Description

Enables the Clone Multi in the Related Records tab of the Record portlet to create multiple child records by cloning.

Interdependency

None

Solution

All

Access

Record portlet > Related Records tab > Clone Multi button

8293-Open New Related CAP in SPEAR

Version

6.2

Description

Enables the Clone Sgl in the Related Records tab of the Record portlet to create a single child record by cloning.

Interdependency

None

Solution

All

Access

Record portlet > Related Records tab > Clone Sgl button

8294-Asset Document Look up

Version

6.3.2

Description

Enables the Look Up button in the Documents tab of the Assets portlet, so users can look up documents in an asset.

Interdependency

Parent

8189-Asset Data Management

Solution

Accela Asset Management

Access

Assets portlet > Documents tab > Look Up button

8295-Real Estate Land Acquisition Summary

Information about this item is unavailable at this time.

8296-Cash Drawer

Information about this item is unavailable at this time.

8298-LocationQuery

Information about this item is unavailable at this time.

8299-Daily-ODS Inspection Gaps

Version

6.3.0

Description

Enables the Select Record to Copy From in the Inspections portlet, or the Inspections tab of the record portlet, for users to copy an inspection.

Interdependency

None

Solution

Child | 8035-Find App

Access

Inspections portlet > Inspection Detail tab > Select Record to Copy From button

8300-Inspections by Unit Number

Version

6.3.0

Description

Enables the Unit Nbr field for inspections (during scheduling or route sheet management), for users to enter the number of inspection type units required to complete the inspection.

Interdependency

Parent | 8143-Inspection Scheduling

Solution

All

Access

Inspections portlet > Manage Inspection button > Schedule Inspections, Reschedule Inspections button

Inspections portlet > Manage Inspection button > Schedule Inspections, Reschedule Inspections button

Calendar portlet > Manage Inspection button > Schedule Inspections, Reschedule Inspections button

Record portlet > Manage Inspection button > Schedule Inspections, Reschedule Inspections button

Inspections portlet > Route Sheet button

Calendar portlet > Route Sheet button

8301-Using Credit Card For Payment

Version

6.3.0

Interdependency

Civic Platform integrates with a third-party online payment service for payment processing.

Description

If the FID is full access, when a user makes a payment using the Credit Card payment method, Civic Platform requests the third-party online payment service to process the payment.

Access

Payment Processing portlet > Payment tab > Select the Credit Card payment method > Pay button

Record portlet > Fee tab > Invoice & Pay > Select the Credit Card payment method > Save button

Record portlet > Pay tab > Pay > Select the Credit Card payment method > Save button

8302-Using Check For Payment

Version

6.3.0

Interdependency

Civic Platform integrates with a third-party online payment service for payment processing.

Description

If the FID is full access, when a user makes a payment using the Check payment method, Civic Platform requests the third-party online payment service to process the payment.

Access

Payment Processing portlet > Payment tab > Select the Credit Card payment method > Pay button

Record portlet > Fee tab > Invoice & Pay > Select the Credit Card payment method > Save button

Record portlet > Pay tab > Pay > Select the Credit Card payment method > Save button

8303-Synchronize Function in APO

Version

6.2.1

Description

Enables the Synchronize button in the Address Detail tab under the Address tab of the Record portlet, so users can synchronize the current address information to the external APO source.

Interdependency

Parent | 8028-Addresses

Solution

All

Access

Record portlet > Address tab > Address Detail tab > Synchronize button

8304-Search Credit Card/Check Transaction

Version

6.3.0

Description

Enables the Credit Card/Check Transactions Search portlet for users to search online payment history information.

Interdependency

None

Solution

All

Access

Credit Card/Check Transactions portlet

8305-Reports Portlet

Version

6.3.0

Description

Controls the Reports portlet for users to access the list of reports that are applicable to the user group they belong to.

Interdependency

None

Solution

All

Access

Reports portlet

8307-Reports Menu

Information about this item is unavailable at this time.

8308-Asset Condition Assessment Management

Version

6.3.0

Description

- Enables the Condition Assessment tab in the Assets portlet for users to view the condition assessments associated with assets.
- Enables the Asset Condition Assessment portlet for users to schedule, manage maintenance, and manage quality reviews for asset groups.
- Enables the Asset Condition Assessment feature for users to access and manage asset condition assessments from Mobile Office.

Interdependency

| | |
|--------------|---|
| Parent of #1 | 8189-Asset Data Management |
| Child | 8309-Asset Condition Assessment Observation |
| Child | 8310-Asset Condition Assessment Linked Work Order |

Solution

Accela Asset Management

Access

Assets portlet > Condition Assessment tab

Asset Condition Assessment portlet

Mobile Office > Assessments tab

Mobile Office > Assets tab > New Assessment button

Mobile Office > Assets tab > Asset detail page > Actions fly-out menu > New Assessment button

Mobile Office > Assets tab > Assessments tab

8309-Asset Condition Assessment Observation

Version

6.3.0

Description

Enables the Observation tab in the Asset Condition Assessment portlet for users to create, edit, and view asset condition assessment observations.

Interdependency

Parent | 8308-Asset Condition Assessment Management

Solution

Accela Asset Management

Access

Asset Condition Assessment portlet > Observation tab

8310-Asset Condition Assessment Linked Work Order

Version

6.3.0

Description

Enables the Work Order tab in the Asset Condition Assessment portlet for users to create or associate a work order to an asset condition assessment.

Interdependency

Parent | 8308-Asset Condition Assessment Management

Solution

Accela Asset Management

Access

Asset Condition Assessment portlet > Work Order tab

8312-Asset Clone

Version

6.3.0

Description

Enables the Clone button in the Asset Detail tab of the Assets portlet for users to clone an asset.

Interdependency

Parent | 8189-Asset Data Management

Solution

Accela Asset Management

Access

Assets portlet > Asset Detail tab > Clone button

8313-Fee Item Note

Version

6.2.1

Description

Enables the Notes field for fee items in the Fee Calculator under Assess Fee function, so users can add notes for fee items.

Interdependency

None

Solution

All

Access

Classic Daily > Fee > Assess Fee > Notes field in Fee Calculator

8314-Adjusted column

Version

6.2.1

Description

Enables the Adjusted field for fee items in the Fee Calculator under Assess Fee function, so users can add adjustment value for fee items.

Interdependency

None

Solution

All

Access

Classic Daily > Fee > Assess Fee > Adjusted field in Fee Calculator

8315-Copy Inspection and Guide Sheet

Version

6.3.1

Description

Enables the Copy menu item in the Guide Sheet tab for users to copy a guidesheet from an inspection and apply it to another one.

Interdependency

Interoperation

| 8343-Copy Guide Sheet

Solution

All

Access

Inspections portlet > Guide Sheet tab > Copy button in the drop-down list of Menu

Record portlet > Inspection tab > Guide Sheet tab > Copy button in the drop-down list of Menu

8317-Workflow Calendar

Version

6.3.2

Description

Displays the Workflow Calendar drop-down list for users to select and assign a workflow calendar to an ad hoc task or a workflow task.

Interdependency

None

Solution

All

Access

Record portlet > Workflow tab > New button > Workflow Calendar field

Record portlet > Workflow tab > (After selecting a task) Assign button > Workflow Calendar field

My Tasks portlet > Workflow Tasks tab > (After selecting a task) Assign button > Workflow Calendar field

8318-Adhoc and Workflow Together

Version

6.3.2

Description

- Enables the Adhoc Tasks Present button in the Workflow management page in Civic Platform Classic, so users can directly go to the Adhoc Task details from there.
- Enables the Workflow Present button in the Adhoc management page in Civic Platform Classic, so users can directly go to the Workflow details from there.

Interdependency

None

Solution

All

Access

Classic Daily > Workflow > Workflow > (After selecting a task) Adhoc Tasks Present button

Classic Daily > Workflow > Adhoc Task > (After selecting a task) Workflow Present button

8322-Attach GIS Object

Version

6.4.0

Description

Enables the GIS button in the Address, Parcel, Owner, and Associated GIS Features sections in the application intake form, so users can attach GIS objects to the application by searching in the GIS map viewer.

Interdependency

None

Solution

All

Access

Record portlet > New > (In the application intake form) GIS button in the Address, Parcel, Owner, and Associated GIS Features sections

Record portlet > (After selecting a partial application) Validate button in the Address, Parcel, Owner, and Associated GIS Features sections

8323-Update Related Caps

Version

6.3.2

Description

Enables the Update Related Records in the Related Records tab of the Record portlet to update multiple related applications at one time.

Interdependency

None

Solution

All

Access

Record portlet > Related Records tab > Update Related Records button

8324-Create CAP-Validate

Version

6.3.2

Description

Enables the Validate button in the application intake form to assist users in validating the entry for the new application.

Interdependency

None

Solution

All

Access

Record portlet > New > (In the application intake form) Validate button

Record portlet > (After selecting a partial application) Validate button

8325-Save Work in Progress of CAP

Version

6.3.2

Description

Enables the Save without Submit button, in the application intake form, for users to save an application without submitting it to the system. Civic Platform assigns an application number to the application saves the record as a partial application. You cannot arrange a workflow or schedule an inspection for the partial application.

Interdependency

None

Solution

All

Access

Record portlet > New > (In the application intake form) Save without Submit button

Record portlet > (After selecting a partial application) Save without Submit button

8326-Fee Estimate

Version

6.4.0

Description

Enables the Estimate Fee button in the application intake form for users to assign a fee schedule to the application and then estimate the fees.

Interdependency

None

Solution

All

Access

Record portlet > New > (In the application intake form) Estimate Fee button

Record portlet > (After selecting a partial application) Estimate Fee button

8327-Search Select Parcel Function

Version

6.4.0

Description

Enables the Search and Select button in the Parcel tab of the record portlet, so users can perform a parcel search, and if there is only one search result, directly add the result to the parcel list of the record.

Interdependency

| | |
|--------|--------------|
| Parent | 8029-Parcels |
|--------|--------------|

Solution

All

Access

Record portlet > Parcel tab > Search and Select button

8329-App Spec Info Supervisor

Version

6.4.1

Description

Enables users as ASI supervisors, to edit ASI and ASI table fields configured as Supervisor Edit Only.

Interdependency

None

Solution

| | |
|--------|--------------------------|
| Parent | 8073-App Spec Info |
| Parent | 8270-App Spec Info Table |

Access

Record portlet > App Specific Info tab > “Supervisor Edit Only” Fields

Record portlet > App Specific Info Table tab > “Supervisor Edit Only” Fields

8330-People Info Table

Version

6.4.1

Description

When users create a new licensed professional, displays the people info table fields for entry if users select a license type that associates with some people info table.

Interdependency

| | |
|--------|---------------------------------------|
| Parent | 0008-Reference Licensed Professionals |
|--------|---------------------------------------|

Solution

All

Access

Licensed Professionals portlet > New > (Selecting a license type that associates with a people info table) Fields from the people info table in the Professional-New page

Record portlet > Professionals tab > New > (Selecting a license type that associates with a people info table) Fields from the people info table in the Professional-New page

8331-Create WO From Asset List

Version

6.4.1

Description

Enables the New button in the Assets portlet for users to create new work orders to associate with the selected assets.

Interdependency

| | |
|--------|----------------------------|
| Parent | 8189-Asset Data Management |
|--------|----------------------------|

Solution

Accela Asset Management

Access

Assets portlet > New button > Creates new record.

8332-Evidence

Version

6.4.2

Description

Enables the Evidence tab in the Record portlet for users to track the details, chain of custody and disposition of evidence for cases (records).

Interdependency

| | |
|-------|--------------------------|
| Child | 8334-Evidence Supervisor |
|-------|--------------------------|

Solution

All

Access

Record portlet > Evidence tab

8333-Void Invoiced But Unpaid Fee

Version

6.5

Description

Enables the Void button in the Fee List tab of the Record portlet, so users can void an invoiced but unpaid fee.

Interdependency

| | |
|-----------------|--------------------|
| Interdependency | 8348-Void Paid Fee |
|-----------------|--------------------|

| | |
|-----------------|-------------------|
| Interdependency | 8366-Void Payment |
|-----------------|-------------------|

Always enable FID 8333 with FID 8348 if you want to void an application fee. Enable FID 8333 with FID 8366 if you want to void fees associated with Point of Sale transactions.

Solution

All

Access

Record portlet > Fee List tab > Void

8334-Evidence Supervisor

Version

6.4.2

Description

Enables supervisor permission for the current user, so users can track the chain of custody for evidence. For a user with normal permission the Chain of Custody field is read only.

Interdependency

| | |
|--------|---------------|
| Parent | 8332-Evidence |
|--------|---------------|

Solution

All

Access

Record portlet > Evidence tab > Chain of Custody field

8335-Application Status Security

Information about this item is unavailable at this time.

8336-Recalculate Production Units

Version

6.4.1

Description

Enables the Recalculate button in the Work Orders portlet for users to recalculate production unit function of work orders after the agency changes some of the default or estimated standard values for a work order type.

Interdependency

None

Solution

Accela Asset Management

Access

Work Orders portlet > Menu button > Recalculate button

8337-Production History

Version

6.4.1

Description

Enables the Production History tab in the Work Order portlet for users to track the production history of work orders.

Interdependency

None

Solution

Accela Asset Management

Access

Work Order portlet > Production History tab

8338-WO Task tab on Work Order

Version

6.5.0

Description

Enables the Work Order Task tab in the Work Orders portlet for users to manage tasks for work orders.

Interdependency

Child | 8339-Maintenance WO Task on Work Order

Solution

All

Access

Work Orders portlet > Work Order Task tab

8339-Maintenance WO Task on Work Order

Version

6.5.0

Description

Enables the New, Look Up, and Delete buttons in the Work Order Task tab in the Work Orders portlet for users to create and manage tasks for work orders.

Interdependency

Parent | 8338-WO Task tab on Work Order

Solution

All

Access

Work Orders portlet > Work Order Task tab > New, Look Up, and Delete buttons

8340-Application Comments Edit

Version

Updated in 7.2.0

Description

- Enables users to edit an existing comment in the Comments tab of the Record portlet.
- Enables users to edit an existing comment in the Record Comments field in inspection details.

Interdependency

Parent | 8110-Application Comment

Solution

All

Access

Record portlet > Comments tab > (After clicking the link of a comment) Comment edit box

Record portlet > Inspection tab > Inspection Details > Edit link besides the Record Comments field

Inspections portlet > Manage Inspection button > Schedule/Reschedule Inspections > Edit link besides the Record Comments field

Inspections portlet > Inspection Detail tab > Edit link besides the Record Comments field

8341-Auto Pay

Version

6.5.0

Description

Enables the Invoice & Pay button in the Fee tab of the Record portlet for users to automatically pay for fee items with the associated trust account.

Interdependency

Parent | Child-Auto Create Trust Account

Solution

All

Access

Record portlet > Fee tab > Invoice & Pay

8342-Auto Create Trust Account

Version

6.5.0

Description

Enables users to create a trust account to pay for the fee items, when no associated trust account exists and users click the Invoice & Pay button in the Fee tab of the Record portlet.

Interdependency

Parent | 8341-Auto Pay

Solution

All

Access

Record portlet > > Fee tab > Invoice & Pay button

8343-Copy Guide Sheet

Version

6.5

Description

Enables the Copy menu item in the Guide Sheet tab for users to copy a guidesheet from an inspection and apply it to another one.

Interdependency

Interoperation | 8315-Copy Inspection and Guide Sheet

Solution

All

Access

Inspections portlet > Guide Sheet tab > Copy button in the drop-down list of Menu

Record portlet > Inspection tab > Guide Sheet tab > Copy button in the drop-down list of Menu

8344-Carrying Over Failed Guide Sheet Items

Version

6.5

Description

When users reschedule a failed inspection, displays a dialog for users to select whether to carry over failed guidesheet items from the failed inspection to the rescheduled one.

Interdependency

Parent | 8400-Manage Inspection

Solution

All

Access

Inspections portlet > Manage Inspection button > Reschedule Inspections

Record portlet > Inspection tab > Manage Inspection button > Reschedule Inspections

Calendar portlet > Inspection Type calendars > Manage Inspection button > Reschedule Inspections

8345-User Inspection Calendar

Version

6.5

Description

Enables the Inspection Calendar views in the Calendar portlet for users to manage inspection schedules in the inspection calendars.

Interdependency

None

Solution

All

Access

Calendar portlet > Calendar by Type tree node > Inspection Type tree node

Calendar portlet > Calendar by Inspection Type tree node

8346-Parent Asset Dependency Flag

Version

6.5

Description

Displays the Dependent Parent check box as an asset field. If users mark the check box, the parent asset is dependent on the current asset. When the current asset status changes, Civic Platform updates the parent asset status.

Interdependency

| | |
|--------|----------------------------|
| Parent | 8189-Asset Data Management |
|--------|----------------------------|

Solution

All

Access

Assets portlet > Asset Detail tab > Dependent Parent check box (as an asset field)

8347- User Event Calendar

Version

6.5

Description

Enables the Event Calendar views in the Calendar portlet for users to manage event schedules in the event calendars.

Interdependency

None

Solution

All

Access

Calendar portlet > Calendar by Type tree node > Event tree node

8348-Void Paid Fee

Version

6.5

Description

Enables the Void button in the Fee List tab of the Record portlet, so users can void an invoiced and paid fee.

Interdependency

| | |
|-----------------|-----------------------------------|
| Interdependency | 8333-Void Invoiced But Unpaid Fee |
|-----------------|-----------------------------------|

Always enable FID 8333 with FID 8348 if you want to void an application fee.

Solution

All

Access

Record portlet > Fee tab > Void button

8349-Parcel Set Detail

Version

6.5

Description

Enables the Parcels tab in the Set portlet for users to create and manage parcel sets.

Interdependency

| | |
|-------|-----------------------------------|
| Child | 8351-Parcel Set Create CAPs |
| Child | 8352-Parcel Set Create Conditions |
| Child | 8353-Parcel Set Create Owners |
| Child | 8355-Parcel Set Execute Script |

Solution

All

Access

Set portlet > Parcels tab

8350-Edit Parcel Set Members

Version

6.5

Description

Enables the Set Member tab in the Parcels detail tabs of the Set portlet, so users can add set members for a parcel set.

Interdependency

Parent | 8349-Parcel Set Detail

Solution

All

Access

Set portlet > Parcels tab > (After selecting a set) Set Member tab

8351-Parcel Set Create CAPs

Version

6.5

Description

Enables the Create Records tab in the Parcels detail tabs of the Set portlet, so users can create records and record sets from a parcel set.

Interdependency

Parent | 8349-Parcel Set Detail

Solution

All

Access

Set portlet > Parcels tab > (After selecting a set) Create Records tab

8352-Parcel Set Create Conditions

Version

6.5

Description

Enables the Conditions tab in the Parcels detail tabs of the Set portlet, so users can apply conditions to a parcel set.

Interdependency

Parent | 8349-Parcel Set Detail

Solution

All

Access

Set portlet > Parcels tab > (After selecting a set) Conditions tab

8353-Parcel Set Create Owners

Version

6.5

Description

Enables the Owner tab in the Parcels detail tabs of the Set portlet, so users can add owners for a parcel set.

Interdependency

Parent | 8349-Parcel Set Detail

Solution

All

Access

Set portlet > Parcels tab > (After selecting a set) Owner tab

8355-Parcel Set Execute Script

Version

6.5

Description

Enables the Execute Script button in the Parcels detail tabs of the Set portlet, so users can run a pre-configured EMSE script on the set members of a set.

Interdependency

Parent | 8349-Parcel Set Detail

Solution

All

Access

Set portlet > Parcels tab > Execute Script

8356-Set Cloning

Version

6.5

Description

Enables the Clone button in the Records tab of the Set portlet for users to select a set and clone.

Interdependency

None

Solution

All

Access

Set portlet > Records tab > Clone button

8357-Set Conditions

Version

6.5

Description

Enables the Condition tab in the records detail tabs of the Set portlet, so users can add conditions to a set. Civic Platform applies the conditions to the set members simultaneously.

Interdependency

Parent | 8075-Set Detail Maintenance

Solution

All

Access

Set portlet > Records tab > (After selecting a set) Condition tab

8358-Set Comments

Version

6.5

Description

Enables the Comment tab in the records detail tabs of the Set portlet, so users can add comments for a set.

Interdependency

Parent | 8075-Set Detail Maintenance

Solution

All

Access

Set portlet > Records tab > (After selecting a set) Comment tab

8359-Set Scripts

Version

6.5

Description

Enables the Execute Script button in the records detail tabs of the Set portlet, so users can run a pre-configured EMSE script on the set members of a set.

Interdependency

Parent | 8075-Set Detail Maintenance

Solution

All

Access

8361-Set Licensed Professionals

Version

6.5

Description

Enables the Professionals tab in the records detail tabs of the Set portlet, so users can add and manage professionals for a set

Interdependency

| | |
|--------|-----------------------------|
| Parent | 8075-Set Detail Maintenance |
|--------|-----------------------------|

Solution

All

Access

Set portlet > Records tab > (After selecting a set) Professionals tab

8362-Set Owners

Version

6.5

Description

Enables the Owner tab in the records detail tabs of the Set portlet, so users can add and manage owners for a set.

Interdependency

| | |
|--------|-----------------------------|
| Parent | 8075-Set Detail Maintenance |
|--------|-----------------------------|

Solution

All

Access

Set portlet > Records tab > (After selecting a set) Owner tab

Set portlet > Records tab > Set detail tab > Execute Script button

8363-Set Contacts

Version

6.5

Description

Enables the Contact tab in the records detail tabs of the Set portlet, so users can add and manage contacts for a set.

Interdependency

| | |
|--------|-----------------------------|
| Parent | 8075-Set Detail Maintenance |
|--------|-----------------------------|

Solution

All

Access

Set portlet > Records tab > (After selecting a set) Condition tab

8364-Set Status Change

Version

6.5

Description

Enables the Status tab in the records detail tabs of the Set portlet, so users can set a status for a set

Interdependency

Parent | 8075-Set Detail Maintenance

Solution

All

Access

Set portlet > Records tab > (After selecting a set) Status tab

8365- Inheritable editable

Version

6.5

Description

Enables the display of the Inheritable field as a standard Condition field, so users can set Yes or No for child records to inherit conditions from their parent.

Interdependency

None

Solution

All

Access

Record (Building, Application) portlet > Conditions tab > Inheritable field

8366-Void Payment

Version

6.5

Description

Enables the Void button in the Fee List tab of the Record portlet, so users can void a point of sale fee.

Interdependency

Interdependency | 8333-Void Invoiced But Unpaid Fee

Enable FID 8333 with FID 8366 if you want to void fees associated with point of sale transactions.

Solution

All

Access

Record portlet > Fee List tab > Void

8367-Manage Batch Invoice

Version

6.5

Description

Enables the Invoices portlet for users to group multiple invoices in a batch and process them together as one unit.

Interdependency

None

Solution

All

Access

Invoices Portlet

8369-User Time Accounting Daily

Version

6.6.0

Description

- Enables the Time Accounting portlet for users to view and edit time accounting records
- Assigns normal-user permission to the current user group in the Time Accounting portlet, so a user in the user group can view and edit the time accounting records created by himself/herself.

Interdependency

| | |
|-------|-------------------------------------|
| Child | 8375-Time Accounting Administrator\ |
| Child | 8376-Time Accounting Supervisor |

Solution

All

Access

Time Accounting portlet

8370-Set of Sets Detail

Version

6.7.0

Description

Enables the Sets tab in the Set portlet for users to combine similar sets (for example, record sets) into a set of sets to facilitate convenient ways for batch analysis and processing.

Interdependency

| | |
|-------|--------------------------|
| Child | 8373-Fee Analysis |
| Child | 8372-Set Analysis |
| Child | 8371-Set of Sets Members |
| Child | 8374-Set of Sets Payment |

Solution

All

Access

Set portlet > Sets tab

8371-Set of Sets Members

Version

6.7.0

Description

Enables the Set Member tab in the Sets detail tabs of the Set portlet for users to view and manage sets in a set of sets.

Interdependency

| | |
|--------|-------------------------|
| Parent | 8370-Set of Sets Detail |
|--------|-------------------------|

Solution

All

Access

Set portlet > Sets tab > (After selecting a set) Set Member tab

8372-Set Analysis

Version

6.7.0

Description

Enables the Set Analysis tab in the Sets detail tabs of the Set portlet. This tab allows users to view the fee status (including the total invoice balance and fees paid) related to all the record set members in a set of sets.

Interdependency

| | |
|--------|-------------------------|
| Parent | 8370-Set of Sets Detail |
|--------|-------------------------|

Solution

All

Access

Set portlet > Sets tab > (After selecting a set) Set Analysis tab

8373-Fee Analysis

Version

6.7.0

Description

Enables the Fee Analysis tab in the Sets detail tabs of the Set portlet. This tab allows users to view the fees (including the total record fees, payments, and balances due) related to all the record set members in a set of sets.

Interdependency

| | |
|--------|-------------------------|
| Parent | 8370-Set of Sets Detail |
|--------|-------------------------|

Solution

All

Access

Set portlet > Sets tab > (After selecting a set) Fee Analysis tab

8374-Set of Sets Payment

Version

6.7.0

Description

Enables the Payment tab in the Sets detail tabs of the Set portlet for users to process payments for a set of sets.

Interdependency

| | |
|--------|-------------------------|
| Parent | 8370-Set of Sets Detail |
|--------|-------------------------|

| | |
|-------|-------------------|
| Child | 8404-Void Payment |
|-------|-------------------|

Solution

All

Access

Set portlet > Sets tab > (After selecting a set) Payment tab

8375-Time Accounting Administrator

Version

6.6.0

Description

- Assigns administrative permission to the current user group in the Time Accounting portlet, so the users in the user group can view and edit any time accounting records for which any other user has access.
- Enables the Lock flag in the time accounting details for the users to lock or unlock a time accounting record.

Interdependency

Parent | 8369-User Time Accounting Daily

Solution

All

Access

Time Accounting portlet

8376-Time Accounting Supervisor

Version

6.6.0

Description

- Assigns supervisory permission to the current user group in the Time Accounting portlet, so the user in the user group can view and edit any time accounting records created by users within their user group.
- Enables the Lock flag in the time accounting details for the users to lock or unlock a time accounting record.

Interdependency

Parent | 8369-User Time Accounting Daily

Solution

All

Access

Time Accounting portlet

8377-Select From Multiple Inspection Groups

Version

6.6.0

Description

Enables the Inspection Group drop-down list in the Pending Inspections portlet, so users can select and create pending inspections from any inspection group. When you disable this FID, users can only select and create pending inspections from the inspection group associated with the application type.

Interdependency

None

Solution

All

Access

Calendar portlet > Calendar by Type tree node > Inspection Type tree node > Inspections tab

8378-Address Set Detail

Version

6.6.0

Description

Enables the Addresses tab in the Set portlet for users to create and manage address sets.

Interdependency

Child [8379-Address Set Members](#)

Solution

All

Access

Set portlet > Addresses tab

8379-Address Set Members

Version

6.6.0

Description

Enables the Set Member tab in the Addresses detail tabs of the Set portlet, so users can add and manage addresses in an address set.

Interdependency

Parent [8378-Address Set Detail](#)

Solution

All

Access

Set portlet > Addresses tab > (After selecting a set) Set Member tab

8380-Address Set Comments

Version

6.6.0

Description

Enables the Comments tab in the Addresses detail tabs of the Set portlet, so users can add comments to an address set.

Interdependency

Parent [8378-Address Set Detail](#)

Solution

All

Access

Set portlet > Addresses tab > (After selecting a set) Comments tab

8381-Address Set Condition

Version

6.6.0

Description

Enables the Conditions tab in the Addresses detail tabs of the Set portlet, so users can apply conditions to an address set.

Interdependency

| | |
|--------|-------------------------|
| Parent | 8378-Address Set Detail |
|--------|-------------------------|

Solution

All

Access

Set portlet > Addresses tab > (After selecting a set) Conditions tab

8382-Address Set Execute Script

Version

6.6.0

Description

Enables the Execute Script button in the Addresses detail tabs of the Set portlet, so users can run a pre-configured EMSE script on the set members of a set.

Interdependency

| | |
|--------|-------------------------|
| Parent | 8378-Address Set Detail |
|--------|-------------------------|

Solution

All

Access

Set portlet > Addresses tab > Execute Script button

8383-Licensed Professional Set Detail

Version

6.6.0

Description

Enables the Licensed Professional tab in the Set portlet for users to create and manage licensed professional sets.

Interdependency

| | |
|-------|--|
| Child | 8385-Licensed Professional Set Comments |
| Child | 8386-Licensed Professional Set Condition |

| | |
|-------|---|
| Child | 8387-Licensed Professional Set Execute Script |
| Child | 8384-Licensed Professional Set Members |

Solution

All

Access

Set portlet > Licensed Professional tab

8384-Licensed Professional Set Members

Version

6.6.0

Description

Enables the Set Member tab in the Licensed Professional detail tabs of the Set portlet, so users can add set members for a licensed professional set.

Interdependency

| | |
|--------|---------------------------------------|
| Parent | 8383-Licensed Professional Set Detail |
|--------|---------------------------------------|

Solution

All

Access

Set portlet > Licensed Professional tab > (After selecting a set) Set Member tab

8385-Licensed Professional Set Comments

Version

6.6.0

Description

Enables the Comment tab in the Licensed Professional detail tabs of the Set portlet, so users can add comments for a licensed professional set.

Interdependency

| | |
|--------|---------------------------------------|
| Parent | 8383-Licensed Professional Set Detail |
|--------|---------------------------------------|

Solution

All

Access

Set portlet > Licensed Professional tab > (After selecting a set) Comment tab

8386-Licensed Professional Set Condition

Version

6.6.0

Description

Enables the Condition tab in the Licensed Professional detail tabs of the Set portlet, so users can add condition for a licensed professional set.

Interdependency

Parent | 8383-Licensed Professional Set Detail

Solution

All

Access

Set portlet > Licensed Professional tab > (After selecting a set) Condition tab

8387-Licensed Professional Set Execute Script

Version

6.6.0

Description

Enables the Execute Script button in the Licensed Professional detail tabs of the Set portlet, so users can run a pre-configured EMSE script on the set members of a set

Interdependency

Parent | 8383-Licensed Professional Set Detail

Solution

All

Access

Set portlet > Licensed Professional tab > Execute Script

8388-Reference Address Comments

Version

6.6.0

Description

Enables the Comments tab in the Addresses portlet for users to add and manage comments for an address.

Interdependency

Parent | 0006-Reference Property Addresses

Solution

All

Access

Addresses portlet > Comments tab

8389-Reference Licensed Professional Comments

Version

6.6.0

Description

Enables the Comments tab in the Licensed Professionals portlet for users to add and manage comments for a licensed professional.

Interdependency

Parent | 0008-Reference Licensed Professionals

Solution

All

Access

Licensed Professionals portlet > Comments tab

8390-CAP Type picker with Tree

Version

6.6.0

Description

If enabled, displays the record type picker besides the Record Type field in the Record New page, so users can click the picker and select the record type from the tree view.

If disabled, displays the record type selection drop-down boxes, so users select the record type from the drop-down options.

Interdependency

None

Solution

All

Access

Record portlet > New button > Record Type field in the Record New page

8391-Create Multiple CAPs for Parcels

Version

6.6.0

Description

Enables the “Create one Record for all Parcels” and “Create one Record for each Parcel” options in the Record New page, so users can create records based on their requirement.

Interdependency

None

Solution

All

Access

Record portlet > New button > “Create one Record for all Parcels” and “Create one Record for each Parcel” options in the Record New page

8393-Payment Processing

Version

6.6.0

Description

- Enables the Payment tab and the Pay button in the Payment Processing portlet for users to process payments for records.
- Enables the Add Renewals button in the Payment Processing portlet for users to add records for renewal.

Interdependency

| | |
|----------------|-------------------------|
| Interoperation | 8288-Fees Point Of Sale |
| Child | 8417-Enable POS |

Solution

All

Access

Payment Processing portlet > Payment tab

Payment Processing portlet > Pay button

Payment Processing portlet > Add Renewals button

8394-Payment History

Version

6.6.0

Description

Enables the History tab in the Payment Processing portlet for users to view transaction history.

Interdependency

None

Solution

All

Access

Payment Processing portlet > History tab

8395-CAP Summary

Version

6.6.0

Description

Enable the Summary tab for records (applications), so users can click the Summary tab and view the application summary together with hyper links to application detail portlets.

Interdependency

Child | 8441-Initiated Product Info

Solution

All

Access

Record portlet > Summary tab

8397-ASI Table Delete

Version

6.6.1

Description

Enables the check box for the ASI table entries in the App Specific Info Tables tab of the Record portlet, so users can mark an ASI table entry and delete from a record.

Interdependency

Parent | 8270-App Spec Info Table

Solution

All

Access

Record portlet > App Specific Info Tables tab > Check box (enabled) or each ASI table entry

8398-Cap Renewal

Version

6.6.0

Description

Enable the Renewal tab in the Record portlet for users, including public users, to renew a record.

Interdependency

None

Solution

All

Access

Record portlet > Renewal tab

8399-Asset Rating

Version

6.6

Description

- Enables the Ratings tab in the Assets portlet for users to create and manage ratings for an asset.

- Enables the Ratings tab in the Asset Condition Assessment portlet for users to view and pre-calculate condition assessment ratings.

Interdependency

| | |
|-------------|-----------------------------|
| Parent | 8189-Asset Data Management |
| Child of #1 | 8211-List Driven SmartChart |

Solution

All

Access

Assets portlet > Ratings tab

Asset Condition Assessment portlet > Ratings tab

8400-Manage Inspection

Version

6.6.0

Description

- Enables the Manage Inspection drop-down menu in the Inspections portlet or the Calendar portlet. The Manage Inspection menu comprises the following menu items: Schedule Inspections, Schedule Related Inspections, Reschedule Inspections, Result Inspections, Cancel Inspections, Display Inspections in ACA, and Hide Inspections in ACA.
- Enables the Inspections section in the Summary tab of a record.

Interdependency

| | |
|----------------------|---|
| Parent of #2 | 8395-Cap Summary |
| Parent of #1 | 8143-Inspection Scheduling |
| Child of #1 | 8287-Auto-Assign Inspection |
| Child of #1 | 8344-Carrying over failed Guide Sheet Items |
| Interoperation of #1 | 8241-Inspection New Inspection |
| Interoperation of #1 | 8145-Inspection Results |

Solution

All

Access

Inspections portlet > Manage Inspection button

Calendar portlet > Manage Inspection button

Record portlet > Manage Inspection button

Record portlet > Summary tab > Inspection section

8401-GIS Address Locator

Version

6.5.0

Description

Enables the Address Locator button in the Address section when users create a new work order or when users view the summary form of a work order.

Interdependency

| | |
|----------------|------------------|
| Interoperation | 8175-GIS Objects |
|----------------|------------------|

Solution

AMS

Access

Work Orders portlet > Record tab > Summary button > Address section in the summary form > Address Locator button

Work Orders portlet > Create New button > Address section in the application intake form > Address Locator button

8402-Asset Associated Part

Version

Updated in 7.2.0

Description

- Enables the Associated Parts tab in the Assets portlet for users to look up parts and associate them with an asset. This user access control is applicable to both Civic Platform and Mobile Office users.
- Enables the Standard Parts button in the Part tab of the Work Orders portlet, so users can add standard parts for a work order.

Interdependency

| | |
|--------------|----------------------------|
| Parent of #1 | 8189-Asset Data Management |
| Parent of #2 | 8192-Work Order Parts |

Solution

All

Access

Assets portlet > Associated Parts tab

Work Orders portlet > Part tab > Standard Parts button

8403-Multi Agency Switch

Version

6.7.0

Description

Enables the Switch Agency drop-down field in the main console so users can toggle between multiple Agencies. The functionality differs a little between Civic Platform Vantage360 and Civic Platform Classic. The following descriptions summarize the differences:

- For Civic Platform Vantage360:

- Full access: When set to Full-Access and you define the user as a Delegate User, an agency drop-down list displays in the Vantage360 console. The user can toggle between agencies by selecting an agency from this drop-down list.
- Read only and no access: Users do not have privileges to switch between agencies. The Agency drop-down list does not display to users, even if you define them as a Delegate User.
- For Civic Platform Classic:
 - Full access: A Delegate User views an agency drop-down list in the upper area of Civic Platform. The user can toggle between agencies by selecting an agency from this drop-down list.
 - Read only and no access: The new multiple agency switch is not available. The user can only use the older existing switch logic, from FID 8098 Agency Switch, if enabled.

Table 123: FID 8403 Multi-Agency Switch

| FID Setting | Regular Super Agency User | Delegate User from Super Agency | Regular Sub-agency User |
|---|---|--|---|
| Full Access set at both the Parent and Sub-agencies | The user does not view the new Agency Switch drop-down list. You must assign user to a delegate user account at another agency. | The new "Agency Switch" drop-down list is available at the top of the super agency page. User toggles between agencies to which they have access. User can perform regular user functions based on the delegate user permissions on the User ID at the sub-agency. | Not Applicable. No Super Agency Access. |
| Full Access set at Super Agency and Read Only set at the Sub-agency | The user does not view the new Agency Switch drop-down list. You must assign user to a delegate user account at another agency. | The new "Agency Switch" drop-down list is available at the top of the super agency page. User toggles between agencies to which they have access. User can only view information to which they have permissions set on the delegate User ID at the sub-agency. | Not Applicable. No Super Agency Access. |
| Full Access set at Super Agency and No Access set at the Sub-agency | The user does not view the new Agency Switch drop-down list. You must assign user to a delegate user account at another agency. | The new "Agency Switch" drop-down list is available at the top of the super agency page. The drop-down list populates the agencies to which they have access. User does not have access to this sub-agency. The option disappears from the list of available agencies in the drop-down list. | Not Applicable. No Super Agency Access. |
| Read Only or No-Access set at Super Agency | Not Applicable | The new "Agency Switch" functionality is not available. | Not Applicable. No Super Agency Access. |

Interdependency

Civic Platform can enable the ability to toggle between agencies by either FID 8403 or FID 8098. The Multi-Agency switch controlled by FID 8403 offers more functionality and overrides FID 8098 Agency Switch when you set both to Full-Access.

Solution

All

Access

Civic Platform Console > Switch Agency drop-down field

8404-Void Payment

Version

6.7.0

Description

Enables the Void button in the Payment tab in the Sets detail tabs of the Set portlet for users to void payments for a set of sets.

Interdependency

Parent | 8374-Set of Sets Payment

Solution

All

Access

Set portlet > Sets tab > (After selecting a set) Payment tab > Void button

8405-Structure and Establishment

Version

6.7.0

Description

Enables the Structures & Establishments tab in the Record portlet for users to look up and add structures and establishments to a record.

Interdependency

None

Solution

All

Access

Structures & Establishments portlet

8406-Edit Valuation Calculator Unit Cost

Version

6.7.0

Description

Set the Unit Cost field as editable in the Valuation Cal tab of the Record portlet for users to change the unit cost.

Interdependency

Child | 8038-Valuation Calculation

Solution

All

Access

Record portlet > Valuation Calc tab > Unit Cost field

8408-Edit Application Status History

Version

7.0.0

Description

Enables users to edit or delete the entries in the Status History tab of the Record portlet.

FID 8408 includes the Record Status History audit log.

Interdependency

None

Solution

All

Access

Record portlet > Status History tab

8409-Workflow Delete and Assign

Version

7.0.0

Description

Enables the Delete & Assign Workflow button in the Workflow History tab of the Record portlet, so users can delete and assign workflow.

Interdependency

None

Solution

All

Access

Record portlet > Workflow tab > Menu button > Delete & Assign Workflow button

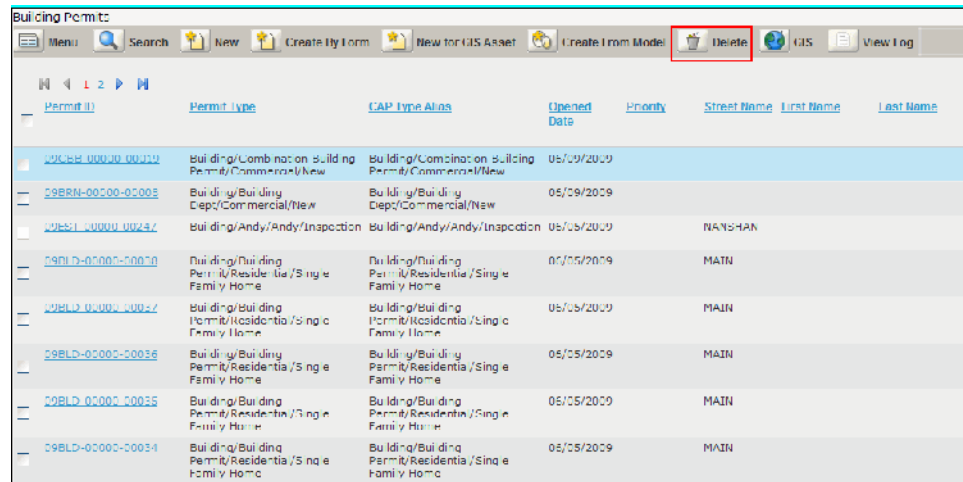
8410-Delete CAPs

Version

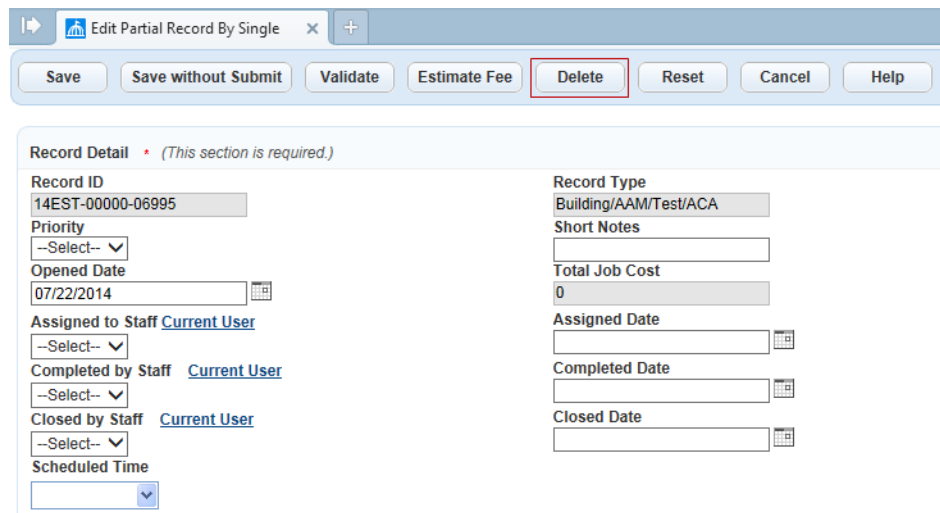
7.0.0

Description

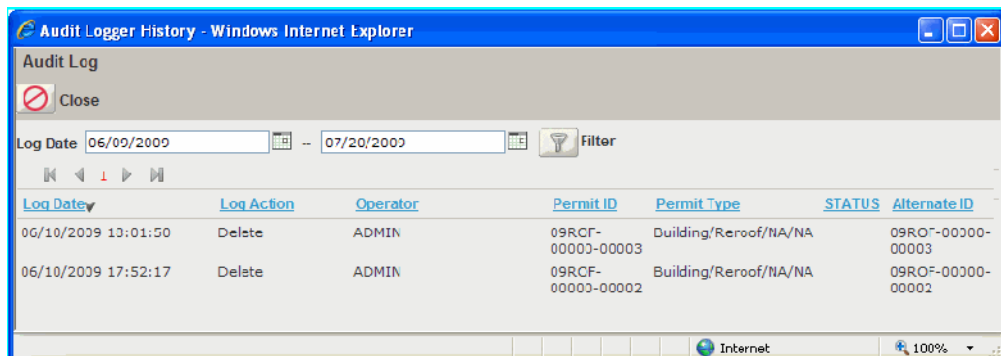
- Enables the Delete button in the Record portlet for users to select and delete records from database.



- Enables the Delete button on the application intake form for partial records.



- Enables user to view a log of deleted records. The deleted records log displays the permit ID, permit type, any alternate IDs, record status, the person who deleted the record, and the date the record was deleted.



Interdependency

None

Solution

All

Access

Record portlet > Delete button
 Record portlet > Select a partial record > Delete button
 Record portlet > View Log > Deleted Record Log button

8411-Cap Summary

Version

7.0.0

Description

Enables the application Summary button for users to open the application form and view/edit the application information.

Interdependency

None

Solution

All

Access

Record (Building, Application) Portlet > Detail tab > Summary button

8412-Asset Group Update

Version

7.0.0

Description

Enables the Group Update menu button in the Assets portlet, the Assets tab of the Records portlet, and the Work Orders portlet so users can update multiple assets one time.

Interdependency

| | |
|--------|----------------------------|
| Parent | 8189-Asset Data Management |
| Parent | 8203-Daily Record Asset |

Solution

Accela Asset Management

Access

Assets portlet > Menu button > Group Update button

Records portlet > Assets tab > Menu button > Group Update button

8413-MyTask - Inspections

Version

7.0.0

Description

Enables the Inspections tab in the My Tasks portlet for users to manage inspections in the My Tasks portlet.

Set to full access to enable the user group to view the Inspections tab in the My Tasks portlet so that users can search for, view, and manage inspections assigned to their user group. Set to no access to prevent the Inspections tab from displaying in the user's My Tasks portlet.

Interdependency

None

Solution

Interdependency | 8143-Inspection Scheduling

Only when you enable FID 8413 and FID 8143, can users view the Inspections tab on the My Tasks portlet.

Access

My Tasks portlet > Inspections tab

8414-Void Payment

Version

7.0.0

Description

Enables the Void tab in the Payment Processing portlet for users to void payments for one or multiple records.

Interdependency

None

Solution

All

Access

Payment Processing portlet > Void tab

8415-Refund Payment

Version

7.0.0

Description

Enables the Refund tab in the Payment Processing portlet for users to refund one or multiple fee payments through the Payment Processing portlet.

Interdependency

None

Solution

All

Access

Payment Processing portlet > Refund tab

8416-Invoices Management

Version

7.0.0

Description

Enables the Invoices tab in the Payment Processing portlet for users to invoice a payment.

Interdependency

None

Solution

All

Access

Payment Processing portlet > Invoices tab

8417-Enable POS

Version

7.0.0

Description

Enables the Add POS Item button in the Payment Processing portlet for users to add POS items into a payment list.

Interdependency

| | |
|----------------|-------------------------|
| Parent | 8393-Payment Processing |
| Interoperation | 8288-Fees Point Of Sale |

Solution

All

Access

Payment Processing portlet > Add POS Item button

8418-Work Order Cost Distribution

Version

7.0.0

Description

- Enables the Distribution Costs button in various places in the Work Orders portlet for users to distribute the total cost for completing a work order by asset count, asset size, asset type, or by manual allocation.
- Enables the Distribution History tab in the Work Orders portlet for users to view the cost distribution history of the work order.

Interdependency

None

Solution

Accela Asset Management

Access

Work Orders portlet > Assignments and Costs tab > Distribute Costs button

Work Orders portlet > Parts tab > Distribute Costs button

Work Orders portlet > Record tab > Menu button > Distribute Costs button

Work Orders portlet > Summary tab > Menu button > Distribute Costs button

Work Orders portlet > Distribution History tab

8419-Delete Workflow History

Version

7.0.0

Description

Enables the Delete button in the Workflow History tab of the Record portlet, so users can delete workflow history records.

Interdependency

None

Solution

All

Access

Record portlet > Workflow History tab > Delete button

8420-Daily Education Info

Version

7.0.0

Description

- Enables the Education section in the application intake form for users to add education information about records.
- Enables the Education tab in the Record portlet for users to manage education for records.

Interdependency

Child

| 8421-Daily Delete Required Education

Solution

All

Access

Record portlet > Education tab

Record portlet > New > (In the application intake form) Education section

8421-Daily Delete Required Education

Version

7.0.0

Description

Enables the Delete button in the Education tab in the Record portlet or the application intake form, so users can delete some education information from records.

Interdependency

Parent | 8420-Daily Education Info

Solution

All

Access

Record portlet > Education tab > Delete button

Record portlet > New > (In the application intake form) Education section > Delete button

8422-Random Audit History

Version

7.0.0

Description

Enables the Random Audit History tab in the Record portlet for users to view the random audits that include a record or a license.

Interdependency

None

Solution

All

Access

Record portlet > Random Audit History tab

8423-Random audit set

Version

7.0.0

Description

Enables the Random Audit tab in the Set portlet for users to create and manage random audit sets.

Interdependency

None

Solution

All

Access

Set portlet > Random Audit tab

8424-Re-generate/Delete Random Audit Set

Version

7.0.0

Description

- Enables the Delete button in the Random Audit detail tabs of the Set portlet, so users can delete a random audit set.
- Together with FID 8426 (which assigns supervisor access right to the users), enables the Regenerate Audit button in the Set Member tab of the Random Audit detail tabs of the Set portlet, after users generate the audit set by clicking the Generate Audit button.

Interdependency

Interoperation

8426-Random Audit Supervisor

Solution

All

Access

Set portlet > Random Audit tab > Delete button

Set portlet > Random Audit tab > Set Member tab > (After you click the Generate Audit button) Regenerate Audit button

8425-Execute Script

Version

7.0.0

Description

Enables the Execute Script button in the Random Audit detail tabs of the Set portlet, so users can run a pre-configured EMSE script on the set members of a set.

Interdependency

None

Solution

All

Access

Set portlet > Random Audit tab > Record Audit Set/Inspection Audit Set > Set/Set Member tab

8426-Random Audit Supervisor

Version

7.0.0

Description

Assigns supervisor access right to the users. Together with FID 8424, enables the Regenerate Audit button in the Set Member tab of the Random Audit detail tabs of the Set portlet, after users generate the audit set by clicking the Generate Audit button.

Interdependency

Interoperation

8424-Re-generate/Delete random audit set

Solution

All

Access

Set portlet > Random Audit tab > Set Member tab > (After you click the Generate Audit button) Regenerate Audit button

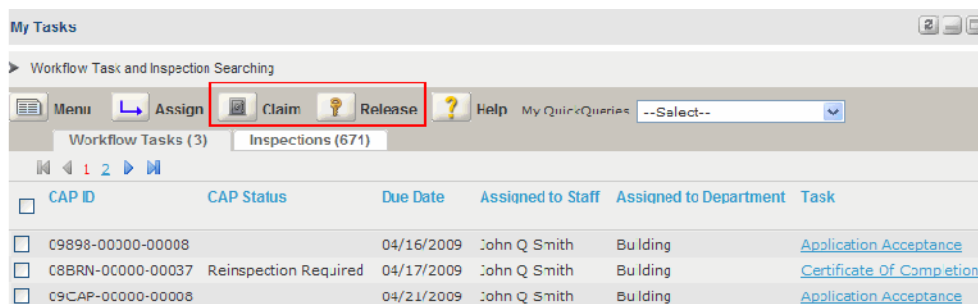
8427-Claim or Release Task Assignment

Version

6.7.0

Description

Enables the Claim and Release buttons in the Workflow Tasks tab of the My Tasks portlet, so a user can assign (by clicking the Claim button) a workflow task to himself/herself, or release the claim (by clicking the Release button).



Interdependency

Interoperation

8132-Workflow

Solution

All

Access

My Tasks portlet > Workflow Tasks tab > Claim, Release buttons

8428-Daily Continuing Education Info

Version

7.0.0

Description

- Enables the Continuing Education section in the application intake form for users to add continuing education information about records.

- Enables the Continuing Education tab in the Record portlet for users to manage continuing education for records.

Interdependency

Child | 8429-Daily Delete Required Continuing Education

Solution

All

Access

Record portlet > Continuing Education tab

Record portlet > New > (In the application intake form) Continuing Education section

8429-Daily Delete Required Continuing Education

Version

7.0.0

Description

Enables the Delete button in the Continuing Education tab in the Record portlet or the application intake form, so users can delete some continuing education information from records.

Interdependency

Parent | 8428-Daily Continuing Education Info

Solution

All

Access

Record portlet > Continuing Education tab > Delete button

Record portlet > New > (In the application intake form) Continuing Education section > Delete button

8430-Daily Examination Info

Version

7.0.0

Description

- Enables the Examination section in the application intake form for users to add examination information about records.
- Enables the Examination tab in the Record portlet for users to manage examination for records.

Interdependency

Child | 8431-Daily Delete Required Examination

Solution

All

Access

Record portlet > Examination tab

Record portlet > New > (In the application intake form) Examination section

8431-Daily Delete Required Examination

Version

7.0.0

Description

Enables the Delete button in the Examination tab in the Record portlet or the application intake form, so users can delete some examinations from records.

Interdependency

Parent 8430-Daily Examination Info

Solution

All

Access

Record portlet > Examination tab > Delete button

Record portlet > New > (In the application intake form) Examination section > Delete button

8432-User Meeting Calendar

Version

7.0.0

Description

Enables the Meeting Calendar views in the Calendar portlet for users to manage meeting schedules in the meeting calendars.

Interdependency

None

Solution

All

Access

Calendar portlet > Calendar by Type tree node > Meeting tree node

8433-Document Permission Settings

Version

7.0.0

Description

Enables the Assign button in the Documents tab in the Record portlet, so users can control which documents are available for public users to view or upload.

Interdependency

Parent 8214-View EDMS Attachment List

Solution

All

Access

Record portlet > Documents tab > Assign button

8434-Global Search

Version

7.0.0

Description

Enables the Global Search function for users to perform a global search.

Interdependency

None

Solution

All

Access

Global Search box

8435-Daily - Cashier - Pay More

Version

6.7.0

Description

Enables the Pay button in the Payment tab for users to process a payment from the record portlet.

Interdependency

| | |
|----------------|---------------------------------|
| Interoperation | 8108-Cashier Payment |
| Child | 8445-Daily - Cashier - Pay More |

If you enable FID 8108, the Pay button always displays. If you set FID 8108 to read only or no access, the Pay button only displays when you enable FID 8435.

Solution

All

Access

Record portlet > Payment tab > Pay button

8436-Daily - Cashier - Apply

Version

6.7.0

Description

Enables the Apply button in the Payment tab for users to apply payments from the record portlet.

Interdependency

| | |
|----------------|----------------------|
| Interoperation | 8108-Cashier Payment |
|----------------|----------------------|

If you enable FID 8108, the Apply button always displays. If you set FID 8108 to read only or no access, the Apply button only displays when you enable FID 8436.

Solution

All

Access

Record portlet > Payment tab > Apply button

8437-Daily - Cashier - Refund

Version

6.7.0

Description

Enables the Refund button in the Payment tab for users to handle a full or partial refund of un-allocated payments from the record portlet.

Interdependency

Interoperation | 8108-Cashier Payment

If you enable FID 8108, the Refund button always displays. If you set FID 8108 to read only or no access, the Refund button only displays when you enable FID 8437.

Solution

All

Access

Record portlet > Payment tab > Refund button

8438-Daily - Cashier - Void

Version

6.7.0

Description

Enables the Void button in the Payment tab for users to void payments directly from the application.

Interdependency

Interoperation | 8108-Cashier Payment

If you enable FID 8108, the Void button always displays. If you set FID 8108 to read only or no access, the Void button only displays when you enable FID 8438.

Solution

All

Access

Record portlet > Payment tab > Void button

8439-Daily - Cashier - Generate Receipt

Version

6.7.0

Description

Enables the Generate Receipt button in the Payment tab for users to generate the receipt for a payment from the record portlet.

Interdependency

| | | |
|----------------|--|----------------------|
| Interoperation | | 8108-Cashier Payment |
|----------------|--|----------------------|

If you enable FID 8108, the Generate Receipt button always displays. If you set FID 8108 to read only or no access, the Generate Receipt button only displays when you enable FID 8439.

Solution

All

Access

Record portlet > Payment tab > Generate Receipt button

8440-Daily - Cashier - Fund Transfer

Version

6.7.0

Description

Enables the Fund Transfer button in the Payment tab for users to transfer funds between trust accounts.

Interdependency

| | | |
|----------------|--|----------------------|
| Interoperation | | 8108-Cashier Payment |
|----------------|--|----------------------|

If you enable FID 8108, the Fund Transfer button always displays. If you set FID 8108 to read only or no access, the Fund Transfer button only displays when you enable FID 8440.

Solution

All

Access

Record portlet > Payment tab > Refund button

8441-Initiated Product Info

Version

7.0.0

Description

Enables the Initiated by Product field in the Summary tab of the Record portlet. This field shows the product that created the record, such as Civic Platform Classic, Accela Vantage360, Citizen Access, Accela Wireless, or other Civic Platform applications.

Interdependency

| | | |
|--------|--|------------------|
| Parent | | 8395-CAP Summary |
|--------|--|------------------|

Solution

All

Access

Record portlet > Summary tab > Initiated by Product field

8442-Inspection History Audit Log

Version

7.0.0

Description

Enables the View Log button in the Inspections portlet for users to view the historical audit logs on inspections.

Interdependency

Interoperation | 0307-Audit Logger Definition

Solution

All

Access

Inspections portlet > View Log button

Inspections portlet > Inspection Detail tab > View Log button

8443-Application Audit Log

Version

7.0.0

Description

Enables the Deleted Record Log under View Log button in the Record portlet, so users can view the record deletion logs.

Interdependency

None

Solution

All

Access

Record portlet > View Log button > Deleted Record Log button option

8444-Application Status History Log

Version

7.0.0

Description

Enables the View Log button in the Application History tab of the Record portlet, so users can view the application status history.

Interdependency

None

Solution

All

Access

Record portlet > Application History tab > View Log button

8445-Daily - Cashier - Pay More

Version

Cashier

Description

Enables the Pay More button in the Payment tab after users click the Pay button for a payment from the record portlet.

Interdependency

| | |
|----------------|---------------------------------|
| Interoperation | 8108-Cashier Payment |
| Parent | 8435-Daily - Cashier - Pay More |

If you enable FID 8108, the Pay More button always displays. If you set FID 8108 to read only or no access, the Pay More button only displays when you enable FID 8445.

Solution

All

Access

Record portlet > Payment tab > Pay button > (In the payment details page) Pay More button

8446-Disable Licensed Professionals Delete

Version

6.7.0

Description

Disables the Delete button in the Professionals tab of the Record portlet to forbid users from deleting licensed professionals from records. If you disable this FID, the Delete button displays.

Interdependency

| | |
|--------|-----------------------------|
| Parent | 8032-Licensed Professionals |
|--------|-----------------------------|

Solution

All

Access

Record portlet > Professionals tab > Delete button

8447-Part Transaction-Receive

Version

7.0.5

Description

Enables the Receive as a transaction type option in the Part Transaction tab of the Part Inventory portlet, so users can create or modify or void receive-type part transactions.

Interdependency

Parent | 8273-Parts Inventory

Solution

Accela Asset Management

Access

Part Inventory portlet > Part Transaction tab > (New or modify) Receive as Transaction Type

8448-Part Transaction-Transfer

Version

7.0.5

Description

Enables the Transfer as a transaction type option in the Part Transaction tab of the Part Inventory portlet, so users can create or modify or void transfer-type part transactions.

Interdependency

Parent | 8273-Parts Inventory

Solution

Accela Asset Management

Access

Part Inventory portlet > Part Transaction tab > (New or modify) Transfer as Transaction Type

8449-Part Transaction-Adjust

Version

7.0.5

Description

Enables the Adjust as a transaction type option in the Part Transaction tab of the Part Inventory portlet, so users can create or modify, or void adjust-type part transactions.

Interdependency

Parent | 8273-Parts Inventory

Solution

Accela Asset Management

Access

Part Inventory portlet > Part Transaction tab > (New or modify) Adjust as Transaction Type

8450-Part Transaction-Reserve

Version

7.0.5

Description

Enables the Reserve as a transaction type option in the Part Transaction tab of the Part Inventory portlet, so users can create or modify or void reserve-type part transactions.

Interdependency

Parent | 8273-Parts Inventory

Solution

Accela Asset Management

Access

Part Inventory portlet > Part Transaction tab > (New or modify) Reserve as Transaction Type

8451-Part Transaction-Void

Version

7.0.5

Description

Enables the Void button in the Part Transaction tab of the Part Inventory portlet, so users can select part transactions to void.

Interdependency

Parent | 8273-Parts Inventory

Solution

Accela Asset Management

Access

Part Inventory portlet > Part Transaction tab > Void button

8456-Fee Schedule Drop Down List

Version

6.7.0

Description

When users add fee items in the Fee tab of the Record portlet, enables the Fee Schedule drop-down list to provide fee schedule options not associated with the current record type.

Interdependency

None

Solution

All

Access

Record portlet > Fee tab > Add button > (In the fee item-add page) Fee Schedule selection field

8457-Create Free Form Condition

Version

7.0.5

Description

Sets the Condition Name as editable in the Conditions tab, so users can add free-form (ad hoc) conditions in addition to standard conditions.

Interdependency

This FID works for all enable Conditions tabs.

Solution

All

Access

Record (Inspections, Addresses, Parcels, Owners, Assets, Contacts, Structure & Establishments) portlet > Condition tab

8458-Complete Record and ASI Audit

Version

7.0.5

Description

Enables the record detail logs from the View Log button in the Record portlet, so users can view logs on record details, ASI, ASI tables, documents, and record conditions.

Interdependency

The Record/ASI/ASIT audit log type only works after super agency administrator enables the audit log option in the agency configuration.

| | |
|-------|---|
| Child | 0333-Condition List Audit Log |
| Child | 8468-Inspections List Guide Sheet Audit Log |
| Child | 8471-Document Audit Log |

Solution

All

Access

Record portlet > View Log button > Record Details Log button option

8459-Specific Record and ASI Audit Log

Version

7.0.5

Description

Enables the View Log button in the detail tab of the Record portlet, so users can view the record audit logs.

Interdependency

The Record/ASI/ASIT audit log type only works after super agency administrator enables the audit log option in the agency configuration.

Solution

All

Access

Record portlet > Record Detail tab > View Log button

8460-Delete Related Records

Version

7.1.0

Description

Enables the Delete button in the Related Records tab of the Record portlet for users to delete related records from the current record. After enabling this FID, you cannot disassociate child records with prior parent associations.

Interdependency

None

Solution

All

Access

Record portlet > Related Records tab > Delete button

8461-Show Work Order Cost Information

Version

7.1.0

Description

Displays the actual costs (instead of "****") associated with the work orders in the cost-related columns in various places, such as the Cost, Unit Rate, Total Rate, and Total Cost columns.

This FID setting is also applicable to Mobile Office. If you set this FID to full access or read only, Mobile Office displays actual values for the cost fields. The values include Total Cost, Unit Cost, Fix Cost, and Cost LTD. If you disable this FID and set it to no access, Mobile Office displays asterisks "****" for the cost fields.

Interdependency

FID 8484 Cost Item Permission works only if you set FID 8461 to full access or read only.

| | |
|-------|---------------------------|
| Child | 8484-Cost Item Permission |
|-------|---------------------------|

Solution

Accela Asset Management

Mobile Office

Access

Work Orders portlet > Summary tab > Costing List section

Work Orders portlet > Assignments and Costs tab

Work Orders portlet > Distribution History tab

Work Orders portlet > Assets

Assets portlet > Asset Detail tab > Cost LTD field

Assets portlet > Linked Assets tab > Cost LTD field

Mobile Office > Records > Cost and Parts tab > Cost Summary list

Mobile Office > Records > Cost and Parts tab > Cost subtab > Cost Items list

Mobile Office > Records > Cost and Parts tab > Cost subtab > Cost Items list > Actions drop-down menu > Open button > Cost Detail pop-up window

Mobile Office > Records > Cost and Parts tab > Cost subtab > Cost Items list > Add Cost button > Select Cost pop-up window

Mobile Office > Records > Work Order Tasks tab > Work Order Tasks list

Mobile Office > Records > Work Order Tasks tab > Work Order Tasks list > Actions drop-down menu > Open button > Edit Work Order Task pop-up window

Mobile Office > Assets > Summary tab

8462-Time Accounting on inspections

Version

7.1.0

Description

Enables the entry of time accounting data in the Resulting Inspections portlet, so users can select time accounting types and specify time accounting details for an inspection.

Set on inspections to control whether users can access the time accounting entries on inspections from Civic Platform and Mobile Office. When set to full access, and after inspectors synchronize the inspection statuses from Mobile Office to Civic Platform, the Time Spent on Inspection section in the inspection detail page shows the time accounting records that inspectors created in Mobile Office. When set to read only, the Actions drop-down list does not display.

Interdependency

| | |
|--------|-------------------------|
| Parent | 8145-Inspection Results |
|--------|-------------------------|

Solution

All

Access

Inspections portlet > Menu > Result item

Inspections portlet > Manage Inspection menu > Result Inspections item

8463-Payment Auto Allocation

Version

7.1.0

Description

Skips the payment allocation screen when users post a payment in the record payment tab that exactly matches the balance due on the account. Civic Platform automatically allocates the full payment to each fee item.

Interdependency

None

Solution

All

Access

Record portlet > Payment tab > Pay button

8464-SSN and FEIN Mask

Version

7.1.0

Description

Masks the digits in the SSN and FEIN fields to protect the privacy for the person, such as licensed professional or contact.

To apply the mask to the FEIN field, you must set the FID 8464 to full access. FID 8464 determines whether the SSN mask and FEIN mask apply to the SSN and FEIN fields. When you set the FID to full access, users can only view the masked data of the SSN and FEIN fields in the Civic Platform.

Interdependency

None

Solution

All

Access

Record portlet > Contact tab

Record portlet > Professionals form

Record portlet > Search button > Record search form

Contacts portlet > Look Up, Search, Contact Detail tab

Licensed Professionals portlet > Look Up, Search, Professional Detail tab

Addresses portlet > Contact tab

Trust Account portlet > Associated People tab

8465-Deposit Trust Account During the payment

Version

7.1.0

Description

Enables the Trust Account Deposit button in the Payment tab of the Record portlet, so users can make a deposit into the associated trust account in the tab.

Interdependency

None

Solution

All

Access

Record portlet > Payment tab > Trust Account Deposit button

8466-Daily Work Order Costing Group Definition

Version

7.1.0

Description

Enables the Cost Group Management button in the Assignments and Costs tab of the Work Orders portlet for users to create and manage cost groups.

Interdependency

Parent | 8191-Work Order Costing

Solution

Accela Asset Management

Access

Work Orders portlet > Assignments and Costs tab > Cost Group Management button

8467-Schedule Related Inspections

Version

7.1.0

Description

- Enables the Schedule Related Inspections in the Manage Inspection drop-down menu in the Inspections portlet or the Calendar portlet, so users can manually add related inspections to an inspection.
- Enables the Related Inspection tab in the Inspections portlet for users to view and manage related inspections.

Interdependency

Parent | 8400-Manage Inspection

Solution

All

Access

Inspections portlet > Manage Inspection button > Schedule Related Inspections button

Inspections portlet > Manage Inspection button > Related Inspections button

Calendar portlet > Manage Inspection button > Schedule Related Inspections button

Record portlet > Manage Inspection button > Schedule Related Inspections button

8468-Inspections List Guide Sheet Audit Log

Version

7.1.0

Description

- Controls whether the Guide Sheet Log button under the View Log menu is available on the Inspection list portlet.
- Controls whether the Guide Sheet option is available as an audit type if users select to view the record details log after clicking the View Log button in the Record portlet.

Interdependency

The guidesheet audit log type only works after super agency administrator enables the audit log option in the agency configuration.

Parent | 8458-Complete Record and ASI Audit

Solution

All

Access

Record portlet > View Log button > Record Details Log button option > Guide Sheet option in Audit Type in the Audit Log page

8469-Inspections Detail Guide Sheet Audit Log

Version

7.1.0

Description

Enables the View Log button in the Guide Sheet tab of the Inspection detail portlet for users to view audit logs on guide sheets.

Interdependency

The guidesheet audit log type only works after super agency administrator enables the audit log option in the agency configuration.

Interoperation | 0307-Audit Logger Definition

Solution

All

Access

Inspections portlet > Guide Sheet tab > View Log button

8470-Time Accounting on Workflow

Version

7.1.0

Description

Enables the entry of time accounting data in the workflow tasks and ad hoc tasks from the Workflow tab of the Record portlet, so users can select time accounting types and specify time accounting details for a workflow task.

Set to control whether users can access the Workflow portlet to locate time accounting records on workflow tasks, ad hoc tasks, workflow history, and workflow tasks. When set to full access, and an inspector synchronizes the inspection statuses from Mobile Office to Civic Platform, the Time Spent on the Task section in the workflow page shows the time accounting records that inspectors created in Mobile Office.

Interdependency

Parent | 8132-Workflow

Solution

All

Access

Record portlet > Workflow tab > (After selecting a task in the task tree) Task Details

8471-Document Audit Log

Version

7.1.0

Description

Enables the View Log button for the attachments to records or inspections, for users to view the audit logs on documents.

Interdependency

The document audit log type only works after super agency administrator enables the audit log option in the agency configuration.

Parent | 8458-Complete Record and ASI Audit

Solution

All

Access

Record portlet > View Log button > Record Details Log button option > Document option in Audit Type in the Audit Log page

Record portlet > Document tab > View Log button

Inspections portlet > Document tab > View Log button

8472-Disable ADS Document View Button

Version

7.0.5

Description

Disables the View button in the Documents tab of the Record portlet for documents with ADS source.

Interdependency

Parent | 8214-View EDMS Attachment List

Solution

All

Access

Record (Inspection, Calendars, Asset Condition Assessment or Parcels) portlet > Documents tab > (For documents with ADS source) View button

8473-EDMS Document URL Link

Version

7.2.0

Description

Enables the download link at each document in the Documents tab, so users can click the download link to download a document.

Interdependency

Parent

8214-View EDMS Attachment List

Solution

All

Access

Record (Inspection, Calendars, Asset Condition Assessment or Parcels) portlet > Documents tab > Download link at a document

8474-Check-in Permission

Version

7.1.0

Description

Enables the Check-In Revisions button in the Civic Platform add-on toolbar for Adobe Acrobat X Pro, so users can check in reviewed documents.

Interdependency

None

Solution

All

Access

Record (Inspection, Calendars, Asset Condition Assessment or Parcels) portlet > Documents tab > Review link > Check-In Revisions button in the Civic Platform add-on toolbar for Adobe Acrobat X Pro

8475-Asset Audit Log

Version

7.2.0

Description

The FID enables users to view the asset audit logs of historical modifications to asset details, asset attributes and asset attribute tables. The logs record the actions performed such as added, updated, or deleted, and also record the field, relationship, the entity ID, log time, value, and operator information.

Interdependency

The asset audit log type only works after super agency administrator enables the audit log options in the agency configuration.

Parent

8189-Asset Data Management

Solution

Accela Asset Management

Access

Assets portlet > View Log button > (In the Audit Type field of the Audit Log pop-up window) Asset option

Assets portlet > Asset Detail > View Log

8476-Examination Audit Log

Version

7.2.0

Description

Enables the View Log button for the examinations to records, for users to view the audit logs on examination information.

Interdependency

The examination audit log only works after super agency administrator enables the Examination audit log option in the agency configuration.

Solution

All

Access

Record portlet > Record secondary tab > View Log button

8477-Document Review Permission

Version

7.1.0

Description

This FID controls whether users have permission to review documents or not.

Interdependency

You must enter other EDR functionality. You must install EDR.

Solution

All

Access

Record portlet > Document tab > Action Menu for a selected document > Review

8478-Document Assign Permission

Version

7.2.0

Description

This FID controls whether users have permission to assign review tasks for documents.

Interdependency

You must enable other electronic document review (EDR) functionality. You must install EDR.

Solution

All

Access

Record portlet > Document tab > Action Menu for a selected document > Assign

8479-Deactivate Contacts in Set Contacts

Version

7.2.0

Description

Enables the Deactivate button on the Contacts tab for a record set.

Interdependency

None

Solution

All

Access

Set portlet > Records tab > Contacts tab

8480-Conditions of Approval

Version

7.2.0

Description

Enables the Conditions of Approval tab for a record, an inspection, and a record set.

Interdependency

None

Solution

All

Access

Record portlet > Select a record or open the Condition Notice window > Conditions of Approval tab

Inspection portlet > Select a record or open the Condition Notice window > Conditions of Approval tab

Set portlet > Records tab > Select a record > Conditions of Approval tab

8481-Delete Conditions of Approval

Version

7.2.0

Description

Controls whether users can delete conditions of approval.

Interdependency

Parent

8480-Conditions of Approval

Solution

All

Access

Record portlet > Conditions of Approval tab

Inspection portlet > Conditions of Approval tab

Set portlet > Records tab > Conditions of Approval tab

8482-Create a Set in Record List

Version

7.3

Description

Enable this FID to display the **Create a Set** button on the Record list portlet. With this button, users can create sets directly from the Record list portlet.

Interdependency

None

Solution

All

Access

Record list portlet > Create a Set button

8483 Meetings

Version

7.3

Description

Controls access permission for the Record > Meeting tab.

**Note:**

FID 8047 & 8229 controlled access to this tab in prior version releases.

Interdependency

None

Solution

All

Access

Record portlet > Meeting tab

8484-Cost Item Permission

Version

7.2.0

Description

Controls whether user permission defined in the Recipient tab for a cost item applies to Civic Platform.

Interdependency

Parent | 8461-Show Work Order Cost Information

Solution

Accela Asset Management

Access

Setup portlet > Work Orders > Cost Item > Recipient tab

8485-Daily Record Set List

Version

7.3

Description

Enable to display the Set secondary tab on the Record detail portlet. This tab displays a list of sets for which the current record is a member.

Interdependency

None

Solution

All

Access

Record portlet > Set tab

8486-Compare Documents

Version

7.2.0

Description

Enable the Compare Documents button in the Documents tab on the Record detail portlet, and the Document Review Tasks tab on the My Tasks portlet.

Interdependency

None

Solution

All

Access

Record portlet > Documents tab > Manage Documents > Compare Documents button

My Tasks portlet > Document Review Tasks > Compare Documents button

8490-Record Contact Log

Version

7.3

Description

Enables the **View Log** button in the record contact portlet for users to view the historical audit logs on contacts.

Interdependency

N/A

Solution

All

Access

Record portlet > Contact tab > View Log button

8491-Workflow History Log

Version

7.3

Description

Enables the **View Log** button in the workflow history portlet for users to view the workflow audit log.

Interdependency

N/A

Solution

All

Access

Record portlet > Workflow History tab > View Log button

8492-Communication List

Version

7.3

Description

Controls whether the 360-degree communication viewer displays for daily users.

Interdependency

None

Solution

All

Access

Communication Manager portlet

8493-Consolidated Record Activities

Version

7.3

Description

Controls whether the Consolidated Record Activities tab displays on records.

Interdependency

None

Solution

All

Access

Record portlet > Consolidated Record Activities tab

8494-Record Communication List

Version

7.3

Description

Controls whether the Communication tab displays on records.

Interdependency

None

Solution

All

Access

Record portlet > Communication List tab

8495-Show Inspection Submitted Location

Version

7.2.6

Description

Controls the display of the GIS button on the Inspections list portlet.

When agencies set the FID to Full Access or Read Only, clicking the GIS button displays a drop-down menu with the Show Scheduled Location and Show Scheduled and Submitted Locations options. If a user selects the Show Scheduled Location option, the map viewer launches and then shows only the scheduled location for every inspection that the user selected from the Inspection list portlet. If the user selects the Show Scheduled and Submitted Locations option, the map viewer opens and shows both scheduled and inspected locations for every selected inspection with different map markers indicating the locations.

When agencies set the FID to No Access, clicking the GIS button displays the map viewer that shows only the scheduled location for every selected inspection.

Interdependency

None

Solution

Civic Platform

Access

Inspections portlet

8496-Optimize Inspection Route

Version

7.2.6

Description

Controls the display of the Order By button on the Inspection Route Sheet portlet. When you set this FID to Full Access or Read Only, the Order By button appears. When you set this FID to No Access, the Order By button is not available.

Interdependency

| | |
|--------|-----------------------------|
| Parent | 8146-Inspection Route Sheet |
|--------|-----------------------------|

Solution

Civic Platform

Access

Inspections portlet > Route Sheet

8497-Result Inspections by CSV

Version

7.2.6

Description

Controls the display of the Result Inspections button on the Documents tab for a licensed professional. Agency users can click the Result Inspections button to update a batch of inspection results according to the inspection result CSV file that a contract inspector or a self-certified inspector uploads from Citizen Access.

Interdependency

None

Solution

Civic Platform

Access

Licensed Professionals portlet > Documents tab

8499-New Document from Scan

Version

7.3.1

Description

Controls the availability of the **New from Scan** button on the Documents tab.

Interdependencies

Users must install the Accela Document Scan client on their workstations. See Chapter 15, Accela Document Scan Installation, in the *Civic Platform 7.3.1 Installation Guide* for more information.

Solution

All

Access

Record portlet > Documents tab

8500-Asset Condition Assessment Costing

Version

7.3.1

Description

Enables the Assignments and Costs tab in the Assets portlet for users to add and manage assignments and costs for asset condition assessments.

Interdependency

None

Solution

Accela Asset Management

Access

Assets portlet > Assignments and Costs tab

8501-Display Desired Date Field

Version

7.3.1.1

Description

This FID controls whether users can view or edit the Desired Date and Desired Time fields when scheduling inspections.

Interdependency

None

Solution

Accela Land Management

Access

Inspections portlet > Manage Inspection > Schedule Inspection

8502-Pending Inspection

Version

7.3.3

Description

This FID disables the Pending Inspection button on the Schedule Inspections form.

Interdependency

None

Solution

Accela Land Management

Access

Inspections portlet > Manage Inspections > Schedule Inspections

8503 - Attach Record Document to People

Version

7.3.3

Description

This FID enables users to attach documents in a record to a licensed professional or contact which is associated with the record.

Interdependency

Parent

8214-View EDMS Attachment List

Access

Record portlet > Documents tab > Manage Documents > Add to People button

Record portlet > Application Intake Form > Document section > Also Attach To field

8504 - Document Checklist

Version

7.3.3

Description

This FID controls whether the Doc Review Checklists functionality is available for users to perform document reviews following the guidelines of the checklist.

Interdependency

You must enter other EDR functionality. You must install EDR.

Solution

All

Access

Record portlet > Document tab > Action Menu for a selected document > View Doc Info > Doc Review Checklists tab

Record portlet > Document tab > Action Menu for a selected document > View Doc Info > Doc Review Tasks tab > Checklist sub-tab

Record portlet > Documents tab > Review link > Open Checklists button in the Civic Platform add-on toolbar for Adobe Acrobat XI Pro

8505 - Document Review Comments

Version

7.3.3

Description

This FID controls whether users have permission to view or delete document review comments, and change the discipline or status of the comments in the Doc Review Comments tab.

Interdependency

You must enter other EDR functionality. You must install EDR.

Solution

All

Access

Record portlet > Document tab > Action Menu for a selected document > View Doc Info > Doc Review Comments tab

8506 - Internal User

Version

8.0.0

Description

This FID controls whether the Look Up Staff command is available in the Manage Contacts menu on the Contacts tab of a record. This command provides the ability to associate internal users to an application/record as a contact.

Interdependency

You must enter other EDR functionality. You must install EDR.

Solution

All

Access

Record portlet > Contacts tab > Manage Contacts menu

9999-Log Out

Obsolete.